

PeopleSoft®

PeopleSoft Managing Items 8.8 PeopleBook

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PeopleSoft Managing Items 8.8 PeopleBook

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About These PeopleBooks

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

This preface discusses:

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

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

PeopleSoft Application Prerequisites

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

See *Using PeopleSoft Applications*.

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

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

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

PeopleSoft Application Fundamentals

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

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

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact CPI at 800 888 3559.

Email

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

See Also

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

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

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

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

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

Preface

This preface discusses:

- Pages with deferred processing.
- Common elements used in this PeopleBook.

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

Pages With Deferred Processing

Several pages used to manage PeopleSoft items 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 Application Designer

Common Elements Used in This PeopleBook

Description	Free-flow text up to 30 characters.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
	See <i>PeopleTools 8.44 PeopleBook: Using PeopleSoft Applications</i>
Language or Language Code	The language in which you want the field labels and report headings of the reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Process Frequency (group box)	Designates the appropriate frequency in the Process Frequency group box: <i>Once</i> executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to <i>Don't Run</i> .

	<p><i>Always</i> executes the request every time the batch process runs.</p> <p><i>Don't Run</i> ignores the request when the batch process runs</p>
Process Monitor	This link takes you to the Process List page, where you can view the status of submitted process requests.
Report ID	The report identifier.
Report Manager	This link takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which give you a description of the report and the distribution list).
Recipient's	Select to have a report print in the language defined for the recipient of the report.
Request ID	A request identification that represents a set of selection criteria for a report or process.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format. See <i>PeopleTools 8.44 PeopleBook: PeopleSoft Process Scheduler</i>
Run Control ID	Each run control you create receives a unique run control ID. When you select a process from a menu, a search dialog box appears, asking for a run control ID. If you're in Add mode, enter a new ID for the run control you're about to define. If you're in Update/Display mode, enter an existing run control ID or press Enter and select from the list of available run control IDs.
Short Description	Free-flow text up to 15 characters.
Specified	Select to have a report print in the language that you specify in the Language field.
Status	the options in this field are <i>Active</i> or <i>Inactive</i> . By linking status and effective date, you can retain historical information and plan future implementation. For auditing purposes, PeopleSoft encourages inactivating data that is no longer in use instead of deleting it.
User ID	The system identifier for the individual who generates a transaction.

CHAPTER 1

Getting Started with PeopleSoft Managing Items PeopleBook

This chapter provides an overview of managing items and implementing items.

Managing Items Overview

PeopleSoft managing items includes these topics:

- Working with items.
- Defining item control values.
- Defining items.
- Loading items.
- Using item catalog maintenance.
- Using group purchase organizations.
- Listing delivered workflow.
- Generating PeopleSoft item reports.

Implementing Items for PeopleSoft

Implementing items does not require additional table-loading implementation steps; you define items when you set up application such as PeopleSoft Manufacturing, PeopleSoft Inventory, PeopleSoft Purchasing, PeopleSoft Order Management, PeopleSoft eProcurement, and PeopleSoft Strategic Sourcing. In the planning phase of the 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 8.8 PeopleBook, with information about where to find the most current version of each.

PeopleSoft also provides component interfaces to help you load data from the existing system into PeopleSoft tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have component interfaces:

Component	Component Interface	Reference
Master Item Load Component Integration	IN_MST_ITEM_XLS	See <i>PeopleSoft Supply Chain Management Integration 8.8 PeopleBook</i> , “Managing PeopleSoft Supply Chain Management Integration Points,” Using Inbound Transactions.
Master Item Vendor Load Component	IN_VND_ITEM_XLS	See <i>PeopleSoft Supply Chain Management Integration 8.8 PeopleBook</i> , “Managing PeopleSoft Supply Chain Management Integration Points,” Using Inbound Transactions.
Item Groups	INV_ITEM_GROUPS_CI	See Chapter 3, “Defining Item Control Values,” Assigning Items to Groups, page 62.
Stocking Periods	STOCK_PERIOD_CI	See Chapter 3, “Defining Item Control Values,” Defining Stocking Periods, page 63.

Other Sources of Information

In the planning phase of the 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”

PeopleTools 8.44 PeopleBook: PeopleSoft Component Interfaces

CHAPTER 2

Working With Items

This chapter discusses how to:

- Access item ID navigational features.
- Manage inventory by item status.
- Use item prompting.
- Fulfill orders with substitute items.
- Use Universal Product Numbers (UPNs).
- Use device tracking.
- Define custom item attributes.
- Use item quantity unit of measure (UOM).
- Establish quantity precision and rounding rules for items.
- View item information.
- Use enterprise integration points for items.

Accessing Item ID Navigational Features

This section discusses how to:

- Use zero fill functionality.
- Enter new item IDs quickly.
- Increase search speed for item and product IDs.
- View a list of established vendors.

Pages Used to Access Item ID Navigational Features

Page Name	Object Name	Navigation	Usage
Item Search Criteria	ITEM_SEARCH_SP	<p>Click the Item Search/Item Links button next to any editable Item ID or Product ID field.</p> <p>On the Transfer page, click the Item Search or Product Search link.</p>	Increase the search speed for the item and product IDs when you process inventory movements, sales orders, and material stock requests.
Item Vendor Priority	ITM_VNDR_PRTY_HC	Click the Item Vendor Priority link for an item line on the Item Search Criteria page.	View a list of vendors that are already established as suppliers of the item that you want to order. This page can help you make decisions about where to place an order for an item.

Using Zero Fill Functionality

There is a zero fill feature for the item ID fields that appear in Update, Update/Display, and Correction item ID search boxes. When you enter item IDs in these search boxes, you can omit the leading zeros and the system will add leading zeros before activating the page.

Entering New Item IDs Quickly

To enter new items, use the page transfer options that are available from:

- Material Stock Request component.
- Define Par Location component.
- Express Putaway component.

Item Search/Item Links button

On each of these pages, you can click the transfer button next to the item ID field to access a transfer page, which lists several item-related activities: Define Item, Define Business Unit Item, Copy Item, Maintain Item, and Maintain Business Unit Item.

Please select one of the following links:

[Item Search](#)

[Define Item](#)

[Define Business Unit Item](#)

[Copy Item](#)

[Maintain Item](#)

[Maintain Business Unit Item](#)

A sample transfer page

When you select an option from the transfer page, a new session is established in a second browser window. When you complete the selected task, save the session, close the second browser session, and return to the task in the first browser window.

For example, suppose that you're in the process of adding a new order by using the Material Stock Request component and you come across an item ID that is not yet defined. Instead of canceling out of the order, click the transfer button that is next to the Item ID field, and then click the Define Item link on the transfer page to define the item at the setID level. When you finish defining the item, save the component, close the browser window, and click the Define Business Unit Item link on the transfer page to define the item at the business unit level. Save the component, close the browser window, and resume the order entry task in the first browser window, which displays the Material Stock Request component.

Increasing Search Speed for Item and Product IDs

Access the Item Search Criteria page.

Item ID	Description	Item Group	Family	Category

Item Search Criteria page

Note. If you access the page from the Item Search link, the page name is Item Search Criteria: Item Information page. If you access the page from the Product Search link, the page name is Product Search Criteria: Item Information page.

The Item Search Criteria component enables you to display a subset of items or products that meet specific search parameters. You must enter at least one search criterion. Wild cards are supported on all of the search parameters.

Item ID, Item Group, Family, Mfg ID Enter a specific value or a partial value plus an appropriate wild card.

(manufacturing ID), **Mfg**
ItmID (manufacturer's item
ID) **Category, Product ID**

Description, Prod Descr (product description) Enter a complete or partial value. This field does not require wild cards and is not case-sensitive.

Search button Click Search to retrieve any items or products that meet the criteria. The results of the search appear on the Item Information and Product Information tabs.

When you select the check box that is next to an item or product that is listed on the tabs, the Item ID or Product ID field on the original page is automatically populated.

Click the Return button to return to the previous page without making a selection.

See Also

PeopleTools 8.44 PeopleBook: Using PeopleSoft Applications

Managing Inventory by Item Status

This section discusses how to:

- Define item status.
- Update item status.
- Define request parameters for the Change Item Status process.

Item status determines which item transactions can be performed in PeopleSoft Supply Chain Management applications. By changing an item's status you can control, for example, whether items can be included on sales orders, material stock requests, requisitions, and purchase orders. You can also control whether an item can be picked and shipped, used in production, or replenished. The item status that is defined at the business unit level determines which item transactions are permitted in PeopleSoft Inventory, Manufacturing, and Supply Planning. Valid item transactions in PeopleSoft Purchasing are determined by the item status at the setID level, except when the inventory business unit is referenced on requisitions or purchase orders.

Page Used to Manage Inventory by Item Status

Page Name	Object Name	Navigation	Usage
Change Item Status	RUN_INS4000	Items, Define Items and Attributes, Change Item Status	Define request parameters for the Change Item Status process (INS4000). The Change Item Status process changes the current status of item definitions to the future status that is defined for the items when the scheduled date of the future status falls on or before the date that the process is run. The Change Item Status process generates the Change Item Status Exceptions report, listing the items that are scheduled for inactivation that could not be updated to Inactive status.

Defining Item Status

In PeopleSoft Inventory, an item definition at either the setID or the business unit level may have any of these statuses:

Under Initialization

New item definitions are added to the system tables at the setID level with a status of under initialization. The item definition maintains this status until you manually change the current status to Pending Approval on the Define Item - General: Common page. No transactions are permitted while the item definition status is under initialization; however, you can add the item definition to the business unit level and modify the item attributes. Once approved at the setID level, any valid business unit level definition that is created while the item has a status of *Under Initialization* or *Pending Approval* is updated to *Active* status.

Pending Approval

When you complete the item definition at the setID level, you must change the current status from *Under Initialization* to *Pending Approval* manually on the Define Item - General: Common page. In environments that do not require item approval processing, the item status is changed automatically from *Pending Approval* to *Active* when you save the item definition. In environments that use manual item approval processing, the item is available on the Item Approval page. In environments that use workflow item approval processing, setting the item status to *Pending Approval* triggers item approval workflow and makes the item available on the Item Approval page. If the item definition is approved, the item status is updated automatically from *Pending Approval* to *Active* when the Item Approval page is saved. When the system updates an item's status from *Pending Approval* to *Active* at the setID level, any valid business unit level definitions that are created for the item while its status is *Under Initialization* or *Pending Approval* are also updated automatically to *Active*. No transactions are permitted while an item's status is *Pending Approval*.

Denied Approval

If the environment uses item approval processing, you can change the status of an item from *Pending Approval* to *Denied Approval* on the Item Approval page. When an item definition is denied approval, the item's status at both the setID and the business unit levels is changed to *Denied Approval* and no item transactions are permitted.

Active

Once an item's definition is approved, the system changes the item's status to *Active*, meaning that it's available for all transactions across PeopleSoft Supply Chain Management applications. Items with an *Active* status that is defined at the business unit level are eligible for item transactions in PeopleSoft Inventory, Manufacturing, and Supply Planning. Items with an *Active* status that is defined at the set ID level are eligible for most transactions in PeopleSoft Purchasing; however, items that are included on purchase orders and requisitions that reference an inventory business unit must have an *Active* status at the business unit level.

You can change the status of an item with a *Hold*, *Discontinue*, or *Inactive* status back to *Active* at the setID level on the Define Item - General: Common page or at the business unit level on the Define Business Unit Item - General: Common page.

Hold

Items with a *Hold* status are restricted to warehouse movement transactions, adjustments, RMA and RTV transactions, and receiving and putaway transactions. You cannot place or fulfill material stock requests for items with a *Hold* status, nor can these items be used in planning, replenishment, production, purchase order, or requisition transactions. This status does not apply when creating orders in PeopleSoft Order Management.

You can change the status of an item with an *Active*, *Discontinue*, or *Inactive* status to *Hold* at the setID level on the Define Item - General: Common page or at the business unit level on the Define Business Unit Item - General: Common page.

Inactive

Items with *Inactive* status are restricted to warehouse movement transactions, adjustments, RMA and RTV transactions, and receiving transactions. You cannot place or fulfill orders for items with an *Inactive* status, nor can these items be used in planning, replenishment, production, purchase order, or requisition transactions. You can remove item records with an *Inactive* status from the system by using the Inventory Data Purge process (IN_PURGE).

To change an item to *Inactive* status, enter a future status of *Inactive* and a future status date on the Define Business Unit Item - General: Common page for the business unit and item or on the Define Item - General: Common page, and run the Change Item Status process (INS4000). Items that are defined as manufactured items cannot be inactivated. If you use PeopleSoft Manufacturing, you cannot deactivate an item that is specified on a bill of material (BOM), whether it is defined as an assembly or as a component of an assembly. Nor can you deactivate an item if it has a routing definition, if it is defined in a production area, or if production IDs or schedules exist.

Discontinue

The *Discontinue* item status enables you to use up (phase out) on-hand quantity of an item. For items with a *Discontinue* status, you can place and fulfill orders, and you can perform warehouse movement transactions, adjustments, receiving, and RMA and RTV transactions. However, these items cannot be used in planning, replenishment, production, purchase orders, or requisition transactions.

If you generate plans by using PeopleSoft Supply Planning, the optimization process begins driving the inventory level of the discontinued item to zero, or as close to zero as possible on the future status date. The optimization process satisfies demand for the item with whatever quantity is on hand and does not create any new planned orders. This process determines a projected use-up date: the date that, theoretically, quantity that is on hand for the discontinued item is consumed. You can use the projected use-up date as the obsolete date for the component of the BOM. If you do not modify the obsolete date for the component, and if you use substitute items, one of the substitutes for the discontinued item on the BOM substitution list can replace it on that particular production order or schedule. If no substitute items are defined for the discontinued item, the discontinued item is short. If you use PeopleSoft Manufacturing, you can always add production IDs and production schedules manually for a discontinued item if additional quantity on hand is required.

You can change the status of an item with an *Active*, *Hold*, or *Inactive* status to *Discontinue* at the setID level on the Define Item - General: Common page or at the business unit level on the Define Business Unit Item - General: Common page.

See [Chapter 4, “Defining Items.” Approving Item Definitions, page 79.](#)

See [Chapter 2, “Working With Items.” Inactivating Items, page 12.](#)

See [Chapter 2, “Working With Items.” Updating Item Status, page 11.](#)

Understanding Item Status Requirements by Transaction Type

Item definitions with a status of *Under Initialization*, *Pending Approval*, or *Denied Approval* cannot be used in a transaction within the PeopleSoft system. Only items with a status of *Active*, *Hold*, *Discontinue*, or *Inactive* are eligible for transactions and only *Active* items are eligible for all transactions. This list details item status requirements by type of transaction.

Order Transactions	Include all transactions that involve creating or modifying sales orders, material stock requests, or express issues. Only items with a status of <i>Active</i> or <i>Discontinue</i> are valid for these transactions, and only these items appear in the associated item prompts.
Fulfillment Transactions	Include all transactions that involve picking, packing, and shipping orders and material stock requests. Only items with a status of <i>Active</i> or <i>Discontinue</i> are valid for these transactions, and only these items appear in the associated item prompts.
Warehouse Movement Transactions	Include all transactions that involve material transfer from one storage location to another within a business unit. Items with a status of <i>Active</i> , <i>Hold</i> , <i>Discontinue</i> , and <i>Inactive</i> are valid for these transactions, and only these items appear in the associated item prompts.
Adjustment Transactions	Include all transactions in which the system’s record of the quantity that is on hand for a given storage location is modified to reflect a physical count of the storage location’s quantity or miscellaneous adjustments. Items with a status of <i>Active</i> , <i>Hold</i> , <i>Discontinue</i> , and <i>Inactive</i> are valid for these transactions, and only these items appear in the associated item prompts.
RMA (return material authorizations) and RTV Transactions (return-to-vendor transactions)	Items with a status of <i>Active</i> , <i>Hold</i> , <i>Discontinue</i> , and <i>Inactive</i> are valid for return material authorizations and return-to-vendor transactions, and only these items appear in the associated item prompts.
Planning Transactions	Items with a status of <i>Active</i> , <i>Hold</i> , and <i>Discontinue</i> are valid for PeopleSoft Supply Planning transactions, and only these items appear in the associated item prompts. If the item status is <i>Discontinue</i> or if the demand is beyond the item’s future discontinue date, PeopleSoft Supply Planning do not create new planned orders for the item.
Replenishment Transactions	Only items with a status of <i>Active</i> are valid for replenishment transactions, and only these items appear in the associated item prompts.

Manufacturing Transactions

Items with a status of *Active*, *Hold*, and *Discontinue* are valid for manufacturing transactions (such as BOM and routing maintenance, production area and item maintenance, production ID and production schedule maintenance, picking transactions, and completions), and only these items appear in the associated item prompts.

Receiving Transactions

Items with a status of *Active*, *Hold*, *Discontinue*, and *Inactive* are valid for receiving transactions, including PO Receiving, IUT Receiving, and RMA Receiving, and only these items appear in the associated item prompts.

Putaway Transactions

Items with a status of *Active*, *Hold*, and *Discontinue* are valid for putaway transactions, and only these items appear in the associated item prompts.

Purchase Orders and Requisitions

Items with a status of *Active* are valid for purchase orders and requisitions, and only these items appear in the associated item prompts.

This table summarizes the item status requirements for PeopleSoft Supply Chain Management transactions. The status can be *Active*, *Hold*, *Discontinue*, or *Inactive*. An X indicates that the item status is eligible for the transaction in the first column.

Transactions	Active	Hold	Discontinue	Inactive
All Sales Order, MSR, and Express Issue.	X		X	
Picking and Shipping.	X		X	
Warehouse Movements.	X	X	X	X
Adjustments.	X	X	X	X
RMA and RTV.	X	X	X	X
Supply Planning.	X	X	X	
Replenishment.	X			
Manufacturing.	X	X	X	
Receiving.	X	X	X	X
Putaway.	X	X	X	
PO and Requisitions.	X			

Updating Item Status

You can update an item's current status manually, or you can update it by scheduling a status change on a future date and running the Item Change Update process to apply the change on the appropriate date. The technique that you choose depends on the status change that you want to make and when you want to make it.

New Items

New item definitions are added to the system tables in *Under Initialization* status. When you complete the item definition at the setID level, you must manually change the current status from *Under Initialization* to *Pending Approval* on the Define Item - General: Common page. In environments that do not require item approval processing, the item status automatically changes from *Pending Approval* to *Active* when you save the Define Item - General: Common page. In environments that use item approval processing, setting the item status to *Pending Approval* triggers item approval workflow, if set up, and makes the item available on the Item Approval Page. If the item definition is approved, the item status is updated automatically from *Pending Approval* to *Active* when the Item Approval page is saved.

No transactions are permitted while the item definition has *Under Initialization* or *Pending Approval* status; however, you can add the item definition to the business unit level and modify the item attributes. Once approved at the setID level, either automatically or manually on the Item Approval page, any valid business unit level definitions that are created while the item status is *Under Initialization* or *Pending Approval* are updated automatically to *Active* status.

Approved Items

Once an item definition is approved, either automatically or manually by using the Item Approval page, you can manually change the item's current status to *Hold*, *Discontinue*, or back to *Active* at the setID level on the Define Item - General: Common page or at the business unit level on the Define Business Unit Item - General: Common page. Manual changes to an item's current status that are made at the setID level do not affect the current status of item definitions at the business unit level. However, you can quickly copy the current status of the item at the setID on the Define Item - General: Common page to any business units where the item is defined; you do this by using the Copy button to access the Copy SetID to BU Item Status page.

Items with Future Status Changes

You can enter a future status and date for an item at the setID or business unit level and run the Change Item Status process (INS4000) on or after the scheduled date to execute the status change. In addition to *Hold*, *Discontinue*, and *Active*, you can change an item's status to *Inactive* with this method.

You can change the future status of an item at the business unit level on the Define Business Unit Item - General: Common page or at the setID level on the Define Item - General: Common page. Future status changes to *Discontinue*, *Hold*, or *Active* scheduled for the setID apply only to the item definition at the setID level unless you copy the status modifications to the business unit level.

See Also

[Chapter 2, “Working With Items,” Inactivating Items, page 12](#)

Defining Request Parameters for the Change Item Status Process

Access the Change Item Status page.

All and Specific

Run the Change Item Status process for all business units, or select a specific business unit.

When the process runs for a specific business unit, all items that are in the business unit and have a future status date that is before or equal to the process date are processed. In addition, all items that are at the setID level (for the setID that is associated with the business unit) and have a future status date that is before or equal to the process date are processed.

If you select all business units, all items that are in each defined business unit and have a future status date before or equal to the process date are processed. In addition, all items that are in each setID and have a future status date that is prior to or equal to the process date are processed.

The Change Item Status process updates the current status and current status date for each item that is processed.

A setID item status change does not affect the status of an item that is defined in business units unless you explicitly update the business unit items' future status.

A business unit status change does not affect the status of the item defined at the setID level, unless you explicitly update the setID item future status.

Note. If all items that are scheduled for inactivation are successfully updated to *Inactive* status, the Change Item Status process generates a no exception report.

Inactivating Items

You cannot directly update an item's current status to *Inactive*. Instead, enter a future status of *Inactive* with a corresponding effective date of the status change and run the Change Item Status process.

The Change Item Status process ensures that items that are scheduled for inactivation meet system requirements for inactivation across PeopleSoft Supply Chain Management products.

If the item meets all requirements for inactivation, the Change Item Status process changes the current status to *Inactive*. Any items that are scheduled for inactivation that do not meet system requirements for inactivation are included on the Change Item Status Exception report.

You can change the future status of an item to *Inactive* at the business unit level on the Define Business Unit Item - General: Common page or at the setID level on the Define Item - General: Common page. To deactivate an item at the setID level, the Change Item Status process verifies that the item is defined as *Inactive* in all business units for which the item exists. If one business unit has the item with a status that is other than *Inactive*, the setID status change to *Inactive* does not take place. The Change Item Status exception report lists all the business units for which the status is not *Inactive*. You must explicitly change the business unit status to *Inactive* for these business units for the setID item status to be changed to *Inactive*. To deactivate the item only for a specific business unit, enter a future status of *Inactive* and a future status date on the Define Business Unit Item - General: Common page.

Important! Some items cannot be deactivated. If an item that is defined for a business unit is used in manufacturing on the Define Business Unit Item - General: Costing Page (Used for MFG option), it cannot be deactivated at the business unit or the setID level. If you set the future status of a used-for-manufacturing item to *Inactive*, an error message appears.

Requirements for SetID Item Inactivation

The Change Item Status process validates that the setID item is eligible for *Inactive* status. To be eligible for *Inactive* status, the status for the item in each referenced business unit must be *Inactive*.

Requirements for Business Unit Item Inactivation

The Change Item Status process validates that the business unit item is eligible for *Inactive* status. To be eligible for *Inactive* status, these conditions must be met in each of the PeopleSoft Supply Chain Management applications that the system includes:

- PeopleSoft Inventory.
 - No non-shipped demand for the item exists in the inventory business unit.
 - No un-interfaced replenishment requests for the item exist in the inventory business unit.
 - No staged receipts or in-transit transactions exist for the item.
 - No par locations in the inventory business unit define the item as a stock item.
- PeopleSoft Purchasing (for Purchasing transactions that reference the inventory business unit of the item that is scheduled for inactivation).
 - No open requisitions exist for the item.
 - No open purchase orders exist for the item.
 - No contract lines reference the item.
 - No open RFQs (requests for quotes) exist for the item.
 - No incomplete PO Build (purchase order) records exist for the item.
 - No un-interfaced receipts exist for the item.
 - No planned orders that are not sourced exist for the item.
- PeopleSoft Order Management.

No open sales orders that are to be sourced from the inventory business unit include the item.
- PeopleSoft Manufacturing (for Manufacturing transactions that reference the manufacturing business unit and the inventory business unit of the item that is scheduled for inactivation)
 - No BOMs exist where the item is an assembly or a component of the assembly.
 - No routing definitions exist for the item.
 - No production areas have the item that you want to deactivate assigned to them.
 - No production IDs or production schedules exist for the item.

See Also

[Chapter 2, “Working With Items,” Defining Item Status, page 7](#)

Using Item Prompting

To help keep large item masters manageable at the transaction level, PeopleSoft item prompts are designed to display only items that are valid for the transaction that you are performing. Items are filtered by status of the item at the business unit level. If the status of an item does not meet the status requirement of the transaction, the item is not included in the values that are accessed from the item ID field on the transaction page.

See Also

[Chapter 2, “Working With Items,” Defining Item Status, page 7](#)

Fulfilling Orders With Substitute Items

This section lists common elements and discusses how to:

- Create item substitution definitions.
- View substitution options from item available inquiries.
- View an item’s substitution definition at the setID level.
- View an item’s substitution definition at the business unit level.
- Enable item substitutions for an order line.
- Use item substitutions during picking.

When sufficient quantity of a requested item is unavailable, companies often fill the order by using an appropriate substitute item. PeopleSoft offers support for this business practice both at the time of order entry and at the time that the order is picked. If an item is unavailable, you can quickly access a list of appropriate substitutes at the time of order entry and suggest an alternative to the customer. Additionally, you can print a list of substitute items on the picking plan for orders that permit substitutions, enabling the picking staff to make substitutions as required.

See Also

PeopleSoft Manufacturing 8.8 PeopleBook, “Understanding PeopleSoft Manufacturing,” Item Substitution

PeopleSoft Purchasing 8.8 PeopleBook, “Using Purchase Order Sourcing,” Manually Selecting Requisitions for Sourcing

PeopleSoft Working with Customers and Orders 8.8 PeopleBook, “Setting Up Products,” Establishing Product Alternates

Common Elements Used in This Section

Priority

The substitute item with the highest priority (the lowest number) is substituted first. Priority doesn’t need to be sequential, though it must be greater than zero. PeopleSoft applications display, print, and suggest substitute options in priority order.

Start Date and End Date	Indicates when the substitute item becomes or ceases to be a valid substitution option.
Sub Item (substitute item)	The Item ID and item Description of the substitute item appear.

Pages Used to Fulfill Orders With Substitute Items

Page Name	Object Name	Navigation	Usage
Substitute Items (setID level)	INV_SUB_ITEM_SEC	Enter an item ID on the Availability Inquiry Selection page (Inventory, Manage Inventory, Review Inventory Balance Info, Item/Product Availability) and click the Item Search/Item Links button next to the item ID field. Then click the Substitute Items link.	View an item's substitution definition at the setID level and, if appropriate, select an alternate item.
Substitute Items (business unit level)	INV_BU_SUB_ITM_SEC	To access the Substitute Items page, enter an item ID on the pages in the Material Stock Request component or the Express Issue page, and click the Transfer button next to the Item ID field. On the Transfer page, click the Substitute Items link.	Use the Substitute Items page to view an item's substitution definition at the business unit level, and if appropriate, select an alternate item.

Creating Item Substitution Definitions

If you want to make item substitutions either at the time of order entry or as the order is physically picked, you must first create item substitution definitions. An item substitution definition specifies what items can replace the originally requested item.

To create an item substitution definition:

1. Define substitute items at the setID level.

When you define an item at the setID level, you can also define appropriate substitutions for the item on the Define Item - Substitutes page. For each substitute item, define these fields:

- The substitute item's priority relative to other substitute options.
- A start and end date specifying when the substitution is valid.
- A conversion rate in the standard UOM specifying how many substitute items are required to replace the originally requested item.

- The transactions areas for which the substitute item is valid: shipments, manufacturing, or procurement.

Implementation tip: Use the Substitute Item page to create the broadest substitution definition that is possible and then restrict the definition at the business unit. The substitution definition that is established for the setID can be modified to meet the requirements of the business unit on the Define Business Unit Item - Substitutes page. However, you cannot add substitute items to the substitution definition at the business unit level unless they are previously defined for the setID. At the business unit level, you can only remove substitute items from the substitution definition or modify their attributes. Any items that are included in the substitution definition at the setID level that are not defined for the business unit are automatically excluded from the substitution definition at the business unit level.

You can copy the item substitution definition at the setID level to the business unit level. For established business units, you can copy the item substitution definition from the setID to existing business units by using the Copy to Business Unit link on the Substitute Item page. Only substitution definitions for items that are defined in the business unit are copied. You can use the Copy Substitutes option on the Item Copy page to copy items within a setID.

2. (Optional) Modify the item substitution definition for the business unit.

Use the Define Business Unit Item - Substitutes page to modify the substitution definition that is created for the setID to meet the needs of a given business unit. For example, one of the business units no longer stock one of the items that is defined as a valid substitute. In this case, you can delete the item from the substitution definition at the business unit level. If an item can be used as a substitute for shipments in one business unit but not in another, the Use for Shipments option can be changed accordingly. You can copy the setID's item substitution definition to the business unit by using the Copy to Business Unit link on the Define Item - Substitutes page or the Copy SetID Substitutes link on the Define Business Unit Item - Substitutes page.

Viewing Substitution Options From Item Availability Inquiries

When viewing item availability, you can quickly check availability for any substitutes that are defined for an item. In PeopleSoft Order Management, you can view possible item substitutions for an order line to help you decide whether to allow item substitutions during fulfillment processing. In PeopleSoft Inventory, you can view and select valid item substitutions when creating material stock requests and express issues.

The ability to view substitution options is provided on the Availability Inquiry Selection page, the Express Issue page, and all pages that are in the Material Stock Request component. To view an item's substitution definition from these pages, enter an item ID and click the Transfer button that is next to the item ID field. On the Transfer page, click the Substitute Items link to access the Substitute Items page. Depending on the point of access, you view the item's substitution definition at either the setID or business unit level.

Viewing an Item's Substitution Definition at the SetID Level

Access the Substitute Items page.

Substitute Items																													
SetID:	SHARE	Item ID:	GR8000																										
Gear, Sugishita																													
Customize Find View All First 1 of 1 Last																													
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Substitute Item</th> <th style="width: 10%;">Usage</th> <th colspan="6"></th> </tr> <tr> <th></th> <th></th> <th style="width: 15%;">Priority</th> <th style="width: 15%;">Sub Item</th> <th style="width: 20%;">Description</th> <th style="width: 10%;">Start Date</th> <th style="width: 10%;">End Date</th> <th style="width: 10%;">Conversion Rate</th> <th style="width: 10%;">Std UOM</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>1</td> <td>GR8001</td> <td></td> <td></td> <td>01/01/2000</td> <td>12/31/2099</td> <td>1.00000000</td> <td></td> </tr> </tbody> </table>				Substitute Item	Usage									Priority	Sub Item	Description	Start Date	End Date	Conversion Rate	Std UOM	<input type="checkbox"/>	1	GR8001			01/01/2000	12/31/2099	1.00000000	
Substitute Item	Usage																												
		Priority	Sub Item	Description	Start Date	End Date	Conversion Rate	Std UOM																					
<input type="checkbox"/>	1	GR8001			01/01/2000	12/31/2099	1.00000000																						

Substitute Items page (SetID)

The Substitute Items page shares the same object name as the Copy Set ID Substitute Items page.

Click the Return button to close the page without selecting a substitution.

Select the check box on the row of a substitute item if you want to populate the item ID field on the previous page with the substitute item's item ID.

Conversion Rate Specifies the factor to convert the transaction quantity to the item's standard UOM.

Note. The conversion rate can be different at the setID, business unit, and BOM levels.

Use for Shipments Indicates whether the substitute item is valid for picking for sales orders and material stock requests.

Use for Manufacturing Indicates whether the substitute item can be used for substitutions on BOMs or production picking plans.

Use for Procurement Indicates whether the substitute item can be used for substitutions during online sourcing in PeopleSoft Purchasing. This value is not copied to the business unit because PeopleSoft Purchasing only uses the substitution definition from the setID level.

See Also

[Chapter 4, “Defining Items,” Substituting Items, page 115](#)

PeopleSoft Manufacturing 8.8 PeopleBook, “Understanding PeopleSoft Manufacturing,” Item Substitution

PeopleSoft Purchasing 8.8 PeopleBook, “Using Purchase Order Sourcing,” Pages Used to Manually Select Requisitions for Sourcing

Viewing an Item's Substitution Definition at the Business Unit Level

Access the Substitute Items page.

Substitute Items											
Unit:	US008										
Item ID:	GR8000 Gear, Sugishita										
Std UOM: EA											
<div style="text-align: right; margin-right: 10px;"> Customize Find View All </div> <div style="display: flex; justify-content: space-between; align-items: center;"> First 1 of 1 Last </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Priority</th> <th style="width: 20%;">Sub Item</th> <th style="width: 40%;">Description</th> <th style="width: 10%;">Conversion Rate</th> <th style="width: 10%;">Std UOM</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;">1 GR8001</td> <td>Gear, Campani</td> <td style="text-align: center;">1.00000000</td> <td style="text-align: center;">EA</td> </tr> </tbody> </table>		Priority	Sub Item	Description	Conversion Rate	Std UOM	<input type="checkbox"/>	1 GR8001	Gear, Campani	1.00000000	EA
Priority	Sub Item	Description	Conversion Rate	Std UOM							
<input type="checkbox"/>	1 GR8001	Gear, Campani	1.00000000	EA							

Substitute Items page (business unit)

Click the Return button to close the page without selecting a substitution.

Select the check box on the row of a substitute item if you want to populate the item ID field on the previous page with the substitute item's item ID.

Note. The Substitute Items link is not available for a vendor return request type on the Express Issue page. Substitutions are not permitted for vendor returns.

For each substitution option, the system displays this information:

Conversion Rate	Specifies the factor to convert the transaction quantity to the item's standard UOM.
------------------------	--

Note. The conversion rate can be different at the setID, business unit, and BOM levels.

Enabling Item Substitutions for an Order Line

For eligible order lines, item substitutions can be made during order fulfillment and recorded on the Picking Feedback page. An order line is eligible for item substitution only if these conditions are met:

- The Allow Item Substitutes option for the order line is selected.

You can make substitutions only at the time of picking for order lines that permit substitution. To enable substitutions on a sales order, select the Allow Item Substitutes option on the Sold-To Data page, which is used as a default in sales orders in PeopleSoft Order Management. You can change this setting until a substitution is recorded for the order line on the Picking Feedback page or until the order line is shipped. After the order line is added to a pick batch ID and before the order line is shipped, you must duplicate any changes that you made to the Allow Item Substitutes setting on the sales order pages on the Maintain Stock Request page in PeopleSoft Inventory. Changes that are made to order line attributes in PeopleSoft Order Management after the order line appears on a pick plan are not replicated automatically.

For stock requests that are created by using the Material Stock Request component, the Express Issue pages, or the PO Sourcing process, the Allow Item Substitutes setting appears by default from the Fulfillment Item Setup page, if defined, or the Fulfillment Setup page. The Allow Item Substitutes setting on stock requests that is created by the Par Location Replenishment process (INPGCDMD) and through planning messages has a default of disabled—substitutions are not allowed. You can override the Allow Item Substitutes setting for all non-sales order stock requests on the Maintain Stock Request page until the order line is shipped.

- The order line does not represent a return-to-vendor transaction, a backorder, a configured item, or a component of a kit.

Even for order lines that allow substitutions, substitutions are not permitted during picking for order lines representing configured items, items that are components of kits, and return-to-vendor transactions. In addition, you cannot make substitutions for any order lines for which backorders have been created by the Reserve Materials process (IPLDMND) or created as a result of short shipments.

- A valid substitution definition is in effect at the business unit for the requested item on the order line.

There must be an item substitution defined at the business unit level for the item on the order line. The picking plan that includes the order line must be generated between the start and end date that is defined for the substitute item that you select to fulfill the order line. Additionally, the substitute item must be valid for shipments; the Use for Shipments option must be selected on the item substitution definition.

- The full quantity on the order line is substituted.

On the Picking Feedback page, you must report picking enough quantity of the substitute item to completely fulfill the order line. You cannot partially fulfill an order line by using the requested item and complete the order by using a substitute item. The picked quantity must equal the requested quantity.

- The order line that is lot allocated is de-allocated prior to substitution.

Before you can record a substitution on the Picking Feedback page for an order line that is lot-allocated, you must first deallocate the lot. You can deallocate the lot from the sales order pages in PeopleSoft Order Management or from the Lot Allocation page in PeopleSoft Inventory.

- The order line that is associated with a shipping container or shipping serial ID is dissociated prior to substitution.

Before you can record a substitution on the Picking Feedback page for an order line that is assigned to a shipping container or shipping serial ID, you must dissociate the order line from the shipping container or shipping serial ID. In bar code environments, you can do this on the Ship Containers/Serials page using transactions 0624 or 0625 for shipping containers and transactions 0632 or 0633 for shipping serial IDs. You can also dissociate an order line from a shipping container by using the Packing Session component. Likewise, you can dissociate an order line from a shipping serial ID by deleting all shipping serial IDs for the order line on the Shipping/Issues - Ship Serial page.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Changing Orders,” Understanding Changing Orders

Using Item Substitutions During Picking

For order lines that allow substitutions, you can enable the picking staff to make substitution decisions when an order is physically picked from inventory storage locations. You can generate pick plans that include substitution options for each order line that permits substitutions, whenever the original item is in short supply. Even if the original item is available at the time of picking, the person who is picking the order can choose to pick any of the item’s predefined substitute items and record the substitution on the Picking Feedback page. With this method of substitution, you can complete fulfillment of orders that would otherwise be delayed or backordered.

If you choose to print substitutes, the Picking Plan process (INS6000) validates that each order line allows substitutions. If the Allow Item Substitute option is selected for the order line and there is not enough of the originally requested item to fulfill the order, the picking plan lists, in priority order, all of the valid substitute items that can be used to fulfill the order line. For each order line, substitute items are printed on the pick plan only if these conditions are met:

- The order line permits substitutions—that is, the Allow Item Substitutes option is selected.
- A substitution definition for the requested item is in effect for the item at the business unit level—that is, the date that the Picking Plan process is run falls between the start and end dates that are specified on the item substitution definition.
- The order line does not represent a return-to-vendor transaction or a backorder.
- The item that is on the order line is not a configured item or a component of a kit.
- The item substitution definition specifies that the substitution is valid for shipments—that is, the Use for Shipments option is selected for the item substitution definition.
- There is insufficient quantity of the originally requested item to fulfill the order line.
- There is sufficient quantity of the substitute item to completely fulfill the order line.
- The order line is not lot allocated.
- The order line is not associated with a shipping container or shipping serial ID.

Printing substitutions on the picking plan are not required for making substitutions during order fulfillment. The Picking Plan process does not actually make any substitutions; it lists valid substitution options for each order line. Even if the original item is unavailable, the Picking Plan process assigns the order line to the pick batch ID without allocating the stock in the storage location—a method that is functionally similar to creating a pull picking plan. This design enables you to select a substitute item on the Picking Feedback page without having to add an order line manually to the pick batch ID. Substitutions are made on the Picking Feedback page when you record the substitute item that you chose to replace the originally requested item.

See *PeopleSoft Manufacturing 8.8 PeopleBook*, “Issuing Material to Production”.

To use an item substitution during picking:

1. Select the Allow Item Substitutes option for the order line.

For sales orders, select the Allow Item Substitutes option on the Sales Order pages in PeopleSoft Order Management. For stock requests that are created by using the Material Stock Request pages, the Express Issue page, or the PO Sourcing process, the Allow Item Substitutes setting will default from the Fulfillment Item Setup Page, if defined, or the Setup Fulfillment - Fulfillment Setup page. The Allow Item Substitutes setting on stock requests that is created by the Par Location Replenishment process (INPGCDMD) and through planning messages has a default setting of disabled—substitutions are not allowed. You can override the Allow Item Substitutes setting for all non-sales order stock requests on the Maintain Stock Request page until the order line is shipped.

2. (Optional) Print substitution options on the picking plan.

To list item substitutes for order lines on the picking plan, select the Print Substitutes option on the Additional Options page, accessed from the Picking Plan report page. When you select this option, the picking plan lists the valid substitute items for each order line, plus the available quantity and storage location information (including lot and serial ID).

Printing substitute items on the pick plan is not a requirement for making an item substitution during fulfillment. For order lines that allow substitutions, you can record picking a valid substitute item for the order line on the Picking Feedback page without printing substitutes on the picking plan.

3. Pick a valid substitute item, if needed.

If a substitution is required for an item on the pick plan, you can physically pick one of the valid substitutes that are defined for the item. You must pick enough quantity of the substitute item to completely fulfill the requested quantity on the order line.

4. Record the substitution on the Picking Feedback page.

If you make an item substitution during picking, you must record the substitution on the Picking Feedback page. From the Picking Feedback page, you can access the Select Substitute Item page, where you can select the substitute item that you picked in place of the originally requested item. The quantity picked that you record must equal the quantity that is requested on the order line.

See Also

[Chapter 2, “Working With Items,” Enabling Item Substitutions for an Order Line, page 18](#)

Using UPNs

To define UPN setup parameters, type codes, and manufacturers, use the UPN Setup (ITM_MFG_UPN), UPM Type Code (UPN_TYPE_CD), and Manufacturer (MANUFACTURER) components. Use the ITM_MFG_UPN_CI component interface to load data into the tables for this component.

This section lists common elements and discusses how to:

- Define UPN type codes.
- Designate manufacturer default UPN type codes.
- Designate preferred manufacturers.
- Define UPN IDs.
- Designate vendors for use of UPNs.
- Locate UPNs.

PeopleSoft’s UPN feature enables you to associate UPNs with each UOM that is defined for a manufacturer, which in turn is associated with an Item ID (INV_ITEM_ID). UPNs are specific to each combination of unit of measure, manufacturer ID, and item ID. Because there are multiple UPN standards (for example, HIBC and UCC/EAN), however, you can actually assign more than one UPN for each UOM-manufacturer-item ID combination. You can display UPNs on dispatched purchase orders, change orders, and requisition hard copies, as well as on a variety of online documents.

To use UPNs, complete these steps:

- Define UPN type codes on the UPN Type Code page.
- Assign default UPN type codes on the Manufacturer page.

This is done because a manufacturer may use more than one type of UPN. Manufacturers typically use one type of UPN most of the time.

- Designate a preferred manufacturer for each item that needs a UPN.
- Define UPNs for UOM-manufacturer ID-item ID combinations on the UPN Setup page.
- Designate vendors that are ready to use UPNs on the Vendor Information - Procurement Options page.

Common Elements Used in This Section

UPN	The identifier (field name UPN_ID) that is assigned to a unique combination of item ID, manufacturer ID, and UOM.
UPN Type Code	Distinguishes among different UPN standards, such as HIBCC, UCC/EAN, or GTIN.

Pages Used to Set Up Universal Product Numbers

Page Name	Object Name	Navigation	Usage
UPN Type Code	UPN_TYPE_CD	Items, Define Controls, UPN Type Code, Upn Type Cd	Define UPN type codes at the setID level.
Manufacturer	MANUFACTURER	Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Manufacturer	Select a default UPN type code for a manufacturer.
Manufacturer's Item	ITM_MFG_SP	Items, Define Items and Attributes, Define Item, Manufacturers Item	Define information about the item's manufacturers and access the UPN Setup page and the Item Manufacturer GPO page.
UPN Setup	ITM_MFG_UPN	Items, Define Items and Attributes, Setup UPN, UPN Setup	Assign UPNs by item ID, manufacturer ID, and UOM. Before you can access this page, you must select and save a preferred (default) manufacturer on the Manufacturer's Item page.
Procurement Options	VNDR_PROC_OPT_SEC1	Vendors, Vendor Setup/Maintenance, Vendor Information. Click the Location tab, then click the Procurement Options link.	Indicate that a vendor uses UPNs. When the UPN Ready check box is selected, UPNs replace vendor item IDs or item descriptions on dispatched documents. UPNs appear in addition to, or instead of, vendor item IDs throughout the procurement process.

Defining UPN Type Codes

You must define a UPN type code for each setID for which you are using UPNs. The codes should correspond to the standards of UPN numbers that are used by the manufacturers of items that you want to procure.

To define UPN type codes for setIDs:

1. Access the UPN Type Code page.
2. Select a setID for which you want to assign a UPN type code.
3. Enter a code of four characters or fewer for the UPN type.

4. Click Add.
5. Enter a long description (required) and a short description.
6. Save the changes.

Designating Manufacturer Default UPN Type Codes

To designate a UPN type code as a default value for a manufacturer:

1. Access the Manufacturer page.
2. Enter or select a UPN type code in the UPN Default Type Code field.

The selection appears on the UPN Setup page.

Designating Preferred Manufacturers

You must designate a preferred manufacturer before assigning a UPN to an item ID-manufacturer ID-UOM combination, even if there is only one manufacturer on the Manufacturer's Item page. The preferred manufacturer's UPN appears by default on each page, listed under Viewing UPNs.

To designate a preferred manufacturer:

1. Access the Manufacturer's Item page.
2. Select a manufacturer ID.
3. Select the DFLT (default) check box in the row for the preferred manufacturer.
4. Click OK.

PeopleSoft displays the Define Item - General page.

5. Save the changes.

Note. PeopleSoft recommends that you assign only one manufacturer to an item ID if you want to track manufacturers in PeopleSoft Inventory. That is, items that are similar but made by different manufacturers should have separate item IDs.

Defining UPN IDs

To define a UPN for an item:

1. Access the Manufacturer's Item page.
2. Select the Selected Indicator check box in the row that is next to the manufacturer for which you want to assign a UPN.
3. Click the UPN Setup link.
4. Select a UOM and enter a UPN.

The default UPN type code comes from the Manufacturer page.

Designating Vendors for Use of UPNs

To designate vendors that are ready to use UPNs:

1. Access the Procurement Options page and select the UPN Ready check box.
2. Click OK and save the changes.

Once this option is selected and the rest of the UPN setup is complete, UPNs appear in place of or in addition to vendor item IDs throughout the procurement process.

Locating UPNs

The UPN ID field appears in addition to the vendor item ID on these pages:

- Item Details [Contract] (CNTRCT_ITM_DTL_SEC).
- Item Details [Contract Release] (CNTRCT_RLS_ITM_SEC).
- Change History – Change Lines (PO_CHANGE_LINE).
- Change Order Batch – Lines (PO_CHANGE_ORDER2).
- Line Details [Purchase Order] (PO_LINE_DTLS).
- Line Details [Purchase Order; inquiry] (PO_LINE_DTLS_INQ).
- Pick Purchase Order (PO_PICK_ORDERS).
- Acknowledgements – Header (PO_POA_HDRERR_STG).
- Acknowledgement Line Details (PO_POA_LN_COMPARE).
- Receiving – receipts Inquiry (RECV_INQ).
- Line Details – Details (REQ_INQ_LINE).
- Line Details (REQ_LINE_DETAILS).

You can dispatch or print these reports with UPNs displayed:

Document	Process Name	Usage
Purchase Orders and Change Orders.	PO Dispatch/Print SQR Process (POPO005).	UPN appears in place of Item Description. Dispatch purchase orders one at a time or in batches and updates statuses to <i>Dispatched</i> .
Requisitions.	Requisition Print SQR Report (PORQ010).	Print a hard copy of a requisition.

Using Device Tracking

You can use device tracking with PeopleSoft Purchasing to provide visibility into device tracked items throughout the procurement cycle. You can track both inventory and non-inventory items by selecting them in the item master. At the time of receipt, you can also track items that are ordered by description only.

An item that is designated for device tracking must be lot controlled, serialized, or both. If you select an item for tracking that is neither serialized nor lot controlled, you receive an error message. You can disable device tracking for an item in the item master at any time. The device tracking option appears for users during the procurement process.

You can use device tracking to:

- View and override information that is used to put items into PeopleSoft Inventory storage locations.
- Review tracking information during the procurement process.

Two reports are provided specifically for tracked devices. One displays tracked devices from the item master; the other displays tracked items that are received.

Reviewing Tracked Item Information

If an item is selected for device tracking, the Device Tracking check box is selected; otherwise the check box is clear. The Device Tracking check box appears on these pages:

Note. You can only select or clear the tracking option on the Define Item - Inventory: Tracking/Description page.

- Line Details (REQ_LINE_DETAILS).
- Line Details (PO_LINE_DTLS).
- Item Details (CNTRCT_ITM_DTL_SEC, CNTRCT_RLS_ITM_SEC).
- Receiving (RECV_WPO).
- Request for Quotes (RFQ_HDR).
- Line Details (REQ_INQ_LINE).
- Receipts (RECV_INQ).
- Request for Quotes (RFQ_HDR).
- Device Tracking Inquiry (RECV_INQ_DEVICE).

Displaying Device Tracking Information on Reports

You can produce these reports with device tracking information displayed:

Document	Process Name	Usage
Device Tracking Master List.	IN Device Tracking Item List (INS9030).	Displays device tracked items, filtered according to the parameters that are selected. See Appendix B, “PeopleSoft Item Reports,” page 177 .
P/O Receipt Device Tracking.	Device Tracking Receipts (PORC930).	Displays device tracked items that are received.

Pages Used to Track Devices

Page Name	Object Name	Navigation	Usage
Define Item - Inventory Tracking/Description	INV_ITEMS_DEFIN2	Items, Define Items and Attributes, Define Item, Inventory	Select an item for device tracking and establish or maintain item descriptions and lot-control attributes.
Receiving	RECV_WPO	Purchasing, Receipts, Add/Update Receipts	Create receipts for non-PO and PO line items.
Device Tracking	RECV_WPO_DEVICE	Purchasing, Receipts, Add/Update Receipts Click the DT Details button in an item row.	Review distribution information for a tracked device and assign serial IDs or lot IDs.

Selecting Items for Device Tracking

To select an item for Device Tracking:

1. Access the Define Item - Inventory: Tracking/Description page for the item that you want to track.
2. Select the Device Tracking check box.
3. Save the changes.

Note. You can only select items for tracking that are lot-controlled, serial-controlled, or both.

Receiving Tracked Devices

Access the Receiving page.

Serial Indicates whether the receipt line is serial controlled. The check box is selected and unavailable for serialized items. If you are receiving a description-only PO line (no item ID) and the Device Track check box is selected, the serial option can be selected. (You can also select this check box if the item is ordered using the description only and the line is asset related.) For serial-controlled items, you must enter the serial ID at the time of receipt, putaway, or during any inventory movement transaction.

Note. Do not select the Serial check box for items that are only lot-controlled.

Device Track Indicates whether a receipt line is device tracked. The default value is selected and unavailable for device-tracked items unless they are description-only (no item ID). The field is available for items that are description-only. Select to device track items that are description-only.

DT Details Click to access the Device Tracking page.

Accessing Tracked Device Distribution Information

Access the Device Tracking page.



Click the Insert Non-Serial Row button to split out the quantities to different lots or putaway locations. This generates another putaway row for the same inventory business unit. You must reduce the earlier putaway quantities for this unit if you split a putaway. The total putaway quantity for this unit must match the total quantity that you accept.



Click the Cancel Row button to cancel the selected row of the distribution line.

Distribution Information



Click the Assign Serial IDs button to access the Generate Serial Number page, where you can assign serial ID numbers to the selected receipt items. This page is accessible only if the related item is serial-controlled.



Click the Lot ID button to access the Generate Lot Numbers page, where you can assign a lot ID to a lot-controlled item. This page is accessible only if the related item is lot-controlled.

Note. Do not generate lot IDs for device-tracked items. Instead, enter the vendor-assigned lot ID in the Lot/Batch field or the Vendor Lot field.

Sel (select)

Select to work with a particular line item.

Dist Seq (distribution sequence)

Identifies the putaway row number that is associated with the specific distribution line.

IN Unit (inventory business unit)

Identifies the inventory business unit for the distribution. For non-PO receipts, this value defaults from the ship to location. For PO receipts, this value appears by default from the PO distribution.

Status

Status of the receipt line.

Serial/Component

Enter a serial ID. This field is available if the Serial Control check box is selected on the Define Item - Inventory: Tracking/Description page, or for items that are ordered by description if the Device Track and Serial check boxes are selected on the Receiving Page.

Lot/Batch

Enter a lot ID. This field is available if the Lot Control check box is selected on the Define Item - Inventory: Tracking/Description page, or if the Device Track check box is selected for description-only items on the Receiving page. The value that you enter becomes the default for the Vendor Lot field.

Vendor Lot

Enter a vendor-assigned lot ID. This field is available only if the Lot Control check box is selected on the Define Item - Inventory: Tracking/Description page.

Expire Dte

Enter the expiration date for the lot ID. This field is left blank if the item is a non-inventory receipt line (subcontract, expense only, or an asset-only interface receipt). The date here is unavailable for change if the item's lot ID is assigned an expiration date. If the item's lot ID doesn't have an assigned expiration date, the item's shelf life value (if greater than zero) is added to the receipt date to calculate the expiration date.

This expiration date value is available for override. If there is no shelf life value entered for the item, you are required to enter one.

Defining Custom Item Attributes

To capture item attributes that are specific to the business, PeopleSoft provides generic numeric and alphanumeric item attribute fields at both the setID and business unit level. By using PeopleSoft Application Designer, you can modify the field labels to represent their functions in the system.

As with other item attributes, custom attributes that you enter at the setID level automatically change to the business unit, where they can be modified. Custom attributes are updated by the Item Loader processes and can be copied by using the Item Copy page. Custom item attributes are included on the Basic Item Listing Report and in the Define Item outbound EIP (enterprise integration point). You can add these fields to existing reports or to custom reports.

For the set ID, define custom item attributes on the Define Item - Custom: Character page and the Define Item - Custom: Numeric page. The values that you define automatically change to the business unit level. You can modify these attributes on the Define Business Unit Item - Custom: Character page and Define Business Unit Item - Custom: Numeric page.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Application Designer

Using Item Quantity UOM

All PeopleSoft applications use UOMs to quantify resources. In PeopleSoft Inventory, they enable you to quantify and track inventory items. Suppose that you stock items in boxes of 12 and in cases of 60; the boxes and the cases are prepackaged; and you do not enable the warehouse personnel to break the packaging. You can stock item quantities in both these units of measure and track them as they move through the warehouse.

You can use different UOMs to conduct different types of transactions. For example, you might order an item by the case but store it in the warehouse and ship it to customers either by the box or as individual entities. You can track all of these transactions in the system by setting up quantity units of measure for ordering, stocking, and shipping, in addition to the required standard UOM. To facilitate processing, PeopleSoft maintains conversion rates between the standard UOM and the various other UOMs.

Standard UOM

The standard UOM represents the most common UOM for an item and should be the item's smallest valid unit of measure. The standard UOM must be valid for ordering, stocking, and shipping. Because PeopleSoft Inventory maintains item quantity on hand and costs in the standard UOM and uses this unit in quantity-on-hand and costing calculations, you cannot change the standard UOM once you perform transactions involving the item.

When you define an item's standard UOM on the Define Item - General: Common page, PeopleSoft Inventory automatically assigns a conversion rate of 1.000 for stocking, shipping, and ordering transactions. While you can modify conversion rates for the other UOMs that are defined for the item, you cannot override this base conversion rate.

Standard Pack Unit of Measure

Define a standard pack UOM if you consistently stock or ship items in packages of a specific size and type. For example, if you always ship pens in boxes of 12, you can define a box as having 12 each (the standard UOM), then define the standard pack UOM as a box. You define the standard pack UOM on the Define Business Unit Item - Inventory: Shipping/Handling page.

PeopleSoft Inventory uses the standard pack UOM to determine how many labels to generate when printing shipping carton and production completion labels. Suppose that you are shipping 10 boxes of the pens and you want to print one label per box. If you use the standard UOM (eaches), the label process prints 120 labels (one per pen); if you use the standard pack UOM (boxes), the process prints 10 labels (one per box).

Stocking UOM

The stocking UOM describes how you store quantities of an item in the warehouse. You can use the stocking UOM for a variety of transactions, including putaway, transfers, container management, adjustments, picking, and ordering.

When you assign UOMs to an item on the Units of Measure page, indicate whether each UOM is valid for ordering, shipping, or stocking transactions. If more than one UOM is valid for stocking, specify which of these should be the default stocking UOM. PeopleSoft automatically selects the standard UOM as the default stocking UOM, but you can change this value to any valid stocking UOM. The one exception is serial-controlled items, for which the only valid stocking UOM is the standard UOM. Each item can have only one default stocking UOM.

The Purchasing Receiving pages, the InterUnit and RMA Receiving pages, the Manual Staging page, and the Express Putaway page automatically use an item's default stocking UOM, but you can override the default and enter any valid stocking UOM for the item.

Note. Manufacturing Completions processes put stock away into PeopleSoft Inventory in the standard UOM only.

You can maintain multiple stocking UOMs for an item, but because you must identify the UOM for every transaction using the item, doing so requires that you track each UOM physically. To simplify warehouse operations, store the item in one UOM.

For example, suppose that Item A has a standard UOM of each (EA) and two stocking UOMs: each and case (CS). Assume that one CS equals 12 EA. To transfer all of Item A from one storage location to another, create two transactions—one to transfer the quantity that is stocked in EA and the second to transfer the quantity that is stocked in CS. If the picking plan calls for two cases of Item A to be picked, and you have 12 EA and one CS, create two picking feedback transactions—one to pick 12 EA and the second to pick one CS.

If, however, you define one stocking UOM for Item A, create only a single transaction for either of these material movements. You can still have an ordering UOM of CS, allowing you to order two CS. The difference is that you can enter a single picking feedback transaction by using the ordering UOM of CS. The system automatically converts to the single stocking UOM to find the correct quantity to fill the picking request.

Ordering UOM

Define an ordering UOM if you order quantities in a UOM that is other than the standard UOM. You can use the ordering UOM to create material stock requests, sales orders, and purchasing requisitions.

You cannot change the ordering UOM for an item if an open order containing the item exists in PeopleSoft Inventory.

Shipping UOM

Define a shipping UOM if you ship quantities in a UOM that is other than the standard UOM. The shipping UOM is used on the Packing Session pages and on the Shipping/Issues component.

You cannot change the shipping UOM for an item if an open order containing the item exists in PeopleSoft Inventory.

Rules for Deleting UOMs

Whenever you attempt to delete a UOM on the Units of Measure page in the Set Up Financials/Supply Chain - Common Definitions menu, PeopleSoft Inventory checks for these situations. If any of the conditions are not met, the system issues an error message and cancels the deletion.

- All UOMs: No item uses this UOM as a default stocking UOM.
- Stocking UOM: No quantity on hand or negative quantity exists in any storage location (the PHYSICAL_INV table) and no quantity exists in the putaway staging tables (STAGED_INF_INV and STAGED_ITEM_INV).
- Ordering UOM: No data exists in the ordering tables (DEMAND_INF_INV and DEMAND_INV) and no undepleted data exists in the Shipping Interface table (SHIP_INF_INV).
- Shipping UOM: No undepleted data exists in the Shipping Interface table (SHIP_INF_INV).

Using Units of Measure

This table illustrates which units of measure are used by PeopleSoft Inventory transaction pages.

Page	Valid Unit of Measure
Material Stock Request.	Ordering
Picking Feedback.	Stocking
Shipping/Issues.	Shipping
InterUnit and RMA Receiving.	Stocking
Express Putaway.	Stocking
Stockroom Feedback.	Stocking

Page	Valid Unit of Measure
Adjustments.	Stocking
Transfers.	Stocking
Container Management.	Stocking
Packing.	Shipping
Physical Accounting.	Stocking

Using UOMs With Electronic Data Collection Systems

The UOM Conversion Flag (unit of measure conversion flag), available on the Installation Options - Inventory page, the Inventory Options page, and the Define Item - Inventory: Shipping/Handling page, enables you to indicate how the electronic data collection system should handle UOMs. The option that you select on Installation Options defaults to the setID level and can be overridden on Inventory Options; the selection that you make on Inventory Options defaults to the business unit level and can be overridden on the Define Business Unit Item - Inventory: Shipping/Handling page. The electronic data collection background transactions use the settings on this final page.

You can set the conversion flag to process transactions in one of three ways:

- If you select *Convert to Standard UOM* (convert to the standard unit of measure), the system converts the UOM on incoming transactions to the item's standard UOM.

This gives you the ability to stock all of the inventory in the standard UOM and perform material movement transactions by using any valid UOM for the item.

- If you select *Convert to Default Stock UOM* (convert to the default stocking unit of measure), the system converts the UOM on incoming transactions to the default stocking UOM.
- If you select *Use Entered UOM*, the system processes transactions by using whatever UOM the user enters.

These transactions do not use the conversion flag in the standard manner:

- The shipping container and shipping serial transactions accept only the shipping UOM.

After verifying that the entered UOM is valid for shipping, the system processes the transaction by using that UOM.

- The interunit and purchase order receiving transactions use a receiving UOM rather than a putaway UOM and therefore accept any valid UOM for the item.

For these transactions, the system receives the item in the entered UOM, then stocks it in the default stocking UOM.

- Both the PeopleSoft Inventory and the Production Management picking feedback transactions take the original stocking UOM into account.

If the original stocking UOM is identified on the incoming transaction, the system automatically converts the picking UOM to the original stocking UOM; if the original stocking UOM is not identified, the system selects the conversion flag and uses it accordingly.

- The shipping notification transaction both picks and ships stock.

When picking, the system selects the conversion flag to determine which UOM to use; when shipping, it uses only the ordering UOM.

This table illustrates which UOMs are valid for each transaction type and each setting of the conversion flag.

Transaction	Use the Entered UOM	Convert to the Standard UOM	Convert to Default Stocking UOM
Picking.	Stocking.	Any valid UOM for the item.	Any valid UOM for the item.
Shipping Containers.	Shipping.	Shipping.	Shipping.
Putaway.	Stocking.	Any valid UOM for the item.	Any valid UOM for the item.
Transfers.	Stocking.	Any valid UOM for the item.	Any valid UOM for the item.
Adjustments.	Stocking.	Any valid UOM for the item.	Any valid UOM for the item.
Interunit Receipts.	Any valid UOM for the item.	Any valid UOM for the item.	Any valid UOM for the item.
Shipping Notification.	Stocking.	Any valid UOM for the item.	Any valid UOM for the item.
Purchase Order Receiving.	Any valid UOM for the item.	Any valid UOM for the item.	Any valid UOM for the item.
Kit Issues/Returns.	Standard.	Any valid UOM for the item.	Any valid UOM for the item.
Completions.	Standard.	Any valid UOM for the item.	Any valid UOM for the item.
Production Picking.	Stocking.	Any valid UOM for the item.	Any valid UOM for the item.

Examples: How to Use UOMs

These examples illustrate the concepts that are discussed in Understanding Item Unit of Measure. These examples do not encompass all possibilities for each transaction; they are designed to show how the different UOMs for an item can be used in PeopleSoft Inventory.

Using a Single Stocking UOM with Multiple Ordering and Shipping UOMs

For this example, assume that item MOD900 (a modem) has these UOMs and conversion rates:

UOM	Standard UOM	Vendor UOM	Stocking UOM	Ordering UOM	Shipping UOM
Each (EA)	1 EA		1 EA		1 EA
Case (CS)		100 EA		25 EA	25 EA
Pallet (PL)					100 EA

Receiving Transaction

You receive 10 CS of MOD900 using the vendor UOM of CS. This is different from the shipping UOM of CS: the vendor UOM of CS is 100 EA and the shipping UOM of CS is 25 EA.

Putaway Transaction

You put away 1,000 EA of MOD900 in Bin A using the standard UOM, the only valid stocking UOM for this item.

If you use an electronic data collection system, and you have selected the UOM Conversion Flag to convert the entered UOM to the standard UOM, you can also put away 40 CS or 10 PL. In either case, the system converts this quantity to the standard UOM of EA.

Transfer Transaction

You then transfer 50 EA of MOD900 from Bin A to Bin C using the stocking UOM.

If you use an electronic data collection system, and you select the UOM Conversion Flag to convert the entered UOM to the standard UOM, you can also transfer 2 CS or 0.5 PL from Bin A to Bin C. In either case, the system converts the quantity to the standard UOM of EA.

Material Stock Request Transaction

You enter a customer sales order for 8 CS of MOD900. You can also enter the quantity in the standard UOM (200 EA)—the system automatically converts this quantity to the ordering UOM (CS, in this example).

Picking Transaction

You pick 8 CS of MOD900 from Bin A. The Picking Feedback transaction automatically converts the 8 CS to a quantity of 200 EA. You can pick using the stocking, ordering, or standard UOM.

If you use an electronic data collection system and you have selected the UOM Conversion Flag to convert the entered UOM to the standard UOM, you can also pick in CS and the system automatically converts the quantity to EA.

Shipping/Issues Transaction

You ship 8 CS of MOD900 to the customer. You can also choose to ship 2 PL.

If you use the shipping containers electronic data transaction, you can ship in EA, CS, or PL, as these are all valid shipping UOMs for the item.

Using Multiple Stocking UOMs

For this example, assume that item COT100 (a cotton ball) has these UOMs and conversion rates:

Unit of Measure	Standard UOM	Stocking UOM
Each (EA)	1 EA	1 EA
Box (BX)		100 EA
Case (CS)		550 EA

In the hospital supply room, you issue cotton balls by the box of 100 cotton balls and by the case of 550 cotton balls. Boxes are issued to nurses' stations and cases are issued to departments.

The cotton balls are stocked separately in boxes of 100 or in cases of 550. You receive a shipment of cotton balls and put away 5 BX and 10 CS.

Someone comes to the supply room and requests 5 BX of cotton balls for the nurse's station in the department. When you issue the 5 BX, you are left with no boxes and 10 cases of COT100.

Someone else requests 2 boxes of COT100; you tell them you are out until the next shipment. You wouldn't issue 100 EA out of a CS because you don't want to break the case.

Another department requests 3 cases of cotton balls. When you give them the 3 CS, you are left with no BX and 7 CS.

Associating Items With UOMs

You set up relationships between items and UOMs at both the setID level and the business unit level.

To associate items with UOMs:

1. Establish UOMs for the setID.

Define UOMs on the Units of Measure page in the Set Up Financials/Supply Chain - Common Definitions menu. All UOMs must be defined here before they are available anywhere else in the system.

2. Define the standard UOM for each item within the setID.

Using the Define Item - General: Common page, assign each item a standard UOM that reflects the item's most common UOM.

Warning! To minimize rounding discrepancies when using multiple UOMs, use the smallest valid unit of measure for the item as the standard UOM.

3. Define additional UOMs for each item within the setID.

Using the Units of Measure page in the Define Items menu, define valid UOMs for ordering, stocking, and shipping each item. As part of this definition, identify the default stocking UOM, specify conversion rates between the standard UOM and the additional UOMs, and set up quantity precision rules for use in system calculations.

For each UOM, define corresponding stocking and shipping parameters on the UOM Weight/Volume page. To access this page, click the UOM Weight/Volume link on the Units of Measure page in the Define Items menu.

4. Define any UOM attributes that vary according to business unit.

Define a standard pack UOM on the Define Item - Inventory: Shipping/Handling page. This is the only UOM that you define at the business unit level rather than at the setID level.

If stocking, ordering, and shipping UOMs and their corresponding stocking and shipping parameters differ according to the business unit, define this information on the Define Business Unit Item - Inventory: Weight/Volume page.

See Also

[Chapter 2, “Working With Items,” Establishing Quantity Precision and Rounding Rules for Items, page 35](#)

Establishing Quantity Precision and Rounding Rules for Items

This section provides an overview of rounding exceptions and discusses how to:

- PeopleSoft Manufacturing.
- Set up quantity precision and rounding rules.

Quantity Precision

Quantity precision rules enable you to indicate whether entered and calculated quantities for an item-UOM combination should be expressed as whole numbers or decimals. If you specify a whole number quantity precision, all quantities involving the item-UOM combination are stored in the database and appear on pages and reports as whole numbers. Zeros still appear in the decimal places, however, so that you see 5.0000 rather than 5. If you specify a decimal quantity precision, quantities are stored and appear as decimals that are carried out to four places.

Quantity precision is set at the inventory setID and item-UOM levels and is defined on the Units of Measure page in the Define Items menu.

Whenever you enter a quantity for an item-UOM combination, PeopleSoft verifies whether the entry conforms to the quantity precision rules that you specify. If you enter a decimal value for a combination requiring whole numbers, an error message appears. For example, if the EA UOM is defined for whole numbers, you cannot enter a quantity of 1.5 EA.

You can always change a whole number precision to a decimal precision, but you cannot always change a decimal precision to a whole number precision. Once you complete certain transactions involving the item—any putaway operation, any order placed against the item, or any adjustment—you cannot make this change.

See [Chapter 2, “Working With Items,” Setting Up Quantity Precision and Rounding Rules, page 38.](#)

Rounding Rules

Whenever you define a whole number quantity precision on the Unit of Measure page, you associate a rounding rule with that item-UOM combination. Rounding rules enable you to determine the direction in which fractional quantities are rounded so that calculations involving the item result in whole numbers. You have two options:

- Natural round

Fractional values that are greater than or equal to 0.5 are rounded up to the nearest integer, and fractional values that are less than 0.5 are rounded down to the nearest integer.

- Round up

Fractional values are rounded up to the nearest integer.

To change the rounding rules for an item at any time, return to the Unit of Measure page and select a different option.

Note. Calculations that are performed by using the natural round option can produce rounded quantities of 0. For example, the calculated quantity 0.2500 rounds down to 0 rather than up to 1. When establishing the rounding rules, select the round up option to ensure that the system never rounds to 0.

See [Chapter 2, “Working With Items,” Understanding Rounding Exceptions, page 37.](#)

Automatic UOM Rounding

The Automatic UOM Round option on the Business Unit Related - Inventory Definition page enables you to indicate whether entered fractional quantities should be rounded automatically during UOM conversions. Whenever a PeopleSoft application performs a UOM conversion, it uses the specified rounding rule in conjunction with the automatic rounding option that you select here to determine how to process these quantities.

Depending on how you set the automatic rounding flag, PeopleSoft handles automatic rounding in one of three ways:

- Generates a warning.

The system suggests a new quantity to replace the entered quantity. If you accept the suggested value, processing continues; if you reject it, the system displays an error message and stops processing the transaction.

Note. Because batch processes do not produce online messages, the system treats this option differently when running in batch: it creates a hard error and stops conversion processing.

- Generates an error message.

The system displays an error message and stops conversion processing. You must enter a different quantity before processing can resume.

- Performs automatic rounding without generating a message.

The system automatically replaces the entered quantity with the new value.

Note. A UOM conversion that necessitates changing a quantity that is already stored in the database always results in an error, no matter which automatic rounding option you select.

This example illustrates the principles that are behind automatic rounding. Suppose that you maintain item A in two different UOMs: the standard UOM is each (EA) and the stocking UOM is cases (CS). Assume that cases can exist in fractional quantities but EA must be whole numbers, you have selected the natural round rule, and the conversion factor is 6 EA to 1 CS. Suppose that you enter an order for 0.3331 CS of the item. Because PeopleSoft Inventory conducts transactions in the standard UOM, the request for 0.3331 CS is converted to 2 EA (rounded according to the rules that you specify). To maintain data integrity within the system, the originally entered quantity must be revalidated. When the rounded quantity of eaches is reconverted to cases, the resulting value requires the original quantity to be changed from 0.3331 CS to 0.3333 CS.

Understanding Rounding Exceptions

Certain situations exist in both PeopleSoft Purchasing and Manufacturing in which rounding differs from the standard functionality.

PeopleSoft Purchasing

If the installation includes PeopleSoft Purchasing, you can override the defined quantity precision rules on the Vendor's UOM & Pricing Info page.

If you specify a whole number quantity precision, the Build Inv Demand from Stage (build inventory demand from stage) process (PO_REQINVS) automatically rounds to whole numbers after calculating the transfer yield (defined on the Define Business Unit Item - Planning: Order Modifiers page). If a rounding error occurs, the process stops the creation of inventory demand and creates a purchase order instead.

During purchase order sourcing, the system applies to the largest distribution any differences that are from rounding. Rounding differences are usually small enough that updating the source documents (requisitions and planned purchase orders, for example) to reflect these discrepancies is not necessary.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, “Using Purchase Order Sourcing,” Building Inventory Demand Transactions

PeopleSoft Purchasing 8.8 PeopleBook, “Using Purchase Order Sourcing,” Understanding the Purchase Order Sourcing Business Process

PeopleSoft Manufacturing

PeopleSoft Manufacturing does not use the standard rounding rules in three types of transactions:

- Quantity per assembly.
- Cost roll-up process.
- Component demand.

See Also

PeopleSoft Manufacturing 8.8 PeopleBook, “Understanding PeopleSoft Manufacturing,” Rounding Rules in Manufacturing

Setting Up Quantity Precision and Rounding Rules

When you establish items and UOMs for the business, define quantity precision and rounding rules for use in system transactions and calculations. These rules govern the manner in which PeopleSoft applications process entered and calculated quantities.

To set up quantity precision and rounding rules:

1. Define quantity precision and rounding rules for the setID.

On the Units of Measure page in the Define Items menu, specify whether quantities for each item-UOM combination should be expressed as whole numbers or as decimals.

If you specify a whole number quantity precision, select a rounding rule (either round up or natural round) to indicate how calculated quantities should be rounded so that they result in whole numbers.

2. Define automatic rounding rules for UOM conversions.

On the Business Unit Related - Inventory Definition page, select an automatic rounding option to indicate whether the system should generate warnings, generate error messages, or round quantities automatically during UOM conversions.

See Also

[Chapter 2, “Working With Items,” Establishing Quantity Precision and Rounding Rules for Items, page 35](#)

Viewing Item Information

This section describes how to view item information.

Pages Used to View Item information

Page Name	Object Name	Navigation	Usage
Item Brand Names (inquiry)	BRND_NAME_INQ_INV	Items, Review Item Information, Item Brand Names	View brand names that are associated with an item and the periods for which the brand names are valid.
Items - General: Common (inquiry)	NV_ITEMS_DEFIN1	Items, Review Item Information, Items, General Items, Define Items and Attributes, Define Item, General	View the item attributes that are defined on the Define Item - General: Common page.

Page Name	Object Name	Navigation	Usage
Items - General: Classifications	INV_ITEMS_DEFIN4	Items, Review Item Information, Items, General Items, Define Items and Attributes, Define Item, General	View the item attributes that are defined on the Define Item - General: Classifications page.
Items - General: Dimensions (inquiry)	INV_ITEMS_DEFIN3	Items, Review Item Information, Items, General Items, Define Items and Attributes, Define Item, General	View the item attributes that are defined on the Define Item - General: Dimensions page.
Items - General: Usage (inquiry)	INV_ITEMS_DEFIN8	Items, Review Item Information, Items, General Items, Define Items and Attributes, Define Item, General	View the item attributes that are defined on the Define Item - General: Usage page.
Items - Inventory: Tracking/Description (inquiry)	INV_ITEMS_DEFIN2	Items, Review Item Information, Items, Inventory Items, Define Items and Attributes, Define Item, Inventory	View the item attributes that are defined on the Define Item - Inventory: Tracking/Description page.
Items - Inventory: Shipping/Handling (inquiry)	INV_ITEMS_DEFIN5	Items, Review Item Information, Items, Inventory Items, Define Items and Attributes, Define Item, Inventory	View the item attributes that are defined on the Define Item - Inventory: Shipping/Handling page.
Items - Substitutes (inquiry)	INV_ITEMS_DEFIN7	Items, Review Item Information, Items, Substitutes Items, Define Items and Attributes, Define Item, Substitutes	Use the page to view the item attributes that are defined on the Define Item - Substitutes page.
Items - Configuration (inquiry)	INV_ITEMS_DEFIN6	Items, Review Item Information, Items, Configuration Items, Define Items and Attributes, Define Item, Configuration	Use the page to view the item attributes that are defined on the Define Item - Configuration page.
Items - Custom: Character (inquiry)	INV_ITEMS_DEFIN9	Items, Review Item Information, Items, Custom Items, Define Items and Attributes, Define Item, Custom	View the item attributes that are defined on the Define Item - Custom: Character page.

Page Name	Object Name	Navigation	Usage
Define Item - Custom: Numeric	INV_ITEMS_DEFIN10	Items, Review Item Information, Items, Custom Items, Define Items and Attributes, Define Item, Custom	View the item attributes that are defined on the Define Item - Custom: Numeric page.
Items - Audit (inquiry)	INV_ITEM_HDR_INQ	Items, Review Item Information, Items, Audit Items, Define Items and Attributes, Define Item, Audit	View information about when the item was defined for the setID and when the setID definition was last modified.
Catalog - Catalog Inquiry	CATALOG_INQUIRY	Items, Review Item Information, Catalog, Catalog Inquiry	View item information in the purchasing catalogs.
Item Category Detail (inquiry)	ITM_CAT_DETAIL	Select an item and click the Item Details link on the Catalog - Catalog Inquiry page.	View details about a selected item, including availability, standard pricing, and lead time.
Item Vendor Priority (inquiry)	ITM_CAT_VNDR	Click the Item Vendor link on the Catalog - Catalog Inquiry page.	View vendor information such as status and priority.
Substitute Items (inquiry)	ITM_SUB_PNL	Click the Substitute Items link on the Catalog - Catalog Inquiry page.	View substitutes that are established for an item.
Default Putaway Locations (inquiry)	DEFALT_LOC_INQ_INV	Inventory, Maintain Storage Locations, Review Default Putaway Loc	View all of the default putaway locations for items that are defined by using the Default Putaway Locations page.
Fixed Picking Locations (inquiry)	FIXED_LOC_BIN_INQ	Inventory, Maintain Storage Locations, Review Fixed Picking Locations, Fixed Picking Locations	View all of the fixed picking locations that are defined for an item by using the Fixed Picking Locations page.

Viewing Item Definition and Item Change Information

Access the Audit page.

Note. Once the item's setID definition record is approved, the fields that are in the Last Item Approval Change group box are not updated. When the item definition is approved, the item status is set to *Active*. This group box does not reflect post-approval status updates such as *Hold*, *Inactive*, or *Discontinue*.

Approval Date Indicates the date that the status in the Item Status Approval field was implemented (that is, the date that the item's setID definition was set to *Under Initialization*, *Pending Approval*, *Denied Approval*, or *Approved*).

Approval User ID Indicates the ID of the user who triggered the status change that is reflected in the Item Status Approval field. For example, for an enterprise that requires

manual approval, this field indicates the ID of the person who approved or denied the item definition on the Item Approval page. For an enterprise that automatically approves item definitions, this field indicates the ID of the person who changes the item status from *Under Initialization* to *Pending Approval* on the Define Item – General: Common page.

See Also

[Chapter 2, “Working With Items.” Managing Inventory by Item Status, page 6](#)

Using Enterprise Integration Points for Items

This section discusses how to:

- Send outbound messages with the Item Master EIP.
- Send item information to PeopleSoft CRM.
- Receive inbound messages with the Item Master EIP and the Item Price List EIP.

PeopleSoft provides three enterprise integration points (EIPs)—the Item Price List EIP, the Item Master EIP, and the CRM Item Sync EIP—that enable you to synchronize item data with third-party systems. With the Item Price List EIP, you can receive item price list data that is published by third-party sources or load this information from a flat file. With the CRM Item Sync EIP, you can send item records to PeopleSoft CRM.

See Also

[Chapter 2, “Working With Items,” Sending Item Information to PeopleSoft CRM, page 49](#)

[Chapter 5, “Loading Items,” page 121](#)

http://www.peoplesoft.com/corp/en/products/technology/oif/eip_catalog.jsp

PeopleSoft Enterprise Components, “Understanding Enterprise Integration Points”

Sending Outbound Messages With the Item Master EIP

With the Item Master EIP, you can send and receive complete item records.

The Item Master EIP includes four XML-based application messages: ITEM_SYNC, ITEM_SYNC_EFF, ITEM_FULLSYNC, and ITEM_FULLSYNC_EFF. Activate the ITEM_SYNC message to publish incremental updates automatically as item information is updated online or by using the Change Item Status process (INS4000), Item Loader process (IN_ITMLOAD) or Publish Outbound Message process. Activate the ITEM_FULLSYNC message to perform full data replication by scheduling a batch process by using the Full Data Publish utility. This process generates an outbound application message containing all item information.

If you are publishing item data to a third-party system that cannot process effective-dated rows, activate the _EFF version of either the ITEM_SYNC or ITEM_FULLSYNC application message. When you publish item updates by using the _EFF application messages, future-dated segments of the message are removed from the outbound message and published when the effective date equals the current date.

When you activate the ITEM_SYNC or ITEMSYNC_EFF application message, outbound item information is generated from these 10 points within the PeopleSoft system as approved items are being maintained:

- Define Item component.
- Purchasing Attributes component.
- Approve Item component.
- Define Business Unit Item component.
- Units of Measure component.
- Copy Item component.
- Revision Maintenance component.
- BOM Mass Maintenance by MMC.

Note. To publish the application message for BOM Mass Maintenance by MMC or by ECO, run both the ENPMMAIN COBOL process and the Publish Outbound Message (Item Revision option) process.

- BOM Mass Maintenance by ECO
- Item Loader process (IN_ITMLOAD)

See *PeopleSoft Enterprise Components*, “Assigning Publishing Rules”.

See *PeopleSoft Supply Chain Management Integration 8.8 PeopleBook*, “Managing PeopleSoft Supply Chain Management Integration Points,” Processing Outbound Application Message Transactions.

See *PeopleSoft Supply Chain Management Integration 8.8 PeopleBook*, “Managing PeopleSoft Supply Chain Management Integration Points,” Publishing Outbound Messages.

See *PeopleSoft Enterprise Components*, “Activating Messaging EIPs”.

See *PeopleSoft Supply Chain Management Integration 8.8 PeopleBook*, “Understanding Warehouse Management Systems”.

Message Structure

The structure of the item messages is:

Segment	Parent	Valid Relationships	Source Table
Item Master.	None.		MASTER_ITEM_TBL
Item Detail.	Item Master.	1:1 on effective-dated messages or both 1:1 and 1:many on non-effective-dated messages.	INV_ITEMS
Item UOM.	Item Master.	1:1 or 1:many.	INV_ITEM_UOM

Segment	Parent	Valid Relationships	Source Table
Item Purchasing Attributes.	Item Master.	1:0 or 1:1.	PURCH_ITM_ATTR
Item Bus Unit Attributes.	Item Master.	1:0, 1:1, or 1:many.	BU_ITEMS_INV
Item Bus Unit Weight/Volume.	Item Bus Unit Attributes.	1:0 or 1:1, or 1:many.	BU_ITEMS_WTVOL
Item Revision.	Item Bus Unit Attributes.	1:0, 1:1, or 1:many.	EN_REVISION

Message Segments

The segments that are delivered in each of the item messages vary depending on the source of the message. The tables that are provided under each of the data sources show the segments that are delivered based on the function that is being performed.

- The parent segment is always included on the message.

If the parent segment does not have a PSCAMA record, or if it does have a PSCAMA record with a blank audit action code, then no modifications are made to the parent segment. In this case, the parent is included only for reference purposes.

- The message is published if any fields for a source record are altered on any of the pages that are listed.

The audit action code on the PSCAMA record is set to the appropriate code based on the action that is being performed (add, change, or delete). Because all fields of the source record are not sent on the message, there may be cases where messages are published even though none of the fields on the message have been modified. The logic that determines whether or not to publish a message only checks that the source record has been altered. It does not check field by field to determine whether or not the altered fields are on the message that is being published.

- Because the logic that publishes the message does not check field by field to determine whether a specific field has been altered, all fields that are on a segment are published if any field that is on the source record is altered.
- The item messages are only published for an item that has an *Approved* status.

Define Item Page

The page sends out various segments depending on the function that is being performed.

- Add mode with a status of *Approved*:

Segment	Audit Action	Comments and Data Rules
Item Master	A	Always published

Segment	Audit Action	Comments and Data Rules
Item Detail	A	Always published
Item UOM	A	Always published

- Update or Correction mode with an item that is saved with a new *Approved* status. Because an item message is never published until it is approved, all segments for the item are published when it is approved:

Segment	Audit Action	Comments and Data Rules
Item Master	A	Always published.
Item Detail	A	Always published.
Item UOM	A	Always published.
Item Purchasing Attributes	A	Published only if any exist.
Item Bus Unit Attributes	A	Published only if any exist.
Item Bus Unit Wgt/Vol	A	Published only if any exist.
Item Revision	A	Published only if any exist.

- Update or Correction mode with a previously approved item:

Segment	Audit Action	Comments and Data Rules
Item Master	C or space	Always published.
Item Detail	C, D or space	Only published if a field from the ITEM_INV table is modified.

Item UOM Page

Segment	Audit Action	Comments and Data Rules
Item Master	Space	Always published.
Item UOM	A, C or D	Always published.

Purchasing Attributes Page

Segment	Audit Action	Comments and Data Rules
Item Master	Space	Always published
Item Purchasing Attributes	A or C	Always published

Define Business Unit Item Page

You can use Add or Update mode.

- Add mode: When the page is saved in Add mode, all segments for the Item message are published with an Audit Action Code of A.

Interfacing systems that are only taking an item message when the item is added to the business unit use this message to build all information for the item.

Interfacing systems that take item messages before a business unit is established update their item structures with the business unit level information:

Segment	Audit Action	Comments and Data Rules
Item Master	A	Always published.
Item Detail	A	Always published.
Item UOM	A	Always published.
Item Purchasing Attributes	A	Published only if it exists.
Item Bus Unit Attributes	A	Only the business unit being added is published. In this situation, the relationship between the Item Master Segment and the Item Bus Unit Attributes segment is always a one to one relationship.
Item Bus Unit Wgt/Vol	A	Published only if any exist.

- Update mode:

Segment	Audit Action	Comments and Data Rules
Item Master	Space	Always published.

Segment	Audit Action	Comments and Data Rules
Item Bus Unit Attributes	C or space	Only the business unit being changed is published. In this situation, the relationship between the Item Master Segment and the Item Bus Unit Attributes segment is always a one to one relationship.
Item Bus Unit Wgt/Vol	A, C or D	Only published if the BU_ITEMS_WTVOL is modified

Item Approval Page

Since an item message is never published until it is approved, all segments for the item are published when it is approved:

Segment	Audit Action	Comments and Data Rules
Item Master	A	Always published.
Item Detail	A	Always published.
Item UOM	A	Always published.
Item Purchasing Attributes	A	Published only if any exist.
Item Bus Unit Attributes	A	Published only if any exist.
Item Bus Unit Wgt/Vol	A	Published only if any exist.
Item Revision	A	Published only if any exist.

Item Copy Page

Segment	Audit Action	Comments and Data Rules
Item Master	A or space	Always published.
Item Detail	A	Published only if this segment is copied.
Item UOM	A	Published only if this segment is copied.

Segment	Audit Action	Comments and Data Rules
Item Purchasing Attributes	A	Published only if this segment is copied.
Item Bus Unit Attributes	A	Published only if this segment is copied.
Item Bus Unit Wgt/Vol	A	Published only if this segment is copied.

REV Maintenance

Segment	Audit Action	Comments and Data Rules
Item Master	Space	Always published.
Item Bus Unit Attributes	Space	Always published.
Item Bus Unit Wgt/Vol	A, C or D	Always published.

BOM Mass Maintenance by MMC and BOM Mass Maintenance by ECO

Segment	Audit Action	Comments and Data Rules
Item Master	Space	Always published.
Item Bus Unit Attributes	Space	Always published.
Item Bus Unit Wgt/Vol	A, C or D	Always published.

Item Loader Process

When adding a new item in an *Approved* status:

Segment	Audit Action	Comments and Data Rules
Item Master	A	Always published.
Item Detail	A	Always published.
Item UOM	A	Always published.

Segment	Audit Action	Comments and Data Rules
Item Purchasing Attributes	A	Published only if it exists.
Item Bus Unit Attributes	A	Published only if it exists.
Item Bus Unit Wgt/Vol	A	Published only if it exists.
Item Revision	A	Published only if it exists.

When updating an existing item that has reached an *Approved* status:

Segment	Audit Action	Comments and Data Rules
Item Master	C or space	Always published.
Item Detail	C or space	Published only if altered on inbound message.
Item UOM	A, C or space	Published only if altered on inbound message.
Item Purchasing Attributes	C or space	Published only if altered on inbound message.
Item Bus Unit Attributes	A, C or space	Published only if altered on inbound message.
Item Bus Unit Wgt/Vol	A, C or space	Published only if altered on inbound message.
Item Revision	A, C or space	Published only if altered on inbound message.

Full Data Publish

This function is used to copy all items in the database to an interfacing system, or if chunking is being used, to copy all items for a specific chunking value. In this case, all segments are published with an audit action code of A:

Segment	Audit Action	Comments and Data Rules
Item Master	A	Always published.
Item Detail	A	Always published.
Item UOM	A	Always published.
Item Purchasing Attributes	A	Published only if it exists.
Item Bus Unit Attributes	A	Published only if it exists.
Item Bus Unit Wgt/Vol	A	Published only if it exists.
Item Revision	A	Published only if it exists.

Sending Item Information to PeopleSoft CRM

If you are integrating with PeopleSoft CRM, you can use the CRM Item Sync EIP to synchronize item data in the CRM and PeopleSoft Inventory systems. The CRM Item Sync EIP includes two XML-based application messages, ITEM_CRM_FULLSYNC_EFF and ITEM_CRM_SYNC_EFF. Activate the ITEM_CRM_FULLSYNC_EFF message to publish a list of all items in PeopleSoft Inventory's Item Master table. The PeopleSoft CRM FieldService and Call Center applications use this message for initial population of their Item Master tables. Activate the ITEM_CRM_SYNC_EFF message to publish incremental updates automatically as item information is modified online or by the Item Loader process (IN_ITMLOAD). When you use the ITEM_CRM_SYNC_EFF message, you must also activate the internal ITEM_CRM_SYNC message. This message is not published to the PeopleSoft CRM system, but it is essential for ITEM_CRM_SYNC_EFF to work properly.

When you activate the ITEM_CRM_SYNC and ITEM_CRM_SYNC_EFF application messages, outbound item information is generated from these five points within the PeopleSoft system as approved items are being maintained:

- Define Item component.
- Approve Item component.
- Units of Measure component.
- Copy Item component.
- Item Loader process (IN_ITMLOAD).

See *PeopleSoft Supply Chain Management Integration 8.8 PeopleBook*, “Managing PeopleSoft Supply Chain Management Integration Points,” Publishing Outbound Messages.

See *PeopleSoft Enterprise Components*, “Understanding Enterprise Integration Points”.

See *PeopleSoft 8.8 CRM FieldService PeopleBook*

See *PeopleSoft 8.8 Call Center Applications PeopleBook*

Message Structure

The structure of the Item messages is:

Segment	Parent	Valid Relationships	Source Table
Item Master	(None)		MASTER_ITEM_TBL
Item Detail	Item Master	1:1 on effective-dated messages or both 1:1 and 1:many on non-effective dated messages.	INV_ITEMS
Item Substitute	Item Master	1:0, 1:1 or 1:many.	SUBSTITUTE_ITM
Item UOM	Item Master	1:1 or 1:many.	INV_ITEM_UOM
UOM Type	Item UOM	1:1 or 1:many.	UOM_TYPE_INV

Message Segments

The segments that are delivered in each of the item messages varies depending on the source of the message. The tables that are provided under each of the data sources that are listed show the segments delivered based on the function that is being performed.

- The parent segment is always included on the message.
If the parent segment does not have a PSCAMA record, or if it does have a PSCAMA record with a blank audit action code, then no modifications were made to the parent segment. In this case, the parent is included only for reference purposes.

- The message is published if any fields for a source record are altered on any of the pages that are listed.

The audit action code on the PSCAMA record is set to the appropriate code based on the action that is being performed. Because all fields on the source records are not sent on the message, there might be cases where messages are published even though none of the fields on the message have been modified. The logic that determines whether or not to publish a message only checks that the source record has been altered. It does not check field by field to determine whether or not the altered fields are on the message that is being published.

- Because the logic that publishes the message does not check field by field to determine if a specific field has been altered, all fields that are on a segment are published if any field on the source record is altered.
- The item messages are only published for an item that has an *Approved* status.

Define Item Page

The page sends out various segments depending on the function that is being performed.

- Add mode with a status of *Approved*:

Segment	Audit Action	Comments and Data Rules
Item Master	A	Always published.
Item Detail	A	Always published.
Item UOM	A	Always published.
UOM Type	A	Always published.
Item Substitute	A	Published only if any exist.

- Update or Correction mode with an item that is saved with a new *Approved* status. Because an item message is never published until it is approved, all segments for the item are published when it is approved:

Segment	Audit Action	Comments and Data Rules
Item Master	A	Always published.
Item Detail	A	Always published.
Item UOM	A	Always published.
UOM Type	A	Always published.
Item Substitute	A	Published only if any exist.

- Update or Correction mode with an item that was previously approved:

Segment	Audit Action	Comments and Data Rules
Item Master	C or space	Always published.
Item Detail	C, D or space	Only published if a field from the ITEM_INV table is modified.
Item Substitute	C, D	Only published if a field from the SUBSTITUTE_ITM table is modified.

Item UOM Page

Segment	Audit Action	Comments and Data Rules
Item Master	Space	Always published.
Item UOM	A, C or D	Always published.
UOM Type	A, C or D	Always published.

Item Approval Page

Since an item message is never published until it is approved, all segments for the item are published when it is approved:

Segment	Audit Action	Comments and Data Rules
Item Master	A	Always published.
Item Detail	A	Always published.
Item UOM	A	Always published.
UOM Type	A	Always published.
Item Substitute	A	Published only if any exist.

Item Copy Page

Segment	Audit Action	Comments and Data Rules
Item Master	A or space	Always published.
Item Detail	A	Published only if this segment is copied.
Item UOM	A	Published only if this segment is copied.

Segment	Audit Action	Comments and Data Rules
UOM Type	A	Published only if this segment is copied.
Item Substitute	A	Published only if any exist.

Item Loader Process

When adding a new item in an *Approved* status:

Segment	Audit Action	Comments and Data Rules
Item Master	A	Always published.
Item Detail	A	Always published.
Item UOM	A	Always published.
UOM Type	A	Always published.

When updating an existing item that has reached an *Approved* status:

Segment	Audit Action	Comments and Data Rules
Item Master	C or space	Always published.
Item Detail	C or space	Published only if altered on inbound message.
Item UOM	A, C or space	Published only if altered on inbound message.

Full Data Publish

This function is used to copy all items in the database to an interfacing system, or if chunking is being used, to copy all items for a specific chunking value. In this case, all segments are published with an audit action code of *A*:

Segment	Audit Action	Comments and Data Rules
Item Master	A	Always published.
Item Detail	A	Always published.
Item UOM	A	Always published.
UOM Type	A	Always published.

Receiving Inbound Messages With the Item Master EIP and the Item Price List EIP

You can receive inbound item data by using any of the four Item Master EIP application messages that are listed in the previous section. With the Item Price List EIP, you can receive item price list data that is published by third-party sources by subscribing to ITEM_PRICELIST_LOAD application message. The ITEM_PRICELIST_LOAD message supports requirements of the X.12 832 - Price/Sales transaction set.

Item records that are created from the application messages or flat file are inserted to the item loader staging tables for inbound processing. The Item Loader process validates the staged data, and if no errors are found, updates the PeopleSoft database. You can correct any errors that are flagged by the Item Loader process by using the Data Definition Maintenance component.

See Also

PeopleSoft Enterprise Components, “Understanding Enterprise Integration Points”

CHAPTER 3

Defining Item Control Values

This chapter provides an overview of item control values and discusses how to set definitions for item control values.

Understanding Item Control Values

With PeopleSoft Inventory, you can organize and group inventory items according to many different characteristics, or *attributes*. To set up item attributes, use the pages in the Define Controls component. Once defined, these attributes become selection options and defaults on pages used for defining new items.

Setting Definitions for Item Control Values

To define item family routings or item group routings, use the Item Family Routing Assignment or Item Group Routing Assignment components.

This section discusses how to:

- Define charge codes.
- Assign item default values.
- Assign items to item families.
- Assign items to groups.
- Define item numbering.
- Establish item templates.
- Group items in demand priority families.
- Define stocking periods.
- Define utilization types.
- Define utilization groups.

Pages Used to Define Item Control Values

Page Name	Object Name	Navigation	Usage
Brand Names	BRAND_NAMES_INV	Items, Define Controls, Brand Names	<p>To associate inventory items with brand names that are valid over specific time periods, use the Brand Names (PROD_BRAND_NAME) component. Brand names defined on this page are informational only and are not used by PeopleSoft Inventory.</p> <p>Note. If you select the Item Approval Required option on the Installation Options - Overall/GL (installation options - overall/general ledger) page, items must be approved before you can assign brand names.</p>
Charge Codes	CHARGE_CODE_INV	Items, Define Controls, Charge Codes	Specify internal charge codes that define how items should be charged when consumed from a par locations.
Grades	PRODUCT_GRADE_INV	Items, Define Controls, Grades	To define internal rating levels for items and lots, use the Grades (PRODUCT_GRADE_INV) component. The information defined on this page is used on the Define Item - General: Classifications page, the Item Templates page and the Lot Control Information page.
Hazard/Disposal Codes	HAZARD_TYPE_INV	Items, Define Controls, Hazard/Disposal Codes	To define hazard/disposal codes, use the Hazard/Disposal Codes component. Define codes for any special handling instructions. The information defined in this page is used on the Item Templates page and the Define Item - General: Classifications page.

Page Name	Object Name	Navigation	Usage
Item Attributes Group	EN_CHGOVER_GRP	Items, Define Controls, Item Attributes Group	<p>If you use PeopleSoft Supply Planning, use the Item Attributes Group (EN_CHGOVER_GRP) component to set up attribute groups. Items that belong to specific attribute groups can be assigned to specific resources (for example, crews, machines, and tools).</p> <p>Note. If you are using PeopleSoft Supply Planning, you must define item attribute groups to assign resource changeover penalties on the Crews - Changeover page, the Machines - Changeover page, or the Tools - Changeover page in the PeopleSoft Manufacturing application.</p>
Item Default Values	INV_ITEM_DEFAULTS	Items, Define Controls, Item Default Values	Establish item attribute defaults that are automatically assigned to each new item. All inventory items in the setID can share these attributes.
Item Families	PROD_FAMILY_INV	Items, Define Controls, Item Families	Establish item family options.
Family Rtg Assignment (family routing assignment)	EN_RTG_FAMILY	Items, Define Controls, Item Family Routing, Family Rtg Assignment	Use the Item Family Routing (EN_RTG_FAMILY) component to assign items to item families. If you are using PeopleSoft Manufacturing, you can define a routing for each item you manufacture. To reference another item's routing, use the Define Business Unit Item - Manufacturing: General page.
Item Groups	INV_ITEM_GROUP	Items, Define Controls, Item Groups	Group similar items together.
Group Rtg Assignment (group routing assignment)	EN_RTG_GROUP	Items, Define Controls, Item Group Routing, Group Rtg Assignment	Use the Item Group Routing (EN_RTG_GROUP) component to assign items to item groups. If you are using PeopleSoft Manufacturing, you can define a routing for each item you manufacture.

Page Name	Object Name	Navigation	Usage
Item Number Control	ITEM_NBR_CONTROL	Items, Define Controls, Item Number Control	Define whether new inventory items are sequentially numbered or manually numbered.
Item Templates	INV_ITEM_TEMPLATES	Items, Define Controls, Item Templates	Create various sets of item attribute defaults to use when defining new items.
Item Types	INV_ITEM_TYPE	Items, Define Controls, Item Types	To group inventory items by function, use the Item Types (INV_ITEM_TYPES) component. For example, you can group expense, service, or inventory items. The information defined on this page is used on the Define Item - General: Classifications page and the Defining Purchasing Item Categories.
MSDS Identifiers (material safety data sheet identifiers)	MSDS_ID_INV	Items, Define Controls, MSDS Identifiers	To create IDs for items that require a material safety data sheet (MSDS), use the MSDS Identifiers (ITEM_MSDS_ID) component. PeopleSoft Inventory does not provide standard MSDS documents. Instead, you define an informational code to be used when processing items in the system. The information defined here is used on the Define Item - Inventory: Shipping/Handling page.
Packing Codes	PACKING_CODE_INV	Items, Define Controls, Packing Codes	To create informational codes for items that require special packing routines, use the Packing Codes (PACKING_CODE) component. The information defined on this page is used on the Define Item - Inventory: Shipping/Handling page, on the Define Business Unit Item - Inventory: Weight/Volume page, in the Packing Session component, and on the Item Templates page.

Page Name	Object Name	Navigation	Usage
Demand Priority Family	PL_PRIO_FAMILY	Items, Define Controls, Demand Priority Family	Set up demand priority groups that you can then associate with an item.
Potency Codes	POTENCY_CODE_INV	Items, Define Controls, Potency Codes	To create informational codes to specify an item's potency, use the Potency Codes (POTENCY_CODE_INV) component. The information defined on this page is used on the Define Item - General: Classifications page.
Replenishment Classes	INV_REPLEN_CLASS	Items, Define Controls, Replenishment Classes	To create groupings for items that are subject to automated periodic replenishment within a business unit, use the Replenishment Classes (REPLENISH_CLASS) component. The information defined on this page is used on the Define Business Unit Item - Inventory: Replenishment page, the Replenishment Parameters page, and the Replenishment Options page.
Stock Types	INV_STOCK_TYPE	Items, Define Controls, Stock Types	To create ownership information codes for items that are leased or consigned, use the Stock Types (INV_STOCK_TYPE) component. A stock type must be assigned during putaway of non-owned items. The information defined on this page is used on the Define Item - General: Classifications page, the Item Templates page the Define Item - Inventory: Shipping/Handling page, the Manual Staging page, and the Express Putaway page.
Stocking Periods	STOCK_PERIOD_INV	Items, Define Items and Attributes, Stocking Periods	Set up time-phased safety stock and excess stock levels for PeopleSoft Supply Planning. You can also populate this page by either uploading data from a third-party forecasting system or using PeopleSoft Inventory Planning and Demand Planning.

Page Name	Object Name	Navigation	Usage
Storage Rules	STOR_INSTRUCT_INV	Set Up Financials/Supply Chain, Product Related, Inventory, Storage Rules	To define special storage requirements for items, use the Storage Rules (STOR_INSTRUCTION) component. The information defined on this page is used on the Define Item - Inventory: Shipping/Handling page, the Item Templates page, and the Putaway Detail page.
Utilization Type	UTIL_TYPE_INV	Items, Define Controls, Utilization Types	<p>Create utilization types to define the ABC classifications to use in the environment. For example, you may decide to classify items as <i>A</i>, <i>B</i>, and <i>C</i>, or <i>High</i>, <i>Medium</i>, and <i>Low</i>. The Utilization Type Calculation process assigns utilization types to individual items by business unit and utilization group.</p> <p>Note. On the Perform Physical Accounting pages, utilization types are selected in alphabetical order.</p>
Util Group Inv (utilization group - inventory)	UTIL_GROUP_INV	Items, Define Item Controls, Utilization Groups	Define new utilization groups. Create a separate utilization group for each ABC utilization grouping that you want to maintain in the system. For example, establish utilization groups for cycle counting, planning, material handling, or performance reporting. Each utilization group can use different parameters to assign items to a specific utilization type. For example, the inventory control supervisor may consider an item to be a <i>C</i> item because it is a slow mover, but the purchasing department may consider that same item to be a <i>B</i> item because of its lead time.

Defining Charge Codes

To define charge codes, use the Charge Codes (CHARGE_CODE_INV) component.

Access the Charge Code page.

The information defined on this page is used on the Define Par Location - Line page, the Consumer Usage page, and Consumer Usage Entry page. You can also capture the charge code during material usage tracking and pass it to a third-party billing system.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Managing Par Inventory”

Assigning Item Default Values

To assign item default values, use the Item Defaults (ITEM_DEFAULTS) component.

Access the Item Default Values page.

Note. Modification of the item default values do not change existing item data.

Item Tracking	Select a value to define the type of stocking control most commonly used by items in this setID.
Lot	Select when inventory items are either produced or otherwise grouped in distinct and identifiable subsections, often referred to as <i>lots</i> . Lots often represent production runs. Default values for items that are not lot-controlled are defined on the Installation Options - Inventory page.
Serial	Select when each inventory item in stock is managed in units of one. Default values for items that are not serial-controlled are defined on the Installation Options for Inventory page.
Ship Serial	Select when serial tracking is required only at the time of shipment. Ship-serial items can be moved throughout the inventory business unit without serial control, which simplifies transaction processing and entry. Serial numbers are then assigned at the time of shipment to provide serial tracking on products shipped to customers, internal locations, and other Inventory business units.
Non-Owned Item	Select if the majority of the items are maintained in inventory but not owned by the business unit.
Create Product	Select when a product ID is to be created the majority of the time. The product ID will be created when saving the Define Item component.
Item Type	Select an item type if the majority of the items will use the same value.
Costing Group	Select a cost profile group if the majority of the items will use the same value.
Category Code	Select a category code if the majority of the items will use the same value.
Cost Element	Select a cost element if the majority of the items will use the same value.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Preparing to Implement PeopleSoft Inventory”

PeopleSoft Inventory 8.8 PeopleBook, “Managing Consigned Inventory”

Assigning Items to Item Families

To create item families, use the Item Families (INV_PROD_FAMILIES) component.

Access the Item Families page.

In PeopleSoft Inventory, you can categorize items by groups and families. No formal relationship exists between item groups and item families, but you can use an item family to further classify an item group. For example, you can define the hardware group as consisting of families of printers and monitors.

The information defined on this page is used on the Define Item - General: Common page, when setting up cycle counting events on the Event Creation Process page, as an alternate search key for item ID, and as a selection criteria when running the Inventory Value report, the Cost Profiles report, the Basic Item Listing report, and the Stock Status report.

When you associate an item with a family on the Family Rtg Assignment page or with a group on the Group Rtg Assignment page, you can also associate it with a reference routing item ID. Floor stock, expensed, and planning items, however, cannot be specified as a reference routing. Once this information is defined, you can set up master routings by item family or by item group on the Define Business Unit Item - Manufacturing: General page.

See Also

PeopleSoft Manufacturing 8.8 PeopleBook, “Structuring Routings”

Assigning Items to Groups

To create item groups, use the Item Groups (INV_ITEM_GROUPS) component.

Access the Item Groups page.

The information defined on this page is used on the Define Item - General: Common page as an alternate search key for item ID, when defining transaction accounting rules, and as a selection criterion when running the Inventory Value report, the Cost Profiles report, the Basic Item Listing report, and the Stock Status report. In manufacturing environments, item group information can also be specified on the Group Rtg Assignment page.

Defining Item Numbering

To enable automatic numbering, use the Item Number Control (INV_ITEM_CONTROL) component.

Access the Item Number Control page.

If you enable automatic numbering, you can still manually enter item IDs when adding new items. To do so, enter an item ID number and override the value of *NEXT*. The *NEXT* value tells PeopleSoft Inventory to create the item ID with the next unique sequential number.

Note. If you do not select the Auto Number Items check box, you must manually enter an ID when defining new inventory items.

Establishing Item Templates

To create item templates, use the Item Templates (ITEM_TEMPLATE) component.

Access the Item Templates page.

After filling in the required information on the Define Item - General pages, you can select the template ID on the Define Item - General: Classifications page to automatically fill in many of the other item attribute defaults in the rest of the component. You can override these defaults. Template modifications do not change existing item data.

Grouping Items in Demand Priority Families

Access the Demand Priority Family page.

Once you define the demand priority family, you can use it to group like items for independent demand prioritization purposes. You assign the demand priority family to each item using the Define Item - General: Common page. Once you assign a demand priority family to a group of items, you can set demand priorities by family priority grouping using the Demand Prioritization page in PeopleSoft Supply Planning.

Defining Stocking Periods

To create stocking periods, use the Stocking Periods (STOCK_PERIOD) component.

Access the Stocking Periods page.

Note. The information on this page supersedes any stocking level information that you enter when you set up item attributes at the business unit level.

Multiple	Displays the stock-keeping unit of measure for the item.
Start Date and End Date	Enter the dates that determine the period for which the corresponding safety stock and excess stock is established within PeopleSoft Supply Planning.
Safety	Enter the preferred level to which you want to increase stock when you pass the Safe Limit (safety stock level). For example, if stock falls below 45, then you might want to create enough supply to bring the level up to 100.
Safe Limit	Enter the lowest quantity that stock should not surpass. This is the safety stock.
Excess	Enter the preferred level to which you want to decrease stock when you pass the Ex. Limit (excess stock limit). For example, if stock goes above 10,000, you can bring it down to 7,500.
Ex. Limit (excess stock limit)	Enter the highest quantity that stock should not surpass.

Stock limits must always be equal to or less than the preferred stocking levels. In addition, safety stock levels must be less than or equal to excess stocking levels.

Note. If you use PeopleSoft Supply Planning, the quantities that you enter on this page should be in multiples of the quantity defined in the Order Multiple fields on the Define Business Unit Item - Planning: Order Modifiers page.

If you use PeopleSoft Demand Planning or Inventory Policy Planning, you can populate this page using a two-step process:

1. Create a flat file by running the Inventory Policy Export process in PeopleSoft Inventory Policy Planning.

2. Upload the file using the Forecast/Replenishment process in PeopleSoft Demand Planning.

If you use PeopleSoft Inventory, you can upload forecast data from a third-party forecast planning application.

See Also

PeopleSoft Demand Planning PeopleBook

PeopleSoft Inventory 8.8 PeopleBook, “Replenishing Inventory,” Integrating With a Third-Party Forecast Planning Application

Defining Utilization Types

To create utilization types, use the Utilization Types (INV_UTILIZ_TYPES) component.

Access the Utilization Types page.

Create utilization types to define the ABC classifications used in the environment. Utilization types can be used to classify inventory items for numerous reasons including; cycle counting, planning, material handling, or performance reporting. Utilization types assigned to an item ID can be viewed on the Define Business Unit Item - Inventory: Utilization Types page.

Defining Utilization Groups

To create utilization groups, use the Utilization Groups (INV_UTILIZ_GROUPS) component.

Access the Util Group Inv page.

For Cycle Count

Select to make this the default utilization group for cycle counting. Anytime that you change the default, the system updates the Counting Event Utilization Types table (COUNT_UTIL_INV).

Note. If you use the Due to Count cycle-counting method, you must define a default cycle count group; otherwise, you receive an error message on the Counting Event - Utilization Types page.

For Planning

Select to make this the default utilization group for inventory planning. You can override this default on the Define Business Unit Item - Inventory: Utilization Types page.

Build Group Items

Click to add all items that meet the criteria defined in the Utilization Group Details group box to this utilization group. This link adds the appropriate items to the BU_ITEM_UTIL_CD table. If you click the link for an existing utilization group, the system replaces all items with items that meet the criteria specified here.

CHAPTER 4

Defining Items

Before processing an inventory item in a PeopleSoft application, you must define the item within the system.

This chapter discusses how to:

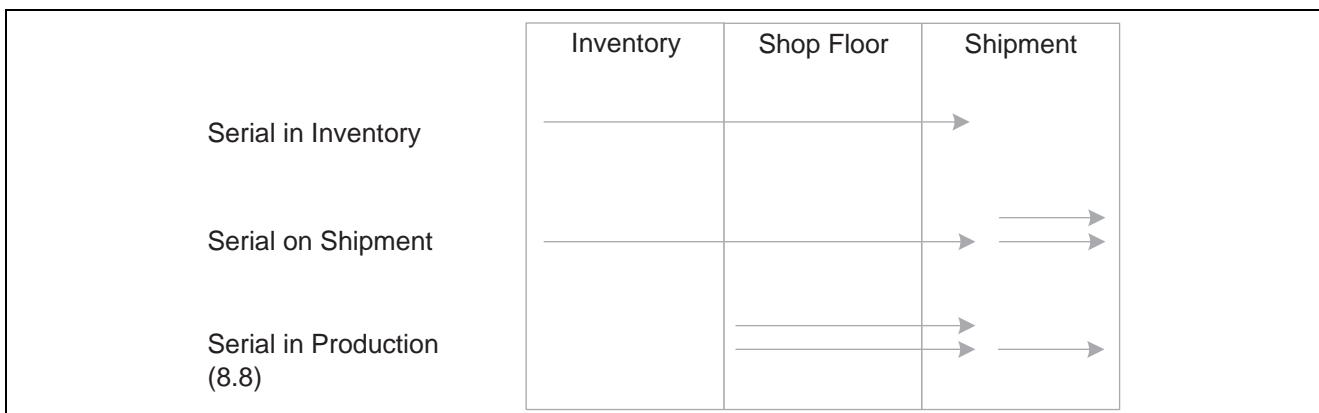
- Define items at the setID level.
- Approve item definitions.
- Modify item attributes for the business unit.
- Associate an item with a unit of measure (UOM).
- Copy items.
- Substitute items.
- Assign serial numbers automatically.

Understanding Items at the SetID Level

To establish an item ID and the corresponding attributes for a setID, use the Define Item (ITEM_DEFIN) component. You can either define the item attributes from scratch or modify item attribute default or template information that you set under the Define Controls menu.

Use the Define Item component to establish lot or serial-controlled components.

This diagram illustrates how PeopleSoft handled serial processing prior to release 8.8:



How PeopleSoft handled serial processing prior to Release 8.8

This section discusses how to:

- Define general item information.
- Define additional item attributes.
- Define item dimensions.
- Define material usage attributes.
- Establish item tracking and lot-control attributes.
- Establish item shipping and handling attributes.
- Define configuration attributes for an item.

Pages Used to Create Item Definitions for the SetID

Page Name	Object Name	Navigation	Usage
Define Item - General: Common	INV_ITEMS_DEFIN1	Items, Review Item Information, Items, General Items, Define Items and Attributes, Define Item, General	Define an inventory item at the setID level.
Define Item - Item Image	INV_ITEM_IMAGE_SEC	Click the Item Image link on the Define Item - General: Common page.	Maintain an image of an item.
Define Item - Manufacturer's Item	ITM_MFG_SP	Click the Manufacturers link on the Define Item - General: Common page.	Define information about the item's manufacturer.
Define Item - General: Classifications	INV_ITEMS_DEFIN4	Items, Review Item Information, Items, General Items, Define Items and Attributes, Define Item, General	Continue defining attributes for the item.
Define Item - General: Dimensions	INV_ITEMS_DEFIN3	Items, Review Item Information, Items, General Items, Define Items and Attributes, Define Item, General	Track the item's dimensions, size, and color.
Define Item - General: Usage	INV_ITEMS_DEFIN8	Items, Review Item Information, Items, General Items, Define Items and Attributes, Define Item, General	Define material usage attributes for an item at the setID level.
Define Item - Inventory: Tracking/Description	INV_ITEMS_DEFIN2	Items, Review Item Information, Items, Inventory Items, Define Items and Attributes, Define Item, Inventory	Establish or maintain item descriptions and lot-control attributes.

Page Name	Object Name	Navigation	Usage
Define Item - Inventory: Shipping/Handling	INV_ITEMS_DEFIN5	Items, Review Item Information, Items, Inventory Items, Define Items and Attributes, Define Item, Inventory	Establish or maintain shipping and handling attributes.
Define Item - Substitutes	INV_ITEMS_DEFIN7	Items, Review Item Information, Items, Substitutes Items, Define Items and Attributes, Define Item, Substitutes	Establish or maintain substitute items.
Define Item - Configuration	INV_ITEMS_DEFIN6	Items, Review Item Information, Items, Configuration Items, Define Items and Attributes, Define Item, Configuration	Define item distribution and production configuration attributes, if you are using PeopleSoft Product Configurator.
Define Item - Custom: Character	INV_ITEMS_DEFIN9	Items, Review Item Information, Items, Custom Items, Define Items and Attributes, Define Item, Custom	Define alphanumeric field values at the setID level for item attributes that are unique to the enterprise.
Define Item - Custom: Numeric	INV_ITEMS_DEFIN10	Items, Review Item Information, Items, Custom Items, Define Items and Attributes, Define Item, Custom	Define numeric field values at the setID level for item attributes that are unique to the enterprise.

Defining General Item Information

Access the Define Item - General: Common page.

General Inventory Substitutes Configuration Custom Audit

Common Classifications Dimensions Usage

SetID: SHARE **Item ID:** 10000

***Description:** Long Sleeve Biking Jersey, Men's

Item Status

Current Status Date: 04/15/2000	*Current Status: Active
Future Status Date:	Future Status: <input type="button" value="Copy Item Status"/>

*Standard UOM: EA Each **Default Category:** CYCLING

*Physical Nature: Goods

Item Group: APPAREL

Family: COMMON Apparel

Demand Priority:

Cost Profile Group: 1003 Buy Items

Promise Option: Perform ATP Reservations

Item Image Manufacturers Purchasing Item Attributes Units Of Measure

Item Type

- Inventory Item**
- Non-Owned Item**
- Consigned**

Define Item – General: Common page

Item ID

Item IDs cannot have embedded spaces or special characters. If you use automatic numbering for items, leave the item ID as *NEXT*, to assign the next sequential number, or enter an item ID manually. PeopleSoft Inventory uses the item ID as its primary search key for the item master file.

Current Status Date

If you modify the item status, the current status date is automatically updated to reflect the date of the change.

Current Status

Select a value: *Under Initialization, Pending Approval, Denied Approval, Active, Hold, Discontinue, or Inactive*.

However, you can select only a subset of these status values. If the item is *Under Initialization*, you can set the Current Status field to *Pending Approval*. After the item definition is approved, either automatically or manually, you can set the status to *Hold* or *Discontinue*.

Future Status Date and Future Status

Enter a date and a status that the Item Status Change process implements.

Note. You cannot select a future status of *Inactive* for certain items. If an item is defined for a business unit and used in manufacturing on the Define Business Unit Item – General: Costing page (Used for MFG option), it cannot be inactivated at the business unit or the setID level.

Copy Item Status

Click to access the Copy SetID to BU Item Status page, where you can copy the item status for the setID to any of the business units where the item is defined.

Inventory Item

Indicates that the item is physically stocked in inventory. The attributes that you enter for a non-inventory item at the business unit level are limited to support PeopleSoft Manufacturing and PeopleSoft Supply Planning. This enables you to add non-inventory items, such as documentation or user manuals, to the bill of material (BOM). Additionally, you can create forecasts

at a family or group level by defining planning items and planning BOMs. You cannot create transactions for non-inventory items in PeopleSoft Inventory.

Non-Owned Item

This selection defaults from the Defining Purchasing Item Categories to the business unit level, and you can override it on the Define Business Unit Item - General: Common page. PeopleSoft Inventory does not create accounting entries for non-owned item transactions. To identify the owner of the stock, you must also indicate the stock type on the Define Item - General: Classifications Page. You can overwrite the selection at the time of putaway by using the Manual Staging page or the Express Putaway page.

Consigned

This option is available if the item is non-owned. The selection that you make defaults at the business unit level, and you cannot override it on the Define Business Unit Item - General: Common page.

Standard UOM

Select the most common UOM for the item. UOMs that you establish on the Units of Measure page under the Common Definitions menu are available for selection.

The measurement that you select must be valid for stocking, shipping, and ordering. PeopleSoft Inventory maintains the quantity on hand for an item and its cost in the standard UOM. Because of the quantity-on-hand and the costing calculations, you cannot change this selection for an item after the first transaction in PeopleSoft Inventory. These transactions include setup of an item vendor relationship on the Purchasing Attributes - Item Vendor Page.

Warning! To minimize rounding discrepancies when using multiple UOMs, use the smallest valid UOM for the item as the standard UOM, and make it a whole number.

Default Category

You must select a value if you have PeopleSoft Purchasing installed to categorize the item appropriately for the purchasing catalogs.

Physical Nature

Select the option of *Goods* or *Services*, which classifies the item for intransit reporting requirements between countries.

Item Group and Family

Categorizations for reporting or alternate search keys. Item groups can be used when defining transaction accounting rules, and item families can be used during cycle counting.

Demand Priority

If you are using PeopleSoft Supply Planning, this option enables you to group like items to establish a common priority for all items within a single group. The demand priorities can then be established for both planning applications. You define demand priority families by using the Demand Priority Family page.

Cost Profile Group

Assigning an item to a cost profile group determines the books that the item uses when accounting for the item. When you add this item to a business unit, the Define Business Unit Item - General: Costing page uses this field to determine the items' cost profile within each book that the business unit uses.

Be aware of these conditions:

If the item is not serial controlled, the cost profile group that you assign to the item cannot be associated with any profiles that have serial ID as the deplete cost method or the cost flow.

If the item is not lot controlled, the cost profile group that you assign to the item cannot be associated with any profiles that have lot ID as the deplete cost method or the cost flow.

Promise Option

(Optional) Select a value:

Perform ATP Reservations (perform available-to-promise reservations): Select this option to enable customer service representatives using PeopleSoft Order Management to promise the item at the time of order, or to enable the Reserve Materials process (IN_FUL_RSV) in PeopleSoft Inventory to promise demand for the item based on anticipated supply.

Important! To ensure accurate validation, you must complete item definition at the setID and business unit levels and specify non-soft-reservations processing for the item before you select the *Perform ATP Reservations* value. For step-by-step procedures for setting up ATP-reserved items, see Understanding ATP-Reservations.

Create Product

Select if the enterprise uses product IDs, and you want the system to create a product ID when you save the item definition.

Use Item ID

Select to use the item ID as the product ID in PeopleSoft Order Management.

Product ID

If you do not select the Use Item ID option, you can enter a value in this field or, if you set up automatic numbering for products, you can enter a value of *NEXT*.

These options are available only if PeopleSoft Order Management is installed and you are in Add mode or if you are updating an item that has a status of *Under Initialization*.

Item Image

Click to access the Item Image page, where you can add, remove, or view a picture of the item.

Manufacturers

Click to access the Manufacturer's Item page, where you can define information about the items' manufacturer.

Purchasing Item Attributes

Click to access the Purchasing Attributes component, where you can specify purchasing information for the item. You can only access the Purchasing Attributes component after the item is initially saved.

Units of Measure

Click to access the Units of Measure component, where you can assign additional UOM's to the item. You can only access the Unit of Measure component after the item is initially saved.

See Also

[Chapter 3, “Defining Item Control Values.” Defining Item Numbering, page 62](#)

[Chapter 2, “Working With Items.” Managing Inventory by Item Status, page 6](#)

[Chapter 2, “Working With Items.” Updating Item Status, page 11](#)

PeopleSoft Inventory 8.8 PeopleBook, “Receiving and Putting Away Stock”

PeopleSoft Inventory 8.8 PeopleBook, “Promising and Reserving Inventory,” Understanding Inventory Reservation Methods

Defining Additional Item Attributes

Access the Define Item - General: Classifications page.

Template ID

Select a value to use default values from an item template that you define on the Item Templates page. Selecting a template causes all of the template values to populate this item's values, but you can override any attributes.

Grade

The value in this field is the default on the Lot Control Information page when you create new lots. This field is informational only.

Item Type

Select a value to define the functional group for this item. You can use this information as a search key for reports and inquiries. Establish item types on the Item Types page under the Define Controls menu.

Potency Code and UPC Code (universal product code)

These fields are informational only.

Stock Type

If the item is non-owned, select a value to identify the type of stock and the stock owner. The stock type defaults from the Defining Purchasing Item Categories to the business unit level and can be modified on the Define Business Unit Item - Inventory: Shipping/Handling page.

Commodity Code

Select a value to use on bills of lading to group and identify products that are being shipped for freight rating and insurance purposes. Establish commodity codes, also known as freight classes, on the Commodity Code page under the Common Definitions menu.

EU Commodity Code

PeopleSoft Inventory uses this code for Intrastat Reporting purposes.

See Also

PeopleSoft Global Options and Reports 8.8 PeopleBook, “Setting Up and Running Intrastat Reports”

Defining Item Dimensions

Access the Define Item - General: Dimensions page.

Length, Height, Width, Dimension UOM

The system uses dimension information on the Alternate Plan page for putaway and capacity checking, if you enable capacity checking by volume for the business unit and storage locations.

Weight, Weight UOM, Volume, Volume UOM

Indicate weight and volume values that the system uses when creating bills of lading and during load planning. The system uses these values if shipping and packing weights and volumes are not defined on the Define Business Unit Item - Inventory: Weight/Volume page. The system also uses weight and volume for capacity checking when you enable capacity checking for the business unit and storage locations. Base the weight and volume that you enter on the items' standard UOM.

Note. When you change the weight and volume, recalculate capacity for the storage locations where you track capacity. For each item storage location, select the Calc capacity at save time (calculate capacity at save time) option on the Volume/Weight Capacity Checking page.

Item Size and Item Color

These fields are informational only.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Structuring Inventory,” Checking Storage Location Capacity

Defining Material Usage Attributes

Access the Define Item - General: Usage page.

Define Item – General: Usage page

Note. The values that you enter on this page become default values on the Define Business Unit Item - General: Usage page.

Usage Tracking

Select a method to track the item for billing or costing purposes.

Note. The process for collecting this information and communicating it to the third-party billing system is the same for each value. The difference is in the methodology that the third-party system uses when billing the consumer.

Values are:

Billing: Tracks the usage of the item for billing. This method compiles consumer usage information to bill the consumer directly for items that are used.

Costing: Tracks the usage of the item for cost accounting. This method compiles the consumer usage information to set the cost of a procedure accurately. After the cost is set, you can determine the charge for that procedure. Over time, monitor procedure costs to ensure that the procedure price remains competitive and covers actual costs.

Reconcile

Select to include the item in the material usage reconciliation of its par location. You can only reconcile items that are tracked for billing or costing. You must set up reconciled items that are replenished to their par location (the Not Replenished check box is clear on the Define Par Location Groups page and Define Par Location - Line page), with a replenishment control selection of *Par* or *Min/Max* on the Define Par Location - Line page.

Charge Markup % (charge markup percentage) and Charge Markup Amt (charge markup amount)

Enter the markup percentage and flat markup on the item. The system applies the markup to the cost of the item and includes it in the outbound material usage message for informational purposes only.

Charge Code

The charge code is for informational purposes only. Use this code to assist in consumer billing. Set up this internal code on the Charge Codes page.

Currency Code

Enter the currency code that represents the values in the Service Price and Service Exchange Amount fields.

Service Price and Service Exchange Amount

Enter the service part price and the part exchange price. This value is used with PeopleSoft Customer Relations Management.

Reusable, Disposable, Recyclable, Consumable, Returnable, or Serviceable

Select for reporting and inquiry purposes only.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Tracking Material Usage,” Reconciling Material Usage with Receipts

Establishing Item Tracking and Lot-Control Attributes

Access the Define Item - Inventory: Tracking/Description page.

Define Item – Inventory: Tracking/Description page

The values for Lot Control, Serial Control, and Ship Serial Control are entered as defaults from the Item Default Values page.

Warning! After lot, serial, ship-serial, and stage date control flags are set and you begin to put stock away, these fields are unavailable for entry—you cannot modify them.

Lot Control

Select to indicate that a quantity of inventory items is produced as a group or otherwise collected into an identifiable unit. Lots often represent production runs. For lot-controlled items, the lot ID is entered at the time of receipt and putaway and for inventory movement transactions. A default filler value for lot ID is entered on the Installation Options - Inventory page and is used by items that are not lot controlled.

Serial Control

Select to indicate that a unique identifier is assigned to each item that is in stock. The system manages serial-controlled inventory items in units of one, based on the standard UOM. For serial-controlled items, enter the serial ID at the time of receipt and putaway and for all inventory movement transactions. A default filler value for serial number is entered on the Installation Options - Inventory page and is used by items that are not serial controlled.

Shipping Serial Control

Select to indicate that serial tracking is required only at the time of shipment. Ship-serial items can be moved throughout the inventory business unit without serial control, which simplifies transaction processing and entry. Serial numbers are then assigned at the time of shipment to provide serial tracking on products that are shipped to customers, internal locations, and other inventory business units.

Trace Usage

Select the *Serial* value to track the components of this assembly.

If existing inventory transactions have occurred you will receive a warning message that future genealogy tracking will be affected but we will allow the change.

This option is used for component items and enables associating the component's serial or lot ID with a higher-level assembly item whose serial in production option is equal to Yes. Values include:

- *Serial*: Select to enable this component's serial ID to be tracked in a higher level assembly whose Serial in Production option selected. If the component's Lot Control option is selected then both the serial ID and Lot ID will be tracked.
- *Lot*: Select to enable this component's lot ID to be tracked in a higher level assembly whose serial in production option is Yes.
- *None*: Select if you do not want to track this item.

Similar to serial in production, trace usage can be used in conjunction with the Serial Control option. If Serial Control option is selected, then the serial ID will be identified in inventory, and this serial ID remains with the item throughout the entire manufacturing process. If Serial Control is cleared then serial ID will not be identified in inventory but a serial ID will be specified when the item is associated with a serial assembly. This allows tracking the genealogy without requiring the need to track the serial ID in inventory.

Important! The source code for serial-controlled items must be Make or Buy.

See *PeopleSoft Manufacturing 8.8 PeopleBook*, “Understanding PeopleSoft Manufacturing”.

Staged Date Control

Select to indicate that the system tracks an item by the date that it is staged into inventory. This check box is available when you select the Staged Date Control check box on the Installation Options – Inventory page. If it is selected, it is used as a default for the setID/item, but you can override it. If the item is not tracked by its staging date, the staged date fields do not appear on any of the item transaction pages. The stage date is used as the default for the business unit-item level, which is the level that the system uses to determine staged-dated tracking. For stage date-controlled items, you must enter the stage date at the time of receipt and putaway and for all inventory movement transactions.

Serial in Production

Select this option if you want to track the key serial and lot components that make up this assembly item. You will assign a serial ID to the item during the manufacturing process. You will also identify serial and lot components that are used to produce this item.

This field can be used with and without the serial control option. If you do select serial control, then you will enter the serial ID for all material movement transactions. If you do not select the serial control option, then the system tracks the serial ID during the production process. This means that you assign a serial ID to the item during production and associate

serial and lot components to this serial assembly. During completions you'll complete the serial ID to inventory.

Note. If you select serial in production and not serial control, during subsequent inventory movements of this item, you will not need to enter the serial ID.

Device Tracking

Select to provide PeopleSoft Purchasing with item visibility throughout the procurement cycle.

Shelf Life (Days)

Enter the number of days that the item can remain in inventory before it is no longer usable.

Availability Lead Time (Days) and Retest Lead Time (Days)

Enter values for lot-controlled items. The availability lead time is the number of days between the lot's creation date and the date that it becomes available; the retest lead time is the number of days between a lot's creation date and the date that it needs to be retested.

Lot Status

Select a default value to assign to newly created lots for lot-controlled items. You can update lot status at any time on the Lot Control Information page. Values are:

Hold: Prevents material transactions for the item-lot combination temporarily.

Open: Enables regular processing of the lot. You cannot change an *Open* lot status if quantity for the item-lot combination is allocated to a demand line.

Rejected: Prevents material transactions for the item-lot combination.

Restricted: Provides a warning when you use the lot in an inventory transaction.

Note. Because hold, rejected, and restricted lots are not available for picking plans or for lot allocations, their available quantity is 0. You can, however, use restricted lots in picking transactions on the Picking Feedback page.

Note. The shelf life, availability lead time, and retest lead time are default values for the business unit level. You can modify these values on the Define Business Unit Item - Inventory: Shipping/Handling page.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Managing Item Lots”

PeopleSoft Inventory 8.8 PeopleBook, “Preparing to Implement PeopleSoft Inventory”

PeopleSoft Inventory 8.8 PeopleBook, “Managing Inventory Status”

PeopleSoft Manufacturing 8.8 PeopleBook, “Understanding PeopleSoft Manufacturing,” Serial Genealogy

Establishing Item Shipping and Handling Attributes

Access the Define Item - Inventory: Shipping/Handling page.

Storage Rule

Select a rule that will appear on both the Putaway Plan and on the Review Plan.

MSDS ID (material safety data sheet ID)	Select the appropriate ID, for informational purposes, if the item requires one. Establish MSDS IDs on the MSDS Identifiers page.
Storage Temp, Storage Humidity	These fields are informational only.
Max Capacity (maximum capacity)	Enter the maximum capacity that this inventory item can be stored in a designated material storage bin. Track maximum capacity when storage locations in an inventory business unit are assigned exclusively to particular inventory items. This field reflects the standard UOM and is informational only.
Packing Code	Select a value. Establish packing codes on the Packing Codes page under the Define Controls menu.
Ship Via	Select a shipping code. Establish shipping codes on the Ship Via Codes page under the Common Definitions menu. The value that you select appears by default for the business unit; you can modify it on the Define Business Unit Item - Inventory: Shipping/Handling page. The Ship Via value for the item at the business unit level appears by default on the order line when you enter a request for this item by using the Material Stock Request component. The default hierarchy for the ship via value depends on the type of order that you create. Outbound sales order lines' hierarchy is: <ol style="list-style-type: none">1. Load ID (if assigned).2. Inventory item ID.3. Contract.4. Ship to customer.5. Order group. Outbound material stock requests' hierarchy is: <ol style="list-style-type: none">1. Load ID (if assigned).2. Inventory item ID.3. Customer. Interunit transfers' hierarchy is: <ol style="list-style-type: none">1. Transfer attributes by item.2. Transfer attributes by business unit. Inbound purchase orders' hierarchy is: <ol style="list-style-type: none">1. Vendor.2. Business unit options.
Tariff Cd (tariff code)	Select the harmonized tariff code for the item. Establish harmonized tariff codes on the Harmonized Tariff Code page under the Common Definitions menu.

Various documents that accompany shipments across international borders require harmonized tariff codes. Customs officials use these codes to determine duty on shipped commodities. The system uses this information on export bills of lading for export sales orders that are defined in PeopleSoft Order Management or export intercompany transfers in PeopleSoft Inventory.

Defining Configuration Attributes for an Item

Access the Define Item - Configuration page.

General	Inventory	Substitutes	Configuration	Custom	Audit
SetID: SHARE	Item ID: LT5010			Standard Unit of Measure: EA	
				Custom Road Bicycle	
Configuration <div style="border: 1px solid #ccc; padding: 5px;"> <p><input checked="" type="checkbox"/> Distribution Configuration Distribution Model: LT5010_TREE </p> <p><input checked="" type="checkbox"/> Production Configuration Production Model: LT5010_PRDN_TREE </p> <p><input checked="" type="checkbox"/> Configuration Code Generation Template: LT5010_TMP Custom Bike Template</p> <p><input checked="" type="checkbox"/> Default Configured Lot</p> <p><input checked="" type="checkbox"/> Configuration Costing</p> </div>					

Define Item – Configuration page

Distribution Configuration Select to enable distribution configuration processing, which enables the system to capture dynamic option and pricing information.

Distribution Model If you select Distribution Configuration, the model is used to select the configuration rules that are used to configure this item.

Production Configuration Select to enable production configuration processing, which enables the system to:

- Perform routing operations and component generation for manufacturing configured items.
- Generate a production cost, if the item's cost is determined by the configuration.

Production Model If you select Production Configuration, the model is used to select the configuration rules that are used to configure this item.

Configuration Code Generation Select to indicate that the configuration template will be used to generate a configuration code. This option is only valid for lot controlled items that have distribution configuration.

Template	Select a template for configuration code generation. The system creates configuration codes based on the template that you select. You cannot change an item to use configuration codes if system activity exists for the item (such as inventory balances, customer orders, and so on).
Default Configured Lot	Select to indicate that the default value is the last lot with the same configuration code (during receipts and issues). This check box is available when you select Configuration Code Generation.
Configuration Costing	Select to generate costs for each unique configuration code during production order creation. Also, you can recalculate the cost of a configured item to reflect cost changes in standard items. This check box is available when you select Configuration Code Generation.

See Also

PeopleSoft Product Configurator 8.8 PeopleBook, “Working With Configuration Codes,”
Setting Up Automatic Configuration Code Generation

PeopleSoft Product Configurator 8.8 PeopleBook, “Using PeopleSoft Product Configurator,”
Establishing Configured Production Costs

Approving Item Definitions

For maximum control over the item master, the system enables you to require that authorized staff members approve item definitions before the items become available for transactions.

To set up and use manual item approval processing:

1. Select the Item Approval Required option on the Installation Options - Overall/GL page.
2. Specify an item approval method:
 - Manual: Authorized staff can approve or deny item definitions for a setID on the Item Approval page.
 - Workflow: You must establish item approval as a business process in PeopleSoft Workflow.
3. Change the current status of the item from *Under Initialization to Pending Approval* on the Define Item - General: Common page when you add item definitions at the setID level.

Changing the status makes the item definition available for approval on the Item Approval page or triggers the item approval workflow.

4. The system sends a worklist entry for each item definition with an item status of *Pending Approval* to an authorized staff member.

The item approval worklist entry transfers the authorized staff member to the Item Approval page.
5. The authorized user approves or denies the item definition on the Item Approval page.

Until an authorized user approves an item definition on the Item Approval page, you can't modify the item definition at the setID level. However, for items with a *Pending Approval* status, you can define purchasing information by using the Purchasing Attributes component and define item attributes at the business unit level by using the Define Business Unit Item component.

Before an item is approved, the only valid statuses on the Define Item - General: Common page are: *Under Initialization* and *Pending Approval*. In environments that don't require item approval processing, items with a *Pending Approval* status are updated to *Active* status.

In item-approval environments, the current item status is updated from *Pending Approval* to *Active* when an authorized user approves the item definition on the Item Approval page. After the user approves the item, you cannot change the item's approval status, and approved items are no longer available on the Item Approval page. Also, *Under Initialization*, *Pending Approval*, and *Denied Approval* are no longer valid item statuses on the Define Item - General: Common page. You can select only the *Active*, *Hold*, or *Discontinue* statuses.

Status Change Effects on the Item

Status changes at the setID level will affect the status at the business unit level:

- If the item has a status of *Under Initialization* at the setID level, the definition for the item at the business unit level can have only the status of *Under Initialization*.
- If the status of the item at the setID level is changed from *Under Initialization* to *Pending Approval*, all the definitions for the item at the business unit level are updated to *Pending Approval* status.
- If the status of the item at the setID level is changed from *Pending Approval* to *Active*, all the definitions for the item at the business unit level are updated to *Active* status.
- If you change the status of the item at the setID level back to *Under Initialization*, then all the definitions for the item at the business unit level are updated to *Under Initialization*.

See Also

[Appendix A, “Delivered Workflow for PeopleSoft Managing Items,” page 175](#)

[Chapter 2, “Working With Items,” Managing Inventory by Item Status, page 6](#)

Page Used to Approve Items

Page Name	Object Name	Navigation	Usage
Item Approval	INV_ITEM_APPROVAL	Items, Define Items and Attributes, Approve Item, Item Approval	Manually approve item definitions that you create at the setID level.

Approving Item Definitions

To approve items, use the Item Approval (ITEM_APPROVAL) component.

Access the Item Approval page.

Item Definition Approved Select a value:

Approved: Approves the item when you save the page. This is the status default value.

Denied: Denies the item so that it is not available for transactions, but you can view it by using the Review Item Information component.

Note. For items with a status of *Denied* or *Pending Approval*, you can change the status back to *Under Init* (under initialization). When you do, the status of the item definition at the setID and business unit levels change back to *Under Initialization*.

Modifying Item Attributes for the Business Unit

To specify item attributes at the business unit level, use the Define Business Unit Item (ITEM_ATTRIBUTE) component. Inventory items are defined at the setID level and can be shared among all of the business units. However, some item information (such as rules for replenishment, planning, and physical accounting) may vary depending on which business unit the item is in. These are the types of item attributes to define at the business unit level.

Note. For non-inventory items, the only field values that you can override at the business unit level are Source Code (on the Define Business Unit Item - Manufacturing: General page), Explode Demand for Consumption, and Forecast Fulfillment Size (on the Define Business Unit Item - Planning: Forecast/Incremental page).

This section discusses how to:

- Define basic business unit item attributes.
- Define item cost profiles.
- Define item export information.
- Define shipping and handling item attributes.
- Associate an item with putaway and picking zones.
- Define item replenishment attributes.
- Define item weight and volume information.
- Define item utilization types.
- Define default production and BOM information for an item.
- Set up item replenishment defaults.
- Specify planning information for an item.
- Define generation of item supply information.
- Define item forecast parameters.
- Define planning order modifiers.
- Define business unit attributes for configured items.

Pages Used to Modify Item Attributes for the Business Unit

Page Name	Object Name	Navigation	Usage
Define Business Unit Item - General: Common	GEN_ATTRIB_INV	Items, Define Items and Attributes, Define Business Unit Item, General	Define basic item attributes, such as the item's cost element and current purchase cost, at the business unit level.
Define Business Unit Item - General: Costing	CM_ITEM_METHOD	Items, Define Items and Attributes, Define Business Unit Item, General	See or define the cost profile of an item being added to a business unit in each of the books that the business unit uses.
Define Business Unit Item - General: Usage	MATRL_USG_ATTRIB	Items, Define Items and Attributes, Define Business Unit Item, General	Define material usage attributes for an item at the business unit level.
Define Business Unit Item - General: Export Information	GEN_ATTRIB_EXP_SEC		Specify values that are used in export documentation that is generated for the business unit.
Define Business Unit Item - Inventory: Shipping/Handling	OVRD_ATTRIB_INV	Items, Define Items and Attributes, Define Business Unit Item, Inventory	Configure the item's setID attributes to meet the needs of the business unit.
Item Zone Assignments	ZONE_ATTRIB_INV	Click the Assign Item to Zones link on the Define Business Unit Item - Inventory: Shipping/Handling page	Associate an item with putaway and picking zones in the business unit. Zone assignment is optional; however, it enables much tighter control over the putaway and picking operations.
Define Business Unit Item - Inventory: Replenishment	REPLEN_ATTRIB_INV	Items, Define Items and Attributes, Define Business Unit Item, Inventory Inventory, Replenish Inventory, Setup Item Replenishment	Define replenishment attributes for use in the automated replenishment routines of a particular business unit.
Define Business Unit Item - Inventory: Weight/Volume	WTVOL_ATTRIB_INV	Items, Define Items and Attributes, Define Business Unit Item, Inventory	Define weight and volume information for an item at the business unit level.
Define Business Unit Item - Inventory: Utilization Types	COUNT_ATTRIB_INV	Items, Define Items and Attributes, Define Business Unit Item, Inventory	Define the utilization group and type for the item at the business unit level.
Define Business Unit Item - Manufacturing: General	MFG_ATTRIB	Items, Define Items and Attributes, Define Business Unit Item, Manufacturing	Define default production and BOM information for an item if the installation includes PeopleSoft Manufacturing.

Page Name	Object Name	Navigation	Usage
Define Business Unit Item - Manufacturing: WIP Replenishment	MFG_ATTRIB2	Items, Define Items and Attributes, Define Business Unit Item, Manufacturing	Set up item replenishment default values, if you use PeopleSoft Manufacturing. This is required for PeopleSoft Flow Production. Also, set up default values if you use replenishment as the component issue method and you don't use PeopleSoft Flow Production.
Define Business Unit Item - Planning: General	PL_ATTRIB_INV	Items, Define Items and Attributes, Define Business Unit Item, Planning	Specify basic PeopleSoft Supply Chain Planning information for an item.
Define Business Unit Item - Planning: Fences/Lead Time	PL_ATTRIB_INV2	Items, Define Items and Attributes, Define Business Unit Item, Planning	Define the planning time, planning message parameters, safety stock and excess stock parameters, and other general information regarding how you generate supply for inventory items.
Define Business Unit Item - Planning: Forecast	PL_ATTRIB_INV3	Items, Define Items and Attributes, Define Business Unit Item, Planning	Define item-level parameters to control forecast consumption and incremental material supply and consumption.
Define Business Unit Item - Planning: Order Modifiers	PL_ATTRIB_INV4	Items, Define Items and Attributes, Define Business Unit Item, Planning	Define planned transfer, purchase, and manufacturing order quantity default values for an inventory item. PeopleSoft Supply Planning use these values when creating planning models. When planning transfers between business units, purchases from suppliers, or the production of items using PeopleSoft Manufacturing, consider defining modifiers to set up guidelines when creating planned supply in PeopleSoft Supply Planning.
Define Business Unit Item - Configuration	CONFIG_ATTR_PNL	Items, Define Items and Attributes, Define Business Unit Item, Configuration	Display and edit the business unit attributes for a configured item, if you use PeopleSoft Product Configurator.

Page Name	Object Name	Navigation	Usage
Define Business Unit Item - Custom: Character	ITEM_ATTR_CHAR_PNL	Items, Define Items and Attributes, Define Business Unit Item, Custom	Define alphanumeric field values at the business unit level for item attributes that are unique to the enterprise. Values that you define for the setID on the Define Item - Custom: Character page appear by default on this page, but you can modify them for the business unit.
Define Business Unit Item - Custom: Numeric	ITEM_ATTR_NUMB_PNL	Items, Define Items and Attributes, Define Business Unit Item, Custom	Define numeric field values at the business unit level for item attributes that are unique to the enterprise. Values that you define for the set ID on the Define Item - Custom: Numeric page appear by default on this page, but you can modify them for the business unit.
Business Unit Item Links	INV_BU_ITEM_LINKS	Items, Define Items and Attributes, Business Unit Item Links	Access all the pages that are related to the business process of defining an item for a business unit.

Defining Basic Business Unit Item Attributes

Access the Define Business Unit Item - General: Common page.

The screenshot shows the Define Business Unit Item - General: Common page. The top navigation bar includes tabs for General, Inventory, Substitutes, Manufacturing, Planning, Configuration, and Custom. Below the tabs, there are links for Common, Costing, Usage, and Export Information. The main content area displays item details: Unit (US008), Item ID (LT5003, description: Wheel Tire, 700x25), and Standard Unit of Measure (EA). The Item Status section shows Current Status Date (04/27/2000), Current Status (Active), Future Status Date, and Future Status. The Cost Element section shows Cost Element (102, description: Material - Wheels) and a checked checkbox for Inventory Item. The Standard Cost Group section shows Current Purchase Cost (4.5600) and Avg Matl Cost. The Default Actual Cost section shows Average Purchase Price (0.0000) and Last Price Paid (0.0000). The Non-Owned section includes checkboxes for Non-Owned Item and Consigned, and fields for Vendor ID and Vendor Location. A Related Links section is also present.

Define Business Unit Item – General: Common page

Current Status Date, Current Status, Future Status Date, and Future Status	See Chapter 4, “Defining Items.” Defining General Item Information, page 67.
Cost Element	Select the default material cost element for all receipts. The system requires this value for average-costed, actual-costed, and standard-costed items. You define cost elements on the Cost Elements page.
Inventory Item	Displays from the setID level and cannot be overridden.
Standard Cost Group	Select a cost group code to select a set of items to roll up or update. You can also compare cost versions and report inventory value by cost group code. Establish cost group codes on the Cost Groups page accessed from the Set Up Financials/Supply Chain - Product Related - Cost Accounting - Standard Cost Groups menu item.
Current Purchase Cost	Enter a value for the system to use to determine the material cost of purchased items and the lower-level material cost of a manufactured item when the cost type that you are rolling uses current costs. This value is per the standard UOM.
Avg Matl Cost (average material cost)	This average material cost is automatically updated when a purchase receipt is putaway. The current value is stored in the AVERAGE_COST_MAT field of the BU_ITEMS_INV record. This cost reflects the vendor's price of the item. This average cost calculation only includes the material portion of the purchase order cost; it does not include landed costs, voucher updates, or cost adjustments.
Default Actual Cost	Enter a value for actual-costed items that can be used by the Stock Quantity Update process if the item may be included in an inventory count prior to an actual cost being generated from receipt of the item. The value in this field is used in these processes: INS5050 (Reconciliation Report). INS5200 (Slow Moving Inventory). INS9080 (Forecasting Download). INPBPROC (Confirmations). INPOPROC, INPOTEST (Stock Qty Update). INPQEOQC (Replenishment Parameters). INPVVALD (Inventory Adjustments).
<hr/> Note. You must enter a default actual cost if an average-costed book is defined for the business unit. <hr/>	
Average Purchase Price	The system updates this value whenever items are received and put away into an owned storage location or whenever the item is consigned. The only items that do not have this field updated are noncosted items or items for which all of the books are defined as standard costed. The average purchase price includes both the material and the landed cost of the item. This value is stored in the AVERAGE_COST field of the BU_ITEMS_INV record.

Last Price Paid

The system updates this value when stock is put away from purchase receipts. It includes only the material cost of the received item.

Non-Owned Item

See [Chapter 4, “Defining Items,” Defining General Item Information, page 67.](#)

Consigned

If the item is non-owned, indicate whether it is also consigned in this business unit. Although consigned items are physically stocked in the business unit, they are owned by the vendors and are therefore not counted as part of the business unit's total stock owned. They are, however, eligible for all inventory transactions.

Note. The item's designation as non-owned or consigned appears by default from the Define Item - General: Common page, but you can override it. All transactions within PeopleSoft Inventory use the designation for the business unit rather than the designation that is assigned at the setID level.

Vendor ID, Vendor Location

If the item is consigned, you must indicate which vendor supplies the item by entering values. The item can be supplied to this business unit as a consigned item only by the vendor that you assign here. (Other vendors can supply the item as owned.) PeopleSoft Payables extracts this information for the creation of an invoice when the item is consumed.

Note. Consignment vendors must be established on the Procurement Options page (available from the Vendor Information - Location page in the Vendor Setup/Maintenance menu) before they are available for selection here.

See Also

PeopleSoft Managing Costs 8.8 PeopleBook, “Structuring Your Cost Management System,” Setting Up Cost Structure

PeopleSoft Inventory 8.8 PeopleBook, “Receiving and Putting Away Stock”

PeopleSoft Inventory 8.8 PeopleBook, “Managing Consigned Inventory”

PeopleSoft Inventory 8.8 PeopleBook, “Managing Consigned Inventory,” Setting up the System for Consigned Inventory Management

Defining Item Cost Profiles

Access the Define Business Unit Item - General: Costing page.

General Inventory Substitutes Manufacturing Planning Configuration Custom

Common Costing Usage Export Information

Unit: US008 **Item ID:** LT5003 **Standard Unit of Measure:** EA
Wheel Tire, 700x25

Cost Profile Group: 1002 **Raw Material** **Used in Mfg**

Costing Details [Find](#) | [View All](#) [First](#) [1 of 1](#) [Last](#)

Book

Book Name:	FIN	Financial Book
Status:	Active	Ledger Group: RECORDING Ledger: LOCAL

Profile

Profile:	STD	<input type="button" value=""/>	Receipt Cost Method: Standard Cost
Make Profile:	Y	Cost Flow:	First In First Out
		Deplete Cost Method:	Value at Current Standard

Define Business Unit Item – General: Costing page

Used in Mfg (used in Manufacturing)

Select if the item is used in manufacturing.

Scroll through all the books for this business unit to see or set the profile for the item in each of those books. The profile for each book appears by default from the cost profile group that you define on the Define Item - General: Common page.

Profile

The item must have a profile for each book. If no cost profile group is associated with the item, or if a book is not associated with this cost profile group, the field is blank. Otherwise, an error message appears. You can change the profile for an item in a book if the book is not seeded for that item and if you select the Allow Overrides to Profile check box on the Group - Books page.

Note. You cannot use this page to add or delete groups. To add, cancel, or delete books from a business unit, use the Define Inventory - Business Unit Books page.

See Also

PeopleSoft Managing Costs 8.8 PeopleBook, “Structuring Your Cost Management System,” Setting Up Cost Structure

Defining Item Export Information

Access the Define Business Unit Item - General: Export Information page.

Export License Nbr (export license number)

The value is used in situations where the products that are shipped from the business unit fall under a blanket classification of export license commonly known as the general destination license. This is

ECCN (export commodity control number)	the default export license that the system uses for products that do not specifically require export commodity control.
Origin Country	Enter a value if the export control business needs require it.
Region of Origin	Enter the country in which the item was originally manufactured. The system uses this value for Intrastat reporting purposes. The country is generally required for the Intrastat Arrivals Report; however, the PeopleSoft Intrastat Transaction Loader also provides the value in this field for arrival and dispatch transactions. You can enter a specific country code for the item. If you leave the field blank, the transaction loader uses the country code for the shipping inventory business unit as the default origin country for PeopleSoft Order Management and interunit shipment transactions.
See PeopleSoft Purchasing 8.8 PeopleBook, “Defining Purchasing Item Information,” Defining Purchasing Item Vendor Relationship Attributes and Priorities.	

Defining Shipping and Handling Item Attributes

Access the Define Business Unit Item - Inventory: Shipping/Handling page.

The screenshot shows the Define Business Unit Item - Inventory: Shipping/Handling page. The top navigation bar includes tabs for General, Inventory (which is selected), Substitutes, Manufacturing, Planning, Configuration, and Custom. Below the tabs, there are sub-tabs for Shipping/Handling, Replenishment, Weight/Volume, and Utilization Types. The main content area displays item details: Unit: US008, Item ID: LT5003, Standard Unit of Measure: EA, and a description: Wheel Tire, 700x25. There are fields for Ship Via, Stock Type, and InterUnit Par Qty. A dropdown for UOM Conversion Flag is set to Convert to Standard UOM. The Inventory Attributes section contains checkboxes for Staged Date Control, Additional Handling, Isolate Item, and Oversized Item. The Lot Control section includes fields for Availability Lead Time (Days) and Retest Lead Time (Days), both set to 0. At the bottom, there is a link to Assign Item to Zones.

Define Business Unit Item – Inventory: Shipping/Handling page

Ship Via	For material stock requests, if the system does not find a ship via value for the item at the business unit level, then the system uses the ship via that you define at the setID level. Establish ship via codes on the Ship Via Codes page under the Common Definitions menu.
Standard Pack Unit of Measure	The Carton Label and Completion Label processes use this value to determine how many labels to print. The UOMs must first be established on the Units of Measure page in the Common Definitions menu before they are available for selection.

Stock Type	If the item is non-owned, you must select a value to identify the type of stock. Establish stock types on the Stock Types page under the Define Controls menu.
InterUnit Par Qty (interunit par quantity)	<p>Enter the minimum amount of stock that must be on hand in the business unit before the system fulfills interunit transfer requests.</p> <p>For example, suppose an interunit transfer request is made for 100 units of an item that has an interunit par quantity of 50. If the balance on hand in the business unit is 75 units, then only 25 units are available to transfer.</p> <p>PeopleSoft Inventory uses the interunit par quantity when entering material stock requests for interunit transfers and during reservation processing.</p>
UOM Conversion Flag	<p>Select a value for processing transactions using a bar code-enabled system or the Fulfillment Engine feature in PeopleSoft Inventory. Values are:</p> <p><i>Convert to Default Stock UOM:</i> Converts the UOM on incoming transactions to the default stocking UOM.</p> <p><i>Convert to Standard UOM:</i> Converts the UOM on incoming transactions to the item's standard UOM. This value enables you to stock all the inventory in the standard UOM and perform material movement transactions by using any valid UOM for the item.</p> <p><i>Use Entered UOM:</i> Processes transactions with the UOM that the user enters.</p>
Shelf Life (Days)	Enter the number of days that the item can remain in inventory before it is no longer usable. For lot-controlled items, PeopleSoft Inventory uses this value, along with the lot's creation date, to calculate the lot expiration date.
Staged Date Control	This selection appears by default from the Define Item - Inventory: Tracking/Description page.
Isolate Item	Select to restrict the item's putaway or transfer transactions to empty storage locations or to locations containing stock with the same item ID. The option is not valid if the item exists in mixed-item storage locations. Once stock that is marked for isolation is transferred to an empty storage location, you cannot transfer or put away stock with any other item ID until the quantity in the location is fully depleted.
Additional Handling, Oversized Item	PeopleSoft passes these values to the third-party system when calculating freight charges. You can also view this information on the Ship Container Details page.
Availability Lead Time (Days) and Retest Lead Time (Days)	If the item is lot-controlled, the availability lead time specifies the number of days between the lot's creation date and the date that it becomes available; the retest lead time specifies the number of days between a lot's creation date and the date that it needs to be retested. The Complete Putaway process uses these lead times to calculate the lot's availability and retest dates.

Note. Although default values for shelf life and availability and retest lead times for the setID are established on the Define Item - Inventory: Tracking/Description page, PeopleSoft Inventory transactions requiring these parameters use the values that are defined at the business unit level.

Assign Items to Zones

Click to access the Item Zone Assignments page, where you can associate the item with putaway and picking storage location zones that are established for the business unit. Zone assignment is optional; however, it enables much tighter control over the putaway and picking operations.

See Also

PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, “Managing PeopleSoft Supply Chain Management Integration Points,” Purging Transactions

[Chapter 2, “Working With Items,” Using Units of Measure, page 30](#)

PeopleSoft Inventory 8.8 PeopleBook, “Preparing to Implement PeopleSoft Inventory,” Defining Staged-Date Tracking

Associating an Item With Putaway and Picking Zones

Access the Item Zone Assignments page.

Priority

PeopleSoft Inventory uses zone priority levels to determine which storage locations to use when putting away or picking the item. For example, suppose that you assign an item to two putaway zones, specifying that the first priority zone is fast moving goods and the second priority zone is bulk storage. During putaway, the system first tries to place the item into the fast moving goods zone; if there is not enough space in fast moving goods, the system moves on to bulk storage. If you assign these same zones as picking zones, the picking plan directs pickers first to locations in the fast moving goods zone, then to locations in the bulk storage zone.

Zone Code

The options include all zones that are defined for the business unit that are also identified as putaway or picking zones for at least one storage location.

Note. Zone codes (defined on the Storage Zone Codes page under the Inventory menu) and storage location zone assignments (defined on the Zone Assignments page under the Maintain Storage Locations menu) must be established before they are available for selection.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Structuring Inventory,” Establishing Putaway and Picking Zones

PeopleSoft Inventory 8.8 PeopleBook, “Receiving and Putting Away Stock,” Setting Up Putaway Defaults and Rules

PeopleSoft Inventory 8.8 PeopleBook, “Picking Inventory,” Picking Zones

Defining Item Replenishment Attributes

Access the Define Business Unit Item - Inventory: Replenishment page.

Define Business Unit Item – Inventory: Replenishment page

Not Included In Replenishment

Select to exclude the item from being processed by the Replenishment Options process (INPRROPT) and the Replenishment Parameters (INPQRPLP) process for the business unit. For example, select this check box if you use PeopleSoft Supply Planning to handle replenishment.

Include WIP Quantity

Select to enable the Replenishment Options process to add the quantity in WIP storage locations to the quantity that is available when determining whether an item has reached its reorder point.

Note. Items in WIP locations are not considered to be available, so you must select this check box if you want to include WIP quantities in the replenishment calculation.

Replenish Class

Categorizes the items by usage profile. This information is required if the item is included in replenishment processing. Establish replenishment classes on the Replenishment Classes page in the Define Controls menu.

Enter the number of days to use in calculating the item's replenishment values.

Replenish Calc Period (Days) (replenishment calculation period in days)

Enter the average number of days from placement of the purchase order to receipt of the stock. Enter this field manually or let PeopleSoft Inventory calculate it.

Replenish Lead (Days) (replenishment lead time in days)

If the sum of an item's available quantity and its on-order quantity is less than or equal to this value for the item, then the Replenishment Options process generates a replenishment request for restocking purposes. Establish the item reorder point levels or let PeopleSoft Inventory calculate a reorder point.

Reorder Point

Reorder Quantity	Enter the static quantity that is ordered by automated replenishment events. Reorder quantities are subject to vendor minimum and maximum analysis during procurement. If PeopleSoft Inventory calculates a reorder quantity that is less than the reorder point, it resets the reorder quantity to be equal to the reorder point the next time that you save the page. Otherwise, the stock level never rises above the reorder point, and PeopleSoft Inventory is caught in a loop of reordering insufficient quantity.
Maximum Quantity	Enter the maximum stocking quantity for the item.
Safety Stock	Enter a buffer stocking level to guard against unanticipated surges (or spikes) in average daily demand. Establish the item safety stock levels or let PeopleSoft Inventory calculate a statistical safety stock value.
Last Annual Demand	Enter a value for economic order quantity (EOQ) calculations. Enter the last annual demand manually or let PeopleSoft Inventory calculate it.
Economic Order Quantity	Enter a fixed-order quantity to determine the amount of an item to purchase or manufacture at one time. The EOQ should minimize the combined costs of acquiring and carrying inventory. You can use the EOQ as the automated replenishment's reorder quantity. Enter an EOQ value or let PeopleSoft Inventory calculate it.
Desired Stock-In Probability	Enter the percentage of the time that you want stock on hand for an item. PeopleSoft Inventory uses this value in safety stock calculations.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Replenishing Inventory”

Defining Item Weight and Volume Information

Access the Define Business Unit Item - Inventory: Weight/Volume page.

Packing Code	See Chapter 4, “Defining Items,” Establishing Item Shipping and Handling Attributes, page 76.
Packaging Code	Establish packaging codes on the Item Packaging Codes Page under the Set Up Financials/Supply Chain - Product Related - Inventory menu and can be displayed in the Packing Session component in the Fulfill Stock Orders - Shipping menu.
Container Type	Establish container types by using the Container Types component under the Maintain Containers menu.
Stocking Weight and Stocking Volume	Enter the measurements for the item, plus any external straps, containers, pallets, or packing material that you use to stock the item. Enter values based on the UOM.

Note. If you change the stocking weight and volume, you must recalculate capacity for the storage locations where capacity is tracked. For each storage location where the item is stored, select the Calc capacity at save time option on the Volume/Weight Capacity Checking page.

Shipping Weight and Shipping Volume

Enter the stocking measurements, plus any packing material or container measurements that you need for shipment. Enter values based on the UOM.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Structuring Inventory,” Checking Storage Location Capacity

Defining Item Utilization Types

Access the Define Business Unit Item - Inventory: Utilization Types page.

General		Inventory		Substitutes		Manufacturing		Planning		Configuration		Custom																																								
		<u>Shipping/Handling</u>		<u>Replenishment</u>		<u>Weight/Volume</u>		<u>Utilization Types</u>																																												
Unit:	US010	Item ID:	10012							Standard Unit of Measure:	EA																																									
Pro5500 Road Helmet																																																				
Utilization Types <div style="text-align: right;"> Find View All First Last 1 of 2 </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>*Utilization Group:</td> <td style="text-align: right;">CYCL <input type="button" value="🔍"/></td> <td>Cycle count default</td> </tr> <tr> <td>Utilization Type:</td> <td style="text-align: right;"><input type="button" value="🔍"/></td> <td></td> </tr> <tr> <td>Last Cycle Count:</td> <td>04/21/2000</td> <td>Cyc Interval (days):</td> <td colspan="8"></td> <td>Next Cycle Count:</td> </tr> <tr> <td>Last Physical Count:</td> <td colspan="2"></td> <td colspan="8"><input type="checkbox"/> For Planning</td> </tr> <tr> <td>Family:</td> <td>PRO</td> <td colspan="2"></td> <td colspan="8"><input checked="" type="checkbox"/> For Cycle Count</td> </tr> </table>												*Utilization Group:	CYCL <input type="button" value="🔍"/>	Cycle count default	Utilization Type:	<input type="button" value="🔍"/>		Last Cycle Count:	04/21/2000	Cyc Interval (days):									Next Cycle Count:	Last Physical Count:			<input type="checkbox"/> For Planning								Family:	PRO			<input checked="" type="checkbox"/> For Cycle Count							
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Last Physical Count:			<input type="checkbox"/> For Planning																																																	
Family:	PRO			<input checked="" type="checkbox"/> For Cycle Count																																																

Define Business Unit Item – Inventory: Utilization Types page

Utilization Group

Select the utilization group to which this item belongs. Utilization groups are set up on the Items – Define Controls – Utilization Groups page.

Utilization Type

The Utilization Type Calculation process assigns a type to an item. The system uses utilization types in conjunction with the due to count option for cycle counts.

Last Cycle Count, Cyc Interval (days) (cycle interval days), and Next Cycle Count

PeopleSoft Inventory considers the item's last cycle count date and cycle interval days and then automatically calculates the next cycle count date when you launch the page.

Note. If the business unit requires closure-calendar validation and processing for materials management activities as defined on the Closure Calendar page, and if the next cycle count date falls on a defined closure date, then the system returns the first future valid date defined for the function.

Last Physical Count

The value from the Stock Quantity Update process.

For Planning

Select to indicate if this is the default utilization group for inventory planning. This default is established on the Util Group Inv (Inventory Utilization Group) page, but can be overridden on this page.

For Cycle Count

Select to indicate if this is the default utilization group for cycle counts. This default is established on the Util Group Inv page.

See Also

[Chapter 3, "Defining Item Control Values," Defining Utilization Types, page 64](#)

PeopleSoft Inventory 8.8 PeopleBook, "Performing Physical Accounting"

PeopleSoft Inventory 8.8 PeopleBook, "Performing Physical Accounting," Calculating Utilization Type Classifications

Defining Manufacturing Information for an Item

Access the Define Business Unit Item - Manufacturing: General page.

Define Business Unit Item - Manufacturing: General						
General Inventory Substitutes Manufacturing Planning Configuration Custom						
General WIP Replenishment						
Unit:	US008	Item ID:	LT5000	Standard Unit of Measure: EA		
Standard Wheel Subassembly						
Production Area:		<input type="text"/>	<input type="button" value="Search"/>	<input type="checkbox"/> Calc Comp Yield at Completion	Component Issue Method	
Source Code:		Make	<input type="button" value="Search"/>	<input type="checkbox"/> Phantom Item	<input type="radio"/> Issue	<input type="radio"/> Kit
Average Order Qty:		50.0000		BOM Usage		
Associated Primary BOM:		LT5000	<input type="button" value="Search"/>	<input checked="" type="checkbox"/> Revision Control	<input type="radio"/> By Effectivity Date	
				<input checked="" type="checkbox"/> Auto Revision	<input type="radio"/> By Revision	
Master Routing Option <input checked="" type="radio"/> Item <input type="radio"/> Item Group <input type="radio"/> Item Family Reference Routing Item: LT5000 <input type="button" value="Search"/>				Production Option Control <input checked="" type="radio"/> Use BOM/Routing Defaults BOM Code: <input type="text"/> <input type="button" value="Search"/> <input type="radio"/> Use Prdn Option Maintenance Routing Code: <input type="text"/> <input type="button" value="Search"/> <input type="checkbox"/> Valid Production Options only		

Define Business Unit Item – Manufacturing: General page

Production Area

PeopleSoft Product Configurator uses this as the default production area for configured items, and it also uses it to search for the item's production options. PeopleSoft Supply Planning use the production area that is defined here when the system creates planned production orders and when the business unit and item aren't associated with a production area.

Note. You must create a production area and associate the item with it before specifying the production area information by using this page.

Calc Comp Yield at Completion (calculate component yield at completion)

Select this option to calculate component yield automatically when recording a completion at an operation, a completion to stock, or an assembly scrap. If you do not select this option, the system doesn't calculate component yield at completions. If you want to calculate component yield manually, clear the check box and enter component yield by editing components during the Completions process by using the Edit/Issue Components component.

Source Code

Select a value:

- *Buy:* Items that you typically purchase.
- *Expense:* Non-inventory items for which you do not maintain quantity on hand.
- *Floor Stck* (floor stock): Items that you maintain in inventory, but don't expense until you issue them to production. These might represent low-cost items that issue in bulk to production and do not monitor for cost or quantity on hand. Both floor stock and expense items can be specified as components on a BOM but are not issued to production, considered in planning, or included in the assembly item's cost. You cannot create BOMs, routings, production IDs, or production schedules for floor stock or expense items.

Floor stock items cannot be identified as serial in production or the trace usage cannot be set to serial or lot.

- *Make:* Assemblies or subassemblies that you manufacture in house, at a subcontractor, or both. For this source code, select the Phantom Item option to issue all components for this item, instead of issuing the item itself, within PeopleSoft Manufacturing.

Important! The source code for serial in production or trace usage items must be Make or Buy.

- *Planning:* Non-inventory items that can represent a family or group of inventory items for which you do not maintain quantity on hand. Planning items can have a planning BOM or planning routing and can be components on a planning BOM. However, you cannot specify planning items on a production or engineering BOM or routing, or use them as a component in production.

Note. Because you define expense and planning items as non-inventory items at the setID level, many of the attributes are not applicable, and all fields except the Business Unit, Item ID, and Source Code are unavailable.

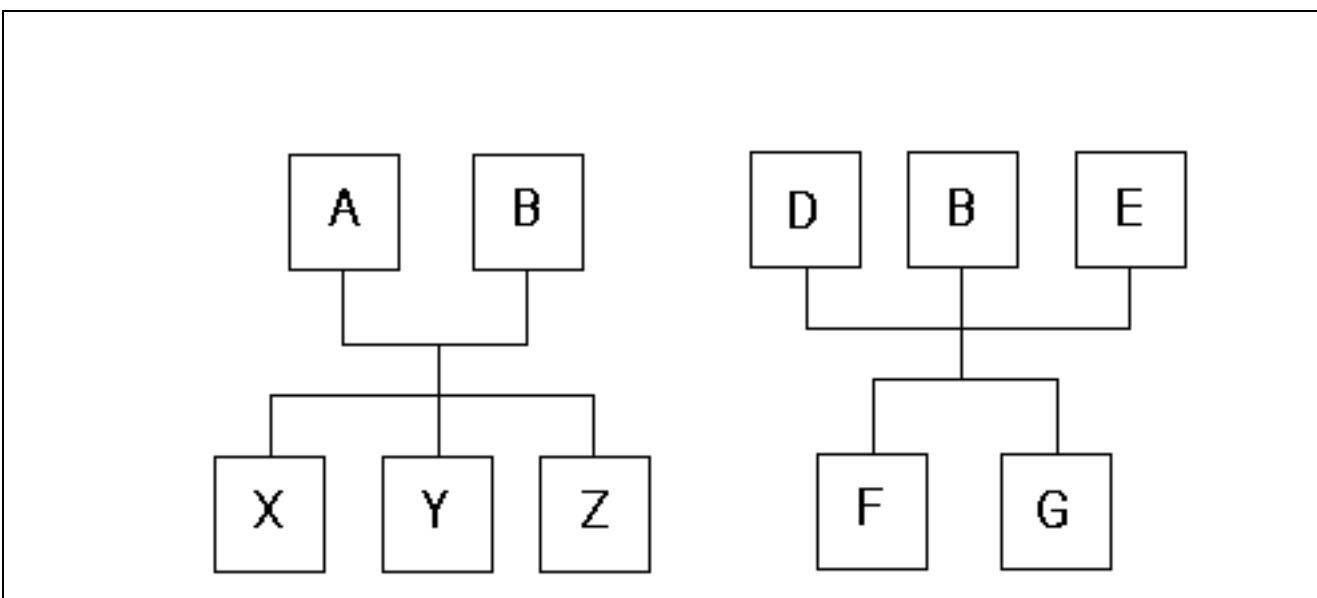
Average Order Qty

(average order quantity)

The typical batch or lot size that is used to produce this item. PeopleSoft Managing Costs uses this value when calculating per unit setup, fixed-run, and post production conversion costs. The system determines each cost by dividing the cost of each process by the average order quantity (AOQ). Typically, it calculates these costs at the operation level, then adds the costs for each operation together to provide the total cost. When the production order quantity differs from the AOQ here, and when the per unit setup, fixed run, and post production conversion costs differ as well, the system calculates a labor and machine and a material lot size variance. The Linear Programming solver in PeopleSoft Supply Planning uses the AOQ as a standard lot size.

Associated Primary BOM

If you use multiple outputs, it's possible that a given co-product can be created in more than one way; in other words, an item is a co-product on more than one item's primary BOM. By assigning an associated primary BOM to a co-product, you tell the system which BOM to use in exploding the co-product to the next level.



Example: Two processes with the same co-product

In the first structure, A is the primary item, B is the co-product, and X, Y, and Z are the components. In the second structure, D is the primary, B and E are the co-products, and F and G are the components. Since there are two ways of making the same product, you need to decide which structure to use when exploding to lower levels. Therefore, you need to signify a primary structure (Associated Primary BOM) that is associated with each item that may exist as a co-product but not as a primary. In order to do this, you can assign B's associated primary BOM as either A or D. If B has its own BOM structure and you want to use that structure when exploding to lower levels, then you can leave B's associated primary BOM as B.

Component Issue Method

Defines how to issue the item to the shop floor. If you define an item's component issue method as *Use Component's Method* for a production area on the Production Area/Item page, the system uses the component issue method that you define here.

Issue	Enables you to generate a picking plan and use PUSH or PULL to issue material directly from PeopleSoft Inventory to the operation's work center. The operation's work center for the component is defined on the routing.
Kit	Enables you to issue components directly to a production ID. As in the production issue method, you use a picking plan to list the required items. The items are then assembled into batches for each order. The material is charged to the production order when it is issued.
Replenish	Enables you to stock components in the WIP locations that are associated with the work center in which you use the components. The item is typically stocked to a maximum stocking level. When the quantity on hand falls below the replenishment point, a notification is sent to the stockroom.
BOM Usage	<p>If you change from not maintaining revision control to maintaining revision control, and if you create one or more BOMs for the item, then you must make sure that the effectivity dates on the BOMs align with the effectivity dates on the revisions.</p> <p>If you don't select the Revision Control option, then the BOM Usage group box is unavailable for entry and By Effectivity Date appears by default for BOM usage.</p>
<hr/>	
Revision Control	If you select this option, and BOMs exist for the assembly item, then the dates for the components that are specified in the BOMs must be aligned with the dates within the revisions. If you select this option, you can select By Effectivity Date or By Revision to define how you want to maintain a BOM for this item. A BOM for the item need not exist for you to make this choice. You can always clear this option without deleting any revisions for the item.
By Effectivity Date	You can enter dates on which components are in effect for an assembly's product structure when maintaining BOMs by using the BOM Maintenance Summary and Component pages. The system validates these dates so that they align with item revision dates.
Auto Revision	If you select Revision Control, you can select this option. Selecting it indicates that revisions for the item can be automatically generated by using a scheme that is defined at the business unit level. If revisions are already created manually with the Revision Maintenance component, then the system uses the revision scheme to select the next available revision. If you want the system to create item revisions automatically, you can use the mass maintenance process in either PeopleSoft Manufacturing (by using the BOM Mass Maintenance by Mass Maintenance Code component) or PeopleSoft Engineering (by using the BOM Mass Maintenance by Engineering Change Order component). The mass maintenance process only creates revisions for those items that have both Revision Control and Auto Revision selected.

By Revision	You can associate effective and obsolete revisions with components by using the BOM Maintenance and Component pages. Specify revision dates on the Rev Maintenance page.
Item	Select to link an item directly to the routings of the item that you select in the Reference Routing Item field. The default is the item itself.
Item Group	Select to link the routings of a reference routing item to an item group. Before you use this option, define item group routings on the Group Rtg Assignment page
Item Family	Select to link the routings of a reference routing item to an item family. Before you use this option, define item group routings on the Family Rtg Assignment page.
Production Option Control	Determines if the system uses BOM/routing defaults or uses production option maintenance. By using this page, you control how you define production options at the business unit and item level. This information is used by Supply Planning to extract data based on the option that you select from these two choices.
Use BOM/Routing Defaults	<p>Select this option if specific BOM/Routing combinations are not required. In addition, it's possible to limit the number of BOM/routing combinations that are extracted to PeopleSoft Supply Planning by using the BOM and Routing fields in the Production Option Control group box. If you select this option, first create BOM and routing codes for an item, and then use the Production Option Maintenance component to link the BOM and routing codes together and (optionally) assign them to production areas.</p> <p>If you select this option, you cannot access the Production Option Maintenance component for the item, but you can still limit the production options that are created in PeopleSoft Supply Planning by selecting a BOM code, a routing code, or both.</p>
Use Prdn Option Maintenance (use production option maintenance)	<p>Select this option if you want to define specific BOM/routing combinations that can be extracted to PeopleSoft Supply Planning or used to create production IDs and production schedules. In addition, you can effective-date the BOM/routing combinations (for example, if you want to handle seasonal variations in the product mix).</p> <p>If you select this option, first create BOM and routing codes for an item. Next, use the Production Option Maintenance component to link the BOM and routing codes together and (optionally) assign them to production areas.</p> <p>Select the Include in Planning check box to specify which BOM/routing combinations the Production DataLink sends to the Planning engine.</p> <p>Finally, create production IDs and production schedules for the item.</p>
BOM Code and Routing Code	Enter values to limit the number of BOM and routing combinations that the system extracts to PeopleSoft Supply Planning.
Valid Production Options only	If you select Use Prdn Option Maintenance, select this option only if you want to use predefined production options when creating production IDs.

Do not select it if you want to be able to specify, in the Production ID Maintenance component, BOM/routing combinations that are not defined with the Production Option Maintenance component.

With either option (using production option maintenance or using BOM/routing defaults), you can create specific BOM/routing combinations for PeopleSoft Supply Planning. By selecting a specific BOM code and a routing code, you can limit the number of BOM/routing combinations that are extracted by PeopleSoft Supply Planning. For example, by picking a specific BOM code and routing code, you eliminate all but this specific combination from consideration. At the other extreme, if you leave both fields blank, the PeopleSoft Supply Planning extracts all possible combinations. Here is an outline of the production options that are created by selecting various BOM code and routing code combinations:

BOM Code and Routing Code Settings	Production Options Created
Both BOM code and routing code are blank.	The system creates a production option for every possible BOM/routing combination.
A BOM code is selected but the routing code is blank.	The system creates a production option for all routing codes with the specific BOM code selected.
A routing code is selected and the BOM code is blank.	The system creates production options for all BOMs with the specific routing code selected.
Both a routing code and a BOM code are selected.	The system creates one production option for the single specified BOM/routing combination.

See Also

PeopleSoft Manufacturing 8.8 PeopleBook, “Setting Up Production Areas”

PeopleSoft Manufacturing 8.8 PeopleBook, “Maintaining Component Lists”

PeopleSoft Manufacturing 8.8 PeopleBook, “Maintaining Bills of Material,”
Assigning Associated Primary BOMs

PeopleSoft Manufacturing 8.8 PeopleBook, “Defining Your Business Unit Structure”

PeopleSoft Manufacturing 8.8 PeopleBook, “Structuring Routings”

PeopleSoft Manufacturing 8.8 PeopleBook, “Defining Your Business Unit Structure,” Setting Up Manufacturing Business Unit Production Options

Setting Up Item Replenishment Defaults

Access the Define Business Unit Item - Manufacturing: WIP Replenishment page.

General	Inventory	Substitutes	Manufacturing	Planning	Configuration	Custom	
<u>General</u> WIP Replenishment							
Unit:	US008	Item ID:	LT5000	Standard Unit of Measure:	EA		
Standard Wheel Subassembly							
Repl Point:	0.0000	Iss Mult:	50.0000				
WIP Min Qty:	0.0000	Repl Max Qty:	0.0000				
WIP RPL Mode:	Kanban Card	WIP RPL Type:	Reusable				
WIP RPL Source:	Feeder						
Prdn Area:	SUBASSY						

Define Business Unit Item – Manufacturing: WIP Replenishment page

When creating replenishment requests or Kanban cards, the system checks whether production replenishment location defaults exist first, then looks to the WIP replenishment defaults that you set up for replenishment guidelines.

Repl Point (replenishment point) and **Iss Mult**(issue multiple)

Enter a value if you are using production replenishment as the component issue method. When the quantity that is on hand in the WIP location drops below the specified replenishment point, the system issues a workflow replenishment request indicating that additional material needs to be supplied, using the issue multiple that you specify here. If you use PeopleSoft Flow Production, the system uses the issue multiple for the Kanban quantity. If you do not have PeopleSoft Flow Production installed, the system uses only the Repl Point for items that have a WIP replenishment mode of Backflush-Controlled.

Repl Max Qty
(replenishment maximum quantity), **WIP RPL Mode**(WIP replenishment mode), and**WIP RPL Type** (WIP replenishment type)

If you don't use PeopleSoft Flow Production, the WIP fields are unavailable for entry. In this case, the system uses defaults for a WIP replenishment mode of *Backflush Controlled* and a replenishment method of *Workflow*.

If you use PeopleSoft Flow Production, enter a replenishment maximum quantity to set the maximum amount of the item that you want stored at any WIP location using the item. It includes the item's on-hand quantity and any open requests that are already made. The system issues a warning if you perform a replenishment transaction that exceeds the replenishment maximum quantity. The replenishment maximum quantity is available for only those items that use the manual replenishment mode.

PeopleSoft Flow Production uses the WIP RPL Mode to determine how to generate replenishment requests for this item. Options include:

Backflush Controlled: You consume components from the WIP location while backflushing completions. When the quantity on hand falls below the replenishment point, the system automatically generates a replenishment request to bring the on-hand quantity back above the replenishment point. The replenishment request is a multiple of the issue multiple. For example, if the replenishment point is 60, the on-hand quantity is 30, and the issue multiple is 20, then the system generates a replenishment request for 40 to bring the on-hand WIP location quantity back above the replenishment point.

Kanban Card: The replenishment process uses Kanban cards as a manual request for material. In this scenario, Kanban cards are either entered or imported into the system and then printed out. A Kanban card is attached to a box of components; as components are used on the production line, you place the Kanban cards in a Kanban holder. The Kanban cards are picked up periodically at the WIP location and taken to a Kanban sorting room or to the source location (such as inventory, feeder line, or vendor) on the card to get the components.

Manual: You have a visual indicator that the WIP location needs replenishment, and you scan in the item ID and WIP location to generate a replenishment request for the specified issue multiple. This request includes the replenishment quantity and source location that is associated with that item and WIP location. This is largely used with electronic data collection.

WIP RPL Source (WIP replenishment source)

Determines where you send the PeopleSoft Flow Production replenishment request and what source supplies the WIP location. Options include:

Feeder: A feeder line creates subassemblies that it feeds into the main production line. Once you use a certain quantity of the subassemblies, you send a replenishment signal to start production on the feeder line.

If you select this option, select the WIP production area that serves as a feeder line for this item.

Inventory: Replenish the WIP location directly from an inventory location.

Vendor: Use vendor replenishment to replenish the WIP location by directly receiving purchased components from a vendor. If you select this option, select the vendor ID and vendor location that directly replenish this item. You can override this prior to dispatch if necessary.

WIP RPL Method (WIP replenishment method)

Designate how the PeopleSoft Flow Production replenishment request is communicated. You must select *Backflush* or *Manual* as the WIP replenishment mode to use WIP replenishment methods. For vendor replenishment, there is a separate replenishment method and none of these options are used. The available WIP replenishment method options include:

Workflow: The system generates a worklist entry that takes you to the Production Replenishment worklist and uses defaults for the item, quantity, and from/to WIP locations. You can override the values to complete the transfer.

Pull Ticket: You create a one time replenishment request through either a backflush or a manual scan and run the Pull Ticket print process to print the pull ticket. This is similar to a one time Kanban card. You scan in the Kanban ID, and the system supplies the default item, Kanban quantity, source, and WIP location information.

Pull List: A pull list is a list of Kanban requests that you use in a manner similar to the way you use a pick list. You scan in Kanban IDs to transfer quantities. You run the Pull List process on a scheduled basis, which picks up all new requests. As you do with pull tickets, you scan in the Kanban ID from the pull list to process each request.

Source Location

If you select *Inventory* as the WIP replenishment source, this field is available for entry. Select the source storage location that replenishes this item. The location field is not mandatory but, if entered, must be a valid location. The storage levels that appear depend on the storage structure that is established on the Inventory Options page under the Set Up Financials/Supply Chain - Business Unit Related - Inventory menu.

See Also

PeopleSoft Manufacturing 8.8 PeopleBook, “Understanding PeopleSoft Manufacturing,” Flow Production
PeopleSoft Inventory 8.8 PeopleBook, “Structuring Inventory,” Searching for Storage Locations

Specifying Planning Information for an Item

Access the Define Business Unit Item - Planning: General page.

Define Business Unit Item – Planning: General page

Planner Cd (planner code)

Planner codes are used to filter information in most pages and processes in PeopleSoft Supply Planning. Third-party forecasting applications also use planner codes. You set up planner codes by using the Planner Code page on the Set Up Financials/Supply Chain - Product Related - Planning menu.

Planned By

Select one of these methods:

Distribution Planning: Select this option if you want to include the item in the distribution plan. The distribution plan typically displays the tasks and that are quantities associated with the movement of the item throughout the distribution and manufacturing business units of the supply chain. Distribution-planned items are included in the PeopleSoft Supply Planning data model.

You should select this option if the item is planned across multiple business units and is either a transfer or purchase item. A distribution-planned item is most likely a finished good or spare part that is used to fulfill customer demand at an inventory-only business unit.

Master Planning: Select this option if you want to include the item in the master plan. The master plan provides a schedule of planned orders for the item at each manufacturing site.

Typically, master-planned items are the top-level, finished-good manufactured items. Master-planned items can be included in either PeopleSoft Supply Planning models. You use the Manufacturing Business Unit Options page to specify which model (Supply Planning) includes the master plan.

When the master plan is included in the PeopleSoft Supply Planning model, the system models production in a collapsed, aggregate view of all production capabilities for the item that is associated with the business unit. In addition, new planned orders and rescheduled messages for production can be returned from the planning server.

When the master plan is included in the PeopleSoft Supply Planning model, the system models production based on the detailed bills and routings that are defined for the item in PeopleSoft Manufacturing.

Material Planning: Select this option if you want to include the item in the material plan. The material plan schedules the raw materials and subassemblies that are required, supporting the production of finished goods. Material-planned items are included in the PeopleSoft Supply Planning model only.

Not Planned: Select this option if you do not want to include the item in any of the PeopleSoft Supply Planning generated plans.

Demand Planning Item

Select to indicate that this item is available to be downloaded from PeopleSoft Supply Chain Management tables into PeopleSoft Demand Planning.

Inventory Policy Planning Item

Select to indicate that this item is available to be downloaded from PeopleSoft Supply Chain Management tables into PeopleSoft Inventory Policy Planning.

Use Ship To Locations

Select this option if you want to model sourcing requirements for new planned purchase orders based on the ship to location information that is established for vendors within PeopleSoft Purchasing. By using the ship to location information, you can establish specific purchasing sourcing definitions for a single inventory business unit. If you don't select this option, the system bases the sourcing requirements for new planned orders on the item/vendor information. This information is used by the PeopleSoft Supply Planning solvers for modeling purposes.

Spot Buy

Select to indicate that this item is used by PeopleSoft Strategic Sourcing. This information is used by PeopleSoft Supply Planning solvers for modeling purposes.

Defining Generation of Item Supply Information

Access the Define Business Unit Item - Planning: Fences/Lead Time page.

General	Inventory	Substitutes	Manufacturing	Planning	Configuration	Custom
General Fences/Lead Time Forecast Order Modifiers						
Unit:	US008	Item ID:	SR1001	Standard Unit of Measure:	EA	
Omega 500 Touring Bike						
Planning Time Fence [days]:	7.00	Safety Stock Level:	<input type="text"/>			
Action Message Cutoff [days]:	60.00	Excess Stock Level:	<input type="text"/>			
Reschedule In Factor [days]:	<input type="text"/>	Fixed Period (days):	<input type="text"/>			
Reschedule Out Factor [days]:	<input type="text"/>	<input checked="" type="checkbox"/> Use Global Early Fence				
Early Fence:						
Production Lead Times						
<input type="checkbox"/> Use Lead Time						
Fixed Lead Time:	0	Hours	Variable Lead Time:	0	Hours	<input type="text"/>
New Order Fence (days)						
Released Order:	999	Firmed Order:	<input type="text"/>			

Define Business Unit Item – Planning: Fences/Lead Time page

Planning Time Fence [days] Identifies when changes or recommendations for an item are difficult to react to. You typically set this time fence to the cumulative lead time of the item.

When generating messages, any message for an order with a start date that's equal to or less than the planning time fence receives a status code of *Before Planning Time Fence* in the appropriate review page in PeopleSoft Manufacturing, Inventory, or Purchasing. This alerts you to changes occurring early in the planning horizon that can be difficult to react to.

Action Message Cutoff [days] Tells the Receive Planning Messages process to stop creating action messages. The system generates recommendations for new orders only after this time fence. It doesn't generate recommendations for cancellations or reschedules.

When generating messages for new orders, any message for a planned order with a start date that is greater than the action message cutoff time fence receives a status code of *After Cutoff Fence*.

PeopleSoft Supply Planning uses message filters to reduce the number of planning system messages that require review in PeopleSoft Manufacturing, Inventory, Purchasing, and Order Management. Each filter has a set tolerance that tells the system whether or not the message is automatically approved.

Reschedule In Factor [days] and Reschedule Out Factor [days] Tolerances for recommendations to move an order. For example, if you set both factors to 5 and the production date is December 10, then planning automatically approves any order between the reschedule in date of December 5 and the reschedule out date of December 15 without going to the appropriate review page. This applies only if the change is a reschedule.

Safety Stock Level The quantity of the item that you keep on hand to buffer against stock outages. If you want to change the safety stock level from period to period, you can set up a time-phased safety stock level on the Stocking

Periods page in the Define Controls menu. PeopleSoft Supply Planning always use the Stocking Period record first. If no record exists there, then the system uses the static quantity that you enter in the Define Business Unit Item Planning: Order Modifiers page..

Excess Stock Level

The upper limit that you place on the quantity of the item to buffer against overstocking. You can also define excess stock levels (along with safety stock) on the Stocking Periods page.

Fixed Period [days]

Determines how far the system looks ahead for demand as you determine the amount of supply that is required during the creation of a new supply order. PeopleSoft Supply Planning use this value when generating all supply (production, purchase, and transfer). When using the fixed period value, the system respects the order modifiers (minimums, maximums, and multiples) that are defined by using the Define Business Unit Item - Planning: Order Modifiers page.

Use Global Early Fence

Select to indicate that the system will use the early fence value defined on the Load Planning Instance component.

Early Fence

Enter a number of days (negative or positive), which will be used from any planning date to determine a boundary before which planning solvers make no changes to supply or demand tasks. For example, if the current planning date is January 15, 2000 and the early fence is set to 2, then the planning solver will make no changes to supply or demand tasks before January 17, 2000.

Production Lead Times

If you don't define any lead times, the PeopleSoft Supply Planning models both expect either an enterprise routing or a production routing, respectively, to exist in order to define the run rates when planning production.

New Order Fence

Define how the system uses the order start date to assign statuses to planned production orders that are received from a planning engine session. If you leave both fields in this group box blank, the system assigns the entered status to all new planned orders.

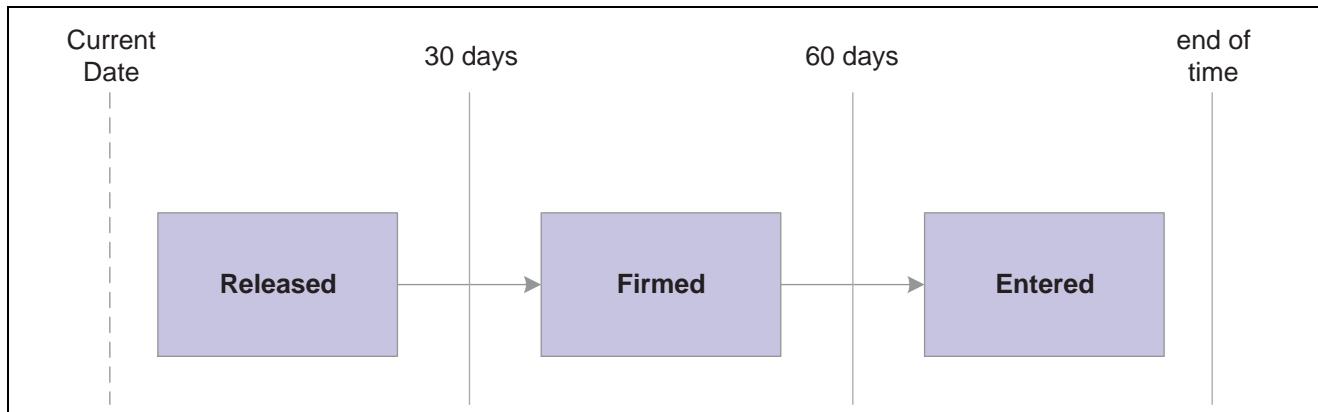
To create all planned orders in the *Released* status, you can enter a value of 999 for the Released Order fence field and leave the Firmed Order fence field blank. Alternatively, to create all planned orders in the firmed status, enter a value of 999 in the Firmed Order fence field and leave the Released Order fence field blank.

If you put a value in the Released Order fence field and nothing in the Firmed Order fence field, then all the planned orders that fall between the day that you run the Receive Planning Messages process and the released order fence days are created in the *Released* status. The planned orders that are scheduled after that day are created in the *Entered* status.

When you review planning messages by using one of the planning message pages, the system determines the status of new planned orders based on these fences that are defined for the items. You can change the status during the planning message review process.

Released Order Indicates the number of days from the current date that the system sets planned orders to the *Released* status when planning messages are received, reviewed, and applied.

Firmed Order Sets up the number of days to which all new planned orders are created in the *Firmed* status. The system creates all planned orders that are scheduled after the firmed order fence in the *Entered* status.



New order fence example

Suppose that you set a released order fence of 30 days and a firmed order fence of 60 days; then the system creates all new planned orders with start dates that fall between the current date and 30 days in the future as *Released*. The system creates all planned orders with start dates that fall between 31 and 60 days as *Firmed*, and all planned orders beyond 60 days as *Entered*.

Defining Item Forecast Parameters

Access the Define Business Unit Item - Planning: Forecast page.

The screenshot shows the 'Planning' tab selected in the top navigation bar. Below it, the 'General' tab is active. The page displays item details and forecast parameters. Item details include Unit: US008, Item ID: SR1001, and Standard Unit of Measure: EA. The Omega 500 Touring Bike is listed under Item ID. Forecast parameters include Forecaster: UNITEDST, Demand Time Fence [days]: 45.00, Forecast Adjustment Action: No Adjustment, and Forecast Fulfillment Size: (empty field). Under 'Explode Demand for Consumption', the 'Explode Demand' checkbox is checked. Under 'Forecast Consumption Method', the 'Stock Request' checkbox is checked. Other consumption methods like Sales, Production, Transfer, and Extra Demand are listed but not checked.

Define Business Unit Item – Planning: Forecast page

Forecaster	Enables you to restrict, or segment, the demand data extracts to these item-forecaster records for PeopleSoft Demand Planning. You define forecasters by using the Forecaster page accessed from the Demand Planning - Demand Parameters - Set Forecaster Defaults menu item.
Demand Time Fence [days]	Manages forecast consumption in the planning process. It is often set to the finishing lead time for an item, based on the current system date plus the demand time fence for the item. Before the demand time fence, forecast is ignored: only actual orders are used as demand. After the demand time fence, the greater of actual orders or forecast consumption is used as demand.
Forecast Adjustment Action	Select an action to indicate how the forecast is allocated for PeopleSoft Supply Planning. Forecast adjustment alters the next forecast planning bucket quantity to match the known actual demand. This is done by taking the unconsumed forecast from before the demand fence and prorating the unconsumed forecast to periods after the demand fence. Various actions are available to control how the unconsumed forecast is to be prorated.
Forecast Fulfillment Size	Define the numerical value that you want to use when dividing the total forecast demand into portions that make up task quantities. PeopleSoft Supply Planning use the fulfillment size when they attempt to meet certain portions of the forecast if the total forecast cannot be met entirely. The system divides net forecasts into tasks that are associated with the original planning period, and each task represents a portion of the quantity that is required to meet the forecasted demand. These tasks represent the movable portions of a forecast when making a feasible plan and allow the system to reschedule top-level demand.
Explode Demand for Consumption	Select this option if you use: PeopleSoft Supply Planning and you want to explode sales order demand or transfer demand for forecast consumption at the inventory item level. If production demand forecasts exist, the system explodes sales order demand or transfer demand for some end items by calculating the production demand that is to be used for forecast consumption. If you don't select the check box, the system doesn't explode the sales orders or transfer orders for the item.
Aggregate Demand	Identifies the item as representing a group of items for forecast consumption. For an aggregate demand item, you establish aggregate demand children. The forecast for the aggregate demand children is rolled up to one demand total for the aggregate demand item. Forecast consumption is then performed at the aggregate-item level rather than at the individual-item level. You can identify both planning items and inventory items as aggregate demand items.
Forecast Consumption Method	Select the types of demand that PeopleSoft Supply Planning will use to consume the forecast.

Defining Planning Order Modifiers

Access the Define Business Unit Item - Planning: Order Modifiers page.

Define Business Unit Item – Planning: Order Modifiers page

Transfer Attribute

Transfer order modifiers that you enter are used as defaults on the Inventory Transfer Attributes pages that establish relationships between business units (destination and sourcing) and items. Order modifiers on the Inventory Transfer Attributes pages take precedence over order modifiers that are defined at the item level.

Transfer Yield and Purchase Yield

The usable output, expressed as a percentage. This is used in planning to inflate the planned quantity on transfers or production orders to account for any loss that may occur during transport or production. For example, if you're expecting the yield of quality items from a transfer to be 90 percent of the delivered items and you need 90 items, then you should order 100 items to fulfill requirements.

Defining Business Unit Attributes for Configured Items

Access the Define Business Unit Item - Configuration page.

General	Inventory	Substitutes	Manufacturing	Planning	Configuration	Custom
Unit: US008	Item ID: LT5011	Standard Unit of Measure: EA				
Custom Road Bicycle Wheel						
Rules Attributes - Components <div style="display: flex; justify-content: space-around;"> <input checked="" type="radio"/> Rule Based <input type="radio"/> Standard BOM </div> <div style="border: 1px solid #ccc; padding: 2px; width: 150px; margin-top: 5px;"> Reference BOM Item: </div>			Additional Attributes <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="flex: 1;"> MFG Business Unit: <input type="text"/> </div> <div style="flex: 1; text-align: right;"> Ship Via: <input type="text"/> </div> </div> <div style="margin-top: 10px;"> Configuration Lead Time Hrs: <input type="text" value="0.00"/> </div>			
Rules Attributes - Operations <div style="display: flex; justify-content: space-around;"> <input checked="" type="radio"/> Rule Based <input type="radio"/> Standard Routing </div>						

Define Business Unit Item – Configuration page

Rules Attributes - Components

Rule Based

Indicates the component lists for production IDs that are based on component list rules that are carried out during production configuration. If a standard BOM exists for the item, the system doesn't use it to create production; the system includes only components that are identified by component list rules with the production ID.

Note. When you select this option, create at least one component list rule for that item.

Standard BOM

Indicates the component lists for production IDs that are based on predefined standard BOMs. The system includes all components on the BOM on the component list for the production ID. The system might encounter a component list rule during the production configuration process. If the system interprets the condition for the rule as true, it includes the component list with the standard BOM.

Reference BOM Item

Enter an item whose BOM you want to use when the system produces this item. When you enter a value, the system ignores the current item's BOM. Use this field only for components that are based on a standard BOM. When the system uses components based on a standard BOM, it includes all components from the BOM for this item in the component list for the production ID.

Additional Attributes

MFG Business Unit

Enter business unit attributes; otherwise, the configuration process uses the setID values. The system uses business unit attributes to point to the business unit that produces the item and in distribution sites that don't produce the item.

Ship Via

Identifies the method of moving configured items between business units. This code identifies lead times to take into consideration for lower-level configured items that are manufactured in separate business units.

Configuration Lead Time Hrs (configuration lead time in hours)

Enter the average production time that is required for manufacturing the configured item. The production configuration process uses this lead time field to determine estimated start and due dates for production IDs.

Rules Attributes - Operations

Rule Based	Indicates to use operation lists for production IDs based on Operation List rules. Rules identify which routing operations to use from predefined routings. It is not necessary to use all operation sequences on the standard routing.
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Note. Whether you use rule-based or standard routing, you must set up a routing. Rule-based routing enables the selection of steps to use.

Standard Routing	Indicates to use operations that generate operation lists based on standard predefined routings. The production ID's operation list includes all operation sequences on the standard routing.
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Processing Items with BOMs and Component Lists

PeopleSoft Product Configurator enables you to process a standard BOM and a component list rule when an item is in production.

To process an item with a BOM and a component list rule:

1. Create a standard BOM for the item on the BOM Maintenance page (Manufacturing, Maintaining Bills of Materials).
2. Select the Standard BOM option, and then include the reference BOM Item on the Define Business Unit Item - Configuration page.

The reference BOM refers to BOMs that you create for the item in step one. To review this BOM, select the item ID on the BOM Maintenance page.

3. Create a component list for the item on the Component List page, and then add the component list to the production model for the item on the Model page.

Materials from the standard BOM that you create in step one and from the component list that you create in step three are now associated with the item.

To verify that the setup is correct:

1. Create a configured direct order for the item on the Configuration Orders page.
2. Order the item by using the Order Entry Form page, and then configure the item on the Order Entry Form - Configuration page.
3. Run a production request for the item on the Production Request page.
4. Obtain the production ID for the item on the Direct Production page.
5. Enter the production ID that you obtain in step four and the business unit on the Component List Maintenance page, and then click the Search button.

A list of components for the item appears.

6. Verify that the list of components includes materials from the standard BOM and the component list rule.

See Also

PeopleSoft Product Configurator 8.8 PeopleBook, “Using Configuration Rule Actions,” Defining Production Rules

Associating an Item With a UOM

When you create an item in the Define Item component, you define a standard UOM (unit of measure) for the item. Depending upon the business needs, you may want to define additional units of measure for transactions involving this item. For example, if you order an item by the case but ship it in individual units, you will want two additional UOMs: a shipping UOM (each) and an ordering UOM (case).

When multiple UOMs apply to a given item, PeopleSoft maintains conversion rates to facilitate processing.

See Also

[Chapter 2, “Working With Items,” Using Item Quantity UOM, page 28](#)

Pages Used to Associate an Item with a UOM

Page Name	Object Name	Navigation	Usage
Units of Measure	INV_ITEM_UOM	Items, Define Items and Attributes, Units of Measure	Assign a UOM to an item. For each item-UOM combination that you define, specify quantity precision and rounding rules for use in system calculation.
UOM Weight/Volume	INV_ITEM_WTVOL	Click the UOM Weight/Volume link on the Units of Measure page.	Assign default packing codes and stocking and shipping physical measurements to an item-UOM combination.

Assigning a UOM to an Item

To define the available units of measure for an item, use the Units of Measure (INV_ITEM_UOM) component.

Access the Units of Measure page.

Units of Measure

SetID:	SHARE	Item ID:	10009
Mountain Bike Gloves, Mens			
Convert To			
Standard Unit of Measure: EA Each			
Convert From			
*Unit of Measure:	BOX	Box	
*Conversion Rate:	4.00000000		
*Quantity Precision:	Decimal		
<input type="checkbox"/> Default Stocking UOM			
Rounding Rule			
<input checked="" type="radio"/> Natural Round <input type="radio"/> Round Up			
<u>UOM WeightVolume</u>			

Unit of Measure Type

Unit of Measure Type	Find View All	First	1 of 3	Last
Ordering	<input type="button"/> <input type="button"/>			
Shipping	<input type="button"/> <input type="button"/>			
Stocking	<input type="button"/> <input type="button"/>			

Units of Measure page

Conversion Rate

Enter conversion rates that conform to the quantity precision rule for an item-UOM combination. For example, if an item's standard UOM is defined as a whole number, you cannot enter a conversion rate that contains a decimal value.

Quantity Precision

The rule that is to be used for this item-UOM combination.

Note. Because serial-controlled items are by definition whole numbers, they can have only whole number quantity precision.

Default Stocking UOM
(default stocking unit of measure)

If the item is serial controlled, the default stocking UOM is defined as the standard UOM, and it cannot be overridden. The default stocking UOM is used as a default on the PO Receiving, Inspection, Express Putaway, Manual Staging, and RMA & InterUnit Receiving pages.

Unit of Measure Type

Indicate which transactions use the selected unit of measure (UOM). You must select at least one of these UOM types for each item:

Ordering: The unit of measure is used for stock requests. The ordering UOM is also used by PeopleSoft Order Management.

Shipping: The unit of measure is used for express issue and shipping/issues transactions.

Stocking: The unit of measure is used for any putaway or receiving transaction. This UOM can also be used for numerous other transactions, including transfers, container management, adjustments, picking, and physical accounting.

See Also

[Chapter 2, “Working With Items,” Using Item Quantity UOM, page 28](#)

[Chapter 2, “Working With Items,” Establishing Quantity Precision and Rounding Rules for Items, page 35](#)

Copying Items

To maximize consistency and efficiency in the item definition process, PeopleSoft Inventory enables you to copy item definitions from the setID level to the business unit level and between business units by using the Item Copy page. You can also copy the item status from the setID to any of the business units where you define the item, or you can copy the substitution definition to the business unit level.

This section discusses how to:

- Copy item information.
- Copy setID item status to a business unit.

Pages Used to Copy Item Information

Page Name	Object Name	Navigation	Usage
Item Copy	ITEM_COPY_INV	Items, Define Items and Attributes, Copy Item, Item Copy	Copy items within the same setID, copy item attributes within the same business unit, and copy item attributes between business units.
Copy SetID to BU Item Status	INV_ITM_STATUS_SP	Click the Copy Item Status link on the Define Item - General: Common page.	Copy the item status that you modify for the setID to any of the business units where the item is defined.
Copy SetID to BU Substitute Items	INV_SETID_BU_SP	Click the Copy to Business Unit link on the Define Item - Substitutes page.	Copy the substitution definition of an item at the setID level to the business unit level.

Copying Item Information

Access the Item Copy page.

Item Copy page

Copy Item Within SetID

If you select this option, you can also copy the purchasing and inventory business unit attributes that are established for the item by selecting the Copy Business Unit Attributes option.

Copy Business Unit Attributes

The Inventory Business Units and the Purchasing Business Units group boxes at the bottom of the page display the business units that have established the item ID. By default, all business units are selected. Clear those business units with attributes that you don't want to copy to the target item. When copying from inventory business units, planning attributes at the business unit level are copied along with weight and volume attributes and configuration attributes. Values that are calculated through the replenishment process are not copied. However, other replenishment attributes (set up attributes, for example) are copied.

Note. If you copy items between business units with different currencies, you must change all cost and price fields for the item manually.

Source Item ID

If the item being copied still has a status of *Under Initialization*, then the target item is also placed in *Under Initialization* status. If the item being copied has a status of *Approved*, *Hold*, *Discontinue*, or *Inactive*, and item approval is not required, then the item is placed in *Active* status. If item approval is required, the item is placed in *Under Initialization* status.

Copying SetID Item Status to a Business Unit

All business units where the item is defined appear. For each business unit, the system also displays the current status date, current item status, future status date, and future item status.

To copy the item status definition from the setID to a business unit, select the business unit's row, and then click OK. The setID's item status definition replaces the item status definition at the business unit level.

Substituting Items

A substitution definition for an item must first be established for a setID on the Define Item - Substitutes page before it can be modified for the business unit on the Define Business Unit Item - Substitutes page. You cannot add substitute items to substitution definitions at the business unit level unless they are defined for the setID. At the business unit level, you can only remove substitute items from the substitution definition or modify their attributes.

Substitute items must be unique for the item. You can't enter the same item twice with different dates. For example, Substitute A with effective dates from January 1, 1999 to February 1, 1999 and Substitute A with effective dates from February 1, 2000 to August 30, 2000 cannot be substitutes for the same item. In this case, you need to define a different substitute for the second set of effective dates.

If you use PeopleSoft Manufacturing, you must maintain substitute item data at the business unit level and at the BOM level for all component items where substitutions are allowed. You can also use substitute items in conjunction with discontinued items. As you phase out one item and drive its current quantity on hand to 0, you can define its replacement component as a substitute. In this way, when there is no quantity on hand to meet demand of the phase-out item, the substitute is recommended instead. A substitute item cannot be a phantom or a component of a phantom. In addition, where substitutes exist, the item cannot be changed to a phantom.

This section discusses how to:

- Establish a substitution definition for an item.
- Copy an item's substitution definition.

Pages Used to Define Item Substitutions

Page Name	Object Name	Navigation	Usage
Define Item - Substitutes	INV_ITEMS_DEFIN7	Items, Review Item Information, Items, Substitutes Items, Define Items and Attributes, Define Item, Substitutes	Establish a substitution definition for an item. An item substitution definition specifies alternate items that may be used in PeopleSoft Inventory, Purchasing, or Manufacturing when sufficient quantity of the requested item is unavailable.
Copy SetID to BU Substitute Items	INV_SETID_BU_SP	Click the Copy to Business Unit link on the Define Item - Substitutes page.	Copy the substitution definition of an item at the setID level to the business unit level.
Business Unit Substitute Items	INV_SUB_ATTRIB_SEC	Click the View Current button on the Copy SetID to BU Substitute Items page.	View the business unit's current substitution definition for an item before copying the item's substitution definition from the setID.
Define Business Unit Item - Substitutes	SUBS_ATTRIB_INV	Items, Define Items and Attributes, Define Business Unit Item, Substitutes	Modify the substitution definition that is established for the item at the setID level to meet the requirements of the business unit.
Copy Set ID Substitute Items	INV_SUB_ITEM_SEC	Click the Copy SetID Substitutes link on the Define Business Unit Item - Substitutes page.	View and copy (if available) the substitution definition for the item at the setID level.

Establishing a Substitution Definition for an Item

Access the Define Item - Substitutes page

*Priority	*Sub Item	Description	Start Date	*End Date	Conversion Rate	St
1	GR8001	Gear, Campani	01/01/2000	12/31/2099	1.00000000	EA

Define Item – Substitutes page

Substitute Item

Priority

The substitute item with the highest priority (the lowest number) is substituted first. Priority doesn't need to be sequential, though it must be greater than zero. PeopleSoft applications display, print, and suggest substitute options in priority order.

Start Date, End Date

Determines the date range for substitution validity. The current date appears by default as the start date, and December 31, 2099, appears as the default end date. You can change both dates.

Conversion Rate

Indicates the quantity of the substitute item that is required to replace the original item. The default value is 1, but you can modify the value as necessary. Conversion rates are calculated by using the standard UOM.

Copy to Business Unit

After you finish defining substitution options for the item, click this link to access the Copy SetID to BU Substitute Items page, where you can copy the setID's substitution definition to selected business units.

Usage

Use for Shipments

Indicates whether the substitute item is valid for material stock requests and sales orders during the picking process.

Use for Manufacturing

Indicates whether the substitute item can be used for substitutions on BOMs or production picking plans.

Use for Procurement

Indicates whether the substitute item can be used during online sourcing in PeopleSoft Purchasing.

Note. PeopleSoft Purchasing uses the substitution definition from only the setID level.

See Also

PeopleSoft Manufacturing 8.8 PeopleBook, “Understanding PeopleSoft Manufacturing,” Item Substitution

Copying an Item’s Substitution Definition

To copy the substitution definition for the item from the setID to a business unit, select the business unit’s row, and then click OK. If a substitution definition for the item exists for the business unit, the system replaces it with the setID’s substitution definition for the item.

Assigning Serial Numbers Automatically

To assign serial numbers automatically, use the Automatic Serial Numbers component. Use the AUTO_SERIAL_NUM_CI component interface to load data into the tables for this component.

When you assign serial numbers to items on a regular basis, you can streamline the data-entry process by establishing default automatic numbering rules. If the installation includes PeopleSoft Purchasing or PeopleSoft Manufacturing, you can use this default information to assign serial numbers for items that are received in inventory or for completed assemblies that are being moved to another production area.

Page Used to Assign Serial Numbers

Page Name	Object Name	Navigation	Usage
Automatic Serial Numbers	AUTO_SERIAL_NUM	Items, Define Items and Attributes, Automatic Serial Numbers	Define criteria for generating automatically created serial numbers.

Automatic Serial Numbers Page

Access the Automatic Serial Numbers page.

Unit:	US008	
Item ID:	SR1001	Omega 500 Touring Bike
*Serial Number Prefix:	<input type="text"/>	
Serial Number Length:	<input type="text" value="1"/>	
Multiplier:	<input type="text" value="1"/>	
Last Serial Number:	<input type="text"/>	<input checked="" type="checkbox"/> Zero Pad

Automatic Serial Numbers page

Note. If you don't define defaults by using this page, you have the option of entering the information manually while receiving items or recording assembly completions.

Last Serial Number	If you are generating shipping serial labels, the value is updated by inventory. If you use PeopleSoft Manufacturing, the Completions process does not update this field.
Zero Pad	Select this option if you want to use zeroes as placeholders for the serial number length that you define.

See Also

PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, “Designing an Electronic Data Collection System”

PeopleSoft Manufacturing 8.8 PeopleBook, “Completing Operations and Recording Scrap,” Generating Serial Numbers

CHAPTER 5

Loading Items

This chapter provides overviews of item loading, staged item maintenance, item price list and item master enterprise integration points (EIPs), and Item Loader data flow, and discusses how to:

- Set up the item price list EIP.
- Load items and prices using the item price list EIP.
- Set up the item master EIP.
- Load staged item data using the item master EIP.
- Publish outbound messages with the Item Loader process.
- Edit data errors in the Item Loader staging tables.
- Use the excel to component interface utility.

Understanding Item Loading

There are several ways to update PeopleSoft's master data tables with inbound item master data. These data loads enable you to update or add items, change pricing, update potential vendors for each item, and change item attributes. Adding or updating item data can be accomplished by using these options:

- The enterprise integration points (EIP's) of Item Price List and Item Master EIP's.
- An Excel spreadsheet with the PeopleTools component interface.
- MarketPlace item updates using the MarketSite CUP file.
- PeopleSoft eProcurement's xCBL interface.
- Cohera product loads.
- GPO contract interface.

Each option enables you to load data into staging tables before loading the item data into master data tables. While the data is in the staging tables, validation and error correction can be completed. Workflow can be used to notify you when items do not load into the item master data tables. Data loads can be viewed and corrected by using the Data Definition Maintenance component.

Once the items have been loaded into the master data tables, you can change several items at the same time by using the Catalog Maintenance Extract process. This process enables you to download items from master data tables to the item loader staging tables where you can alter the items using the Catalog Maintenance Update or the Data Definition Maintenance components.

Note. This chapter does not discuss the Cohera product load, CPO contract interface, or the catalog maintenance extract.

See Also

[Chapter 6, “Using Item Catalog Maintenance,” page 143](#)

PeopleSoft eProcurement 8.8 PeopleBook, “Using PeopleSoft eProcurement with a Marketplace”

PeopleSoft eProcurement 8.8 PeopleBook, “Setting Up and Maintaining Supplier Data”

PeopleSoft eProcurement 8.8 PeopleBook, “Setting Up and Maintaining Supplier Data,”

Loading Catalogs into PeopleSoft eProcurement

Understanding Staged Item Maintenance

PeopleSoft provides item catalog data import and maintenance tools. The Item Loader feature enables you to load item catalog data into staging tables, where you can manipulate item information by using the Item Template and Item Update components before importing the data into the master data tables.

The Item Loader feature supports two business processes for updating the master data tables with item data that is staged by third-party applications:

- Import item price data that is received from vendors.
- Import item data to synchronize item records with those on a third-party system.

For both business processes, the Item Loader process (IN_ITMLOAD) validates item data in staging tables and updates the master data tables with the valid records. Records with invalid data remain in the staging tables and can be corrected online, using the item Data Definition Maintenance component.

Note. After an item has been placed in the item staging tables, any changes that you make to the item by using the standard pages are overridden when the item is reloaded.

See Also

[Chapter 6, “Using Item Catalog Maintenance,” Understanding Item Catalog Maintenance, page 143](#)

Understanding Item Price List and Item Master Enterprise Integration Points

The Item Price List EIP enables you to receive item price data from third-party sources. The third-party source publishes the item price data using messaging or flat files to which you subscribe (that are based on Extensible Markup Language [XML]) and loads that data to the item staging tables. A third-party system can publish the ITEM_PRICELIST_LOAD message to the ITEM_CATALOG_PRICE channel.

If the price sent by the vendor is for the same unit of measure, currency code, and date as the one that exists in the system, the price will be updated. If any of these attributes are different, the price will be inserted as a new effective-dated row. In the event that the vendor does not provide the date, the Item_PriceList_Load message will use the system date.

The Item_PriceList_Load is specific to loading vendor items. You cannot create an item without providing a vendor using this feature.

The Item Master EIP enables you to receive item master data from third-party sources. The third-party publishes item sync data by using XML-based messages. A third-party system can publish the ITEM_SYNC, ITEM_SYNC_EFF, ITEM_FULLSYNC, or ITEM_FULLSYNC_EFF message to the ITEM_MAINTENANCE channel.

Item records that are received through the item master EIP messages are staged directly in the item loader staging tables. No intermediate staging or processing is required. Additionally, you can specify whether the item loader process should be launched automatically or manually as part of the item master EIP subscription parameters.

To set up the Item Loader process to start automatically as a part of the item master EIP subscription:

1. Access the Data Maintenance Setup component.
2. Select a transaction type of *Item*.
3. Access the Data Maint Utility Setup (data maintenance utility setup) page.
4. Select the Flag 1 option to automatically start the Item Loader process for the item records in each item master message that is received.

If the Flag 1 option is not selected, the new item records are inserted in the Item Loader staging tables, and you must start the Item Loader process manually to update the master data tables.

See Also

[Chapter 5, “Loading Items,” Loading Items and Prices Using the Item Price List EIP, page 126](#)

[Chapter 5, “Loading Items,” Understanding Item Loader Data Flow, page 123](#)

PeopleTools 8.44 PeopleBook: PeopleSoft Integration Broker

PeopleSoft Enterprise Components, “Understanding Enterprise Integration Points”

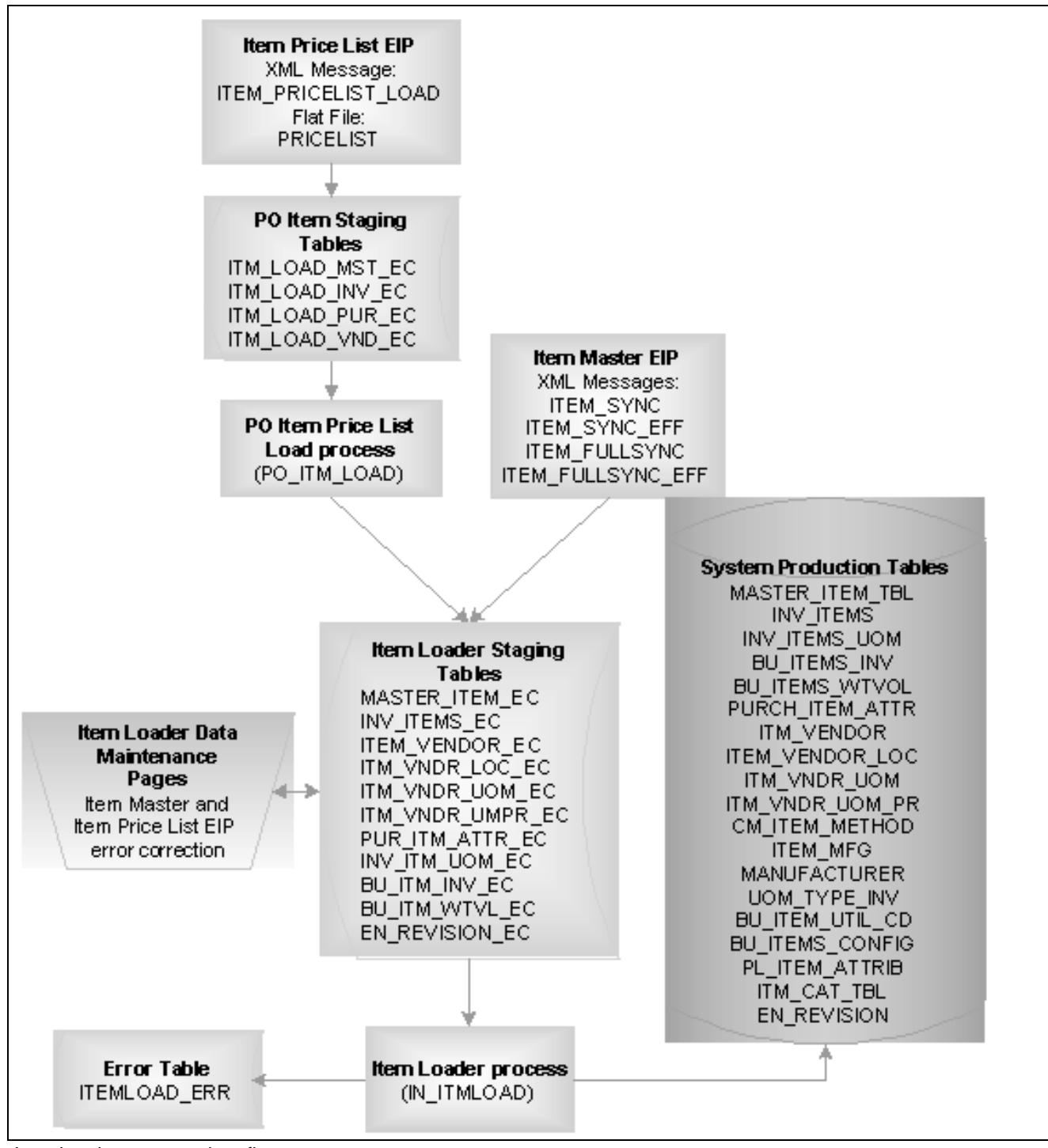
PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, “Managing PeopleSoft Supply Chain Management Integration Points”

http://www.peoplesoft.com/corp/en/products/technology/oif/eip_catalog.jsp

Understanding Item Loader Data Flow

This diagram shows the data flow of the Item Loader process. The Item Price List and Item Master EIPs provide the mechanisms for populating the Item Loader staging tables.

The Item Loader process acts on the item loader staging tables to load item data to the PeopleSoft master data tables.



See Also

[Chapter 5, “Loading Items,” Running the Item Price List Load Application Engine Process, page 127](#)

[Chapter 5, “Loading Items,” Running the Item Loader Process, page 128](#)

[Chapter 5, “Loading Items,” Editing Data Errors in the Item Loader Staging Tables, page 133](#)

http://www.peoplesoft.com/corp/en/products/technology/oif/eip_catalog.jsp

Setting up the Item Price List EIP

PeopleSoft delivers application messages with a default status of *Inactive*. You must activate each application message before attempting to publish messages or subscribe to messages. To set up an EIP message:

- Activate the message.
- Update the message channel.
- Define the gateway.
- Define the node.

To activate the message:

1. Select PeopleTools, Application Designer.
2. Select File, Open.
3. Select the Object Type of Message, enter the message name in the Name field, and click the Open button.
4. After the message opens, select File, Definition Properties.
5. Select the Use tab.
6. Select the Active check box to activate the message.
7. Click the OK button, then select File, Save to save the message.
8. Right click the Message Subscription PeopleCode, ItemPriceListLoad, and select Message Subscription Properties.
9. Select the Use tab.
10. Select the Active check box to activate the message subscription.
11. Click the OK button, then select File, Save to save the message.

To update the message channel:

1. Select PeopleTools, Application Designer.
2. Select File, Open.
3. Select the Object Type of Message Channel, and enter the message channel name in the Name field.
4. Click Open.
5. Verify that the message definition is found in the list of messages.

6. Select the Message Channel Properties, and select the Run for the Message Channel Status. The channel used is Item_Catalog_Price. You can also use the Application Message Monitor to view or change the status of the message channel.
7. Select File, Save to save the message channel file.

To define the gateway:

1. Select PeopleTools, Integration Broker, Gateways.
2. Enter the Gateway URL and load the Connectors.
3. Click the Save button.

To define the node:

1. Select PeopleTools, Integration Broker, Node Definitions.
2. Add the new node definition.
3. On the Node Info page, select the Active Note check box.
4. Select the Connectors tab and enter the Gateway ID and Connector ID.
5. Click the Save button.
6. Select the Transactions tab.
7. Add an active inbound async transaction for the message.
8. Save the transaction.

Loading Items and Prices Using the Item Price List EIP

This section discusses how to load item price list data from a message or flat file to the item loader staging tables by using the Item Price List Load process. The new item records are inserted in the Item Loader staging tables with a *Hold* status.

To load item price list data by using the Item Price List EIP:

1. Process the Item_PriceList_Load message or flat file.
2. Run the Item Price List Load application engine process (PO_ITMLOAD).
3. Run the Item Loader process (IN_ITMLOAD).
4. Review errors.

See Also

[Chapter 5, “Loading Items.” Editing Data Errors in the Item Loader Staging Tables, page 133](#)

Pages Used to Load Item Price List Data to the Item Loader Staging Tables

Page Name	Object Name	Navigation	Usage
Inbound File Publish	EO_FILETOMSG	Enterprise Components, Integration Definitions, Initiate Process, Inbound File Publish	Processes a flat file to load the item data into the item price list load staging tables.
Item Price List	RUN_PO_ITMLOAD	Data Exchanges, Process Transactions, Items, Item Price List Batch Load, Item Price List	Specify the parameters for the PO Item Price List Load (purchase order item price list load) process.

Processing the Item_PriceList_Load Message or Flat File

Messages are processed automatically. Flat files must be loaded using the Inbound File Publish page. Item data is placed into the item price list load staging tables (ITM_LOAD_MST_EC, ITM_LOAD_INV_EC, ITM_LOAD_PUR_EC, and ITM_LOAD_VND_EC).

Running the Item Price List Load Application Engine Process

Use the Item Price List Load process (PO_ITMLOAD) to add system default values to the item definitions and move the items from the item price list load staging tables to the item loader staging tables. The new item records are inserted in the item loader staging tables with a status of *New*.

Access the Item Price List page.

Stage Loader Parameters

All SetID	Select to load item records with any setID attribute. If you do not select this check box, enter a value in the SetID field to restrict the loading process to a specific setID.
All Vendors	Select to load item records with any vendor attributes. If you do not select this check box, enter values in the Vendor Set ID and Vendor ID fields to restrict the loading process to a specific vendor set ID or vendor.
All Manufacturers	Select to load items with any manufacturer attribute. If you do not select this check box, enter a value in the Manufacturer ID field to restrict the loading process to a specific manufacturer ID.

Note. If the system does not find the manufacturer attributes that are associated with imported item data in the MANUFACTURER table, it creates a new manufacturer.

Other options

Purchasing Dflts From Category (purchasing defaults from category)	Select to use the item category defaults that you established in the Item Categories component when creating the Purchasing Item Attributes segment of the item.
---	--

Delete Loaded Items	Select to delete item records from the item price list load staging tables as they are copied to the item loader staging tables. This enables you to work with smaller batches of item information by running the Item Price List Load process several times against the same item price list load staging tables until all records in the tables have been exhausted. To keep the data in the staging tables for audit purposes, do not select this check box.
Auto Assign ID (automatically assign ID)	Select the method by which the process assigns item IDs: <i>For All New Items</i> or <i>When Item ID is not specified</i> .
Default Item Setid	Select the setID that you want assigned to the loaded items, if the item setID has not already been provided.
Default Vendor Setid	Select the setID that you want assigned to the loaded items, if the item vendor setID has not already been provided.

See Also

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

Running the Item Loader Process

Run the item loader process (IN_ITMLOAD) to validate and transfer the item data into the PeopleSoft master data tables.

See Also

Chapter 5, “Loading Items,” Loading Staged Item Data Using the Item Master EIP, page 130

Reviewing Errors

Use the Data Definition Maintenance page to review any errors that did not pass the validation portion of the Item Loader process.

See Also

Chapter 5, “Loading Items,” Editing Data Errors in the Item Loader Staging Tables, page 133

Setting up the Item Master EIP

PeopleSoft delivers application messages with a default status of *Inactive*. You must activate each application message before attempting to publish messages or subscribe to messages. To set up item master EIP's:

- Activate the message.
- Update the message channel.
- Define the gateway.
- Define the node.

To activate the message:

1. Select PeopleTools, Application Designer.
2. Select File, Open.
3. Select the Object Type of Message, enter the message name in the Name field, and click the Open button.
4. After the message opens, select File, Definition Properties.
5. Select the Use tab.
6. Select the Active check box to activate the message.
7. Click the OK button, then select File, Save to save the message.
8. Right click the Message Subscription PeopleCode, and select Message Subscription Properties.
9. Select the Use tab.
10. Select the Active check box to activate the message subscription.
11. Click the OK button, then select File, Save to save the message.

To update the message channel:

1. Select PeopleTools, Application Designer.
2. Select File, Open.
3. Select the Object Type of Message Channel, and enter the message channel name in the Name field.
4. Click Open.
5. Verify that the message definition is found in the list of messages.
6. Select the Message Channel Properties, and select the Run for the Message Channel Status. The channel used is Item_Maintenance. You can also use the Application Message Monitor to view or change the status of the message channel.
7. Select File, Save to save the message channel file.

To define the gateway:

1. Select PeopleTools, Integration Broker, Gateways.
2. Enter the Gateway URL and load the connector.
3. Click the Save button.

To define the node:

1. Select PeopleTools, Integration Broker, Node Definition.
2. Add a new node definition.
3. On the Node Info page, select the Active Node check box.
4. Select the Connectors tab, and enter the Gateway ID and Connector ID.
5. Click the Save button.
6. Select the Transactions tab.
7. Add an active inbound async transaction for the message.

8. Save the transaction.

Loading Staged Item Data Using the Item Master EIP

This section discusses how to load item data from the item loader staging tables to the master data tables by using the Item Loader process.

To load item master data by using the item master EIP:

1. Process the item message.

A third-party system can publish these messages:

- ITEM_SYNC
- ITEM_FULLSYNC

2. Run the Item Loader process (IN_ITMLOAD).

3. Review errors.

See Also

[Chapter 5, “Loading Items,” Editing Data Errors in the Item Loader Staging Tables, page 133](#)

Page Used to Load Staged Item Data to the Master Data Tables

Page Name	Object Name	Navigation	Usage
Item Loader	RUN_IN_ITMLOAD	Data Exchanges, Process Transactions, Items, Item Loader	Run the Item Loader process to update the PeopleSoft master data tables with the item data in the Item Loader staging tables.

Running the Item Loader Process

Access the Item Loader page.

Using the parameters that are defined on the Item Loader page, the Item Loader process:

- Validates the item records in the item loader staging tables.
- Logs any errors that it finds.
- Updates the master data tables with the valid item data.

Records with invalid data remain in the item loader staging tables with an *Error* status. You can edit them online by using the Data Definition Maintenance pages.

After correcting the data errors, you can rerun the Item Loader process to populate the master data tables with the corrected item records.

Note. If you anticipate receiving large numbers of item records, manually schedule the Item Loader process to avoid peak processing times.

Warning! Use extreme care when updating the master data tables, especially when modifying existing item data. The Item Loader process cannot be reversed.

Item Loader Parameters

Item Load Type

Select the staging source of the records in the Item Loader staging tables that you want to load to the master data tables:

Item Export: Select to process item data that is extracted to the staging tables by the Catalog Maintenance Extract process.

Item Fullsync: Select to process item data that is staged with the Item Master EIP message ITEM_FULLSYNC.

Item Load From Excel: Select to process item data that is staged with the Excel interface.

Item MfgGPO: Select to process item data that is staged with the GPO Load message ITEM_MFG_GPO_LOAD.

Item Pricelist: Select to process item data that is staged with the Item Price List EIP message ITEM_PRICELIST_LOAD. Select this option to load item and price data from PeopleSoft eProcurement staging tables including CUP and xCBL files.

Item Sync: Select to process item data that is staged with the Item Master EIP message ITEM_SYNC.

All Item SetIDs

Select to load item records with any setID attribute. If you do not select this check box, enter a value in the SetID field to restrict the loading process to a specific setID. This field is not available when you select *Item Export* in the Item Load Typefield.

All EIP_CTL_IDs

Select to load item records with any EIP control ID attribute that is associated with the message that is specified in the Item Load Type field. If you do not select this check box, specify a range of EIP control IDs in the From and To fields.

All Message Instances

Select to load item records with any publication information that is associated with the message that is specified in the Item Load Type field. If you do not select this check box, then you should specify a publication node and ID.

Market Code

Select the type of market codes to use for the loaded items: *User Defined* or *UN/SPSC* (United Nations Standard Product and Services Codes). Use the Item Categories component to establish user-defined market codes.

Purge Cancelled Transactions

Select to purge item records that are marked for cancellation in the staging table. The records that are selected for purge must also meet the other criteria that you have set for the process.

Only Run Validation portion	Select to run only the data validation portion of the process. This feature enables you to check the data for errors before updating the master data tables. Correct any errors by using the Data Definition Maintenance pages.
Re-process any Errors in Range	Select to reprocess any item records in error that meet the criteria that you have set for the process.
Re-process any Hold in Range	Select to reprocess any item records with a <i>Hold</i> status that meet the criteria you have set for the process.
<hr/>	
Update Standard Price	Select to update standard prices when an item/vendor UOM (unit of measurement) price record is loaded. This field is available only if <i>Item Pricelist</i> is selected in the Item Load Type field. Future effective-dated prices will not go into effect until the Price Update process is run on or after the effective date.
Update Business Unit Price	Select to update business unit standard prices when an item/vendor UOM price record is loaded. This field is available only if <i>Item Pricelist</i> is selected in the Item Load Type field. If this is selected, the new price is applied to all business units that match the setID and item combination and that have the Business Unit Update Price check box selected on the BU Specific Attributes (business unit specific attributes) page. Future effective-dated prices won't go into effect until the Price Update process is run on or after the effective date.

See Also

[Chapter 5, “Loading Items,” Editing Data Errors in the Item Loader Staging Tables, page 133](#)

[Chapter 7, “Using Group Purchasing Organizations,” page 159](#)

[Chapter 6, “Using Item Catalog Maintenance,” Extracting Item Data, page 150](#)

PeopleSoft Purchasing 8.8 PeopleBook, “Defining Purchasing Item Information,”
Running the Price Update Process

http://www.peoplesoft.com/corp/en/products/technology/oif/eip_catalog.jsp

Publishing Outbound Messages with the Item Loader Process

In addition to updating the master data tables with inbound item master data, you can set the Item Loader process to publish a message by using the Item Master EIP as part of each processing run. The message contains the item data that was used to update the PeopleSoft master data tables. Third-party applications that need to synchronize their table records with the PeopleSoft application records can subscribe to this message.

To publish an outbound message with the Item Loader process, use the Batch Publish Rules component to activate the IN_ITMLOAD batch publish rule ID for the ITEM_SYNC message.

See Also

PeopleSoft Enterprise Components, “Using the Effective Date Publish Utility”

Editing Data Errors in the Item Loader Staging Tables

View and modify the item data that is staged in the Item Loader staging tables by using the Data Definition Maintenance component. The Item Loader process flags any records with data errors that have an *Error* status. From the Data Definition Maintenance component, you can access the Item Loader Data Maintenance pages, correct any errors, and edit the staged item data.

After correcting the data errors, you can rerun the Item Loader process to populate the master data tables with the corrected item records.

See Also

PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, “Managing PeopleSoft Supply Chain Management Integration Points,” Using Data Definition Maintenance

Pages Used to Edit Item Data Errors in the Item Loader Staging Tables

Page Name	Object Name	Navigation	Usage
Data Definition Maintenance	IN_EIP_ITEM_MAINT	<p>Data Exchanges, Transaction Error Handling, Maintain Data Definitions</p> <p>Select the <i>ITEM</i> transaction type, and click the Search button.</p> <p>Click the Show Detail Entry button for the desired row to view the error.</p>	<p>View error details about staged Item Loader data. Access other pages where fields for specific segments of the Item Loader data can be edited.</p> <p>See <i>PeopleSoft Supply Chain Management Integration 8.8 PeopleBook</i>, “Managing PeopleSoft Supply Chain Management Integration Points,” Using Data Definition Maintenance.</p>
Data Definition Maintenance - Item Definition - General: Common	IN_EIPITM_DEF1	Click the Item Definition link on the Item Loader Data Maintenance page.	<p>Edit item definition fields in the setID-level segment of staged Item Loader data.</p> <p>See Chapter 4, “Defining Items,” Defining General Item Information, page 67.</p>

Page Name	Object Name	Navigation	Usage
Data Definition Maintenance - Item Definition - General: Classifications	IN_EIPITM_DEF4	Click the Classifications link on the Data Definition Maintenance - Item Definition - General: Common page.	Edit item definition fields in the setID-level segment of staged Item Loader data. See Chapter 4, “Defining Items,” Defining Additional Item Attributes, page 71.
Data Definition Maintenance - Item Definition - General: Dimensions	IN_EIPITM_DEF3	Click the Dimensions link on the Data Definition Maintenance - Item Definition - General: Common page.	Edit item definition fields in the setID-level segment of staged Item Loader data. See Chapter 4, “Defining Items,” Defining Item Dimensions, page 71.
Data Definition Maintenance - Item Definition - General: Usage	IN_EIPITM_DEF8	Click the Usage link on the Data Definition Maintenance - Item Definition - General: Common page.	Edit item definition fields in the setID-level segment of staged Item Loader data. See Chapter 4, “Defining Items,” Defining Material Usage Attributes, page 72.
Data Definition Maintenance - Item Definition - General: Related Language	PV_EIPITM_DEF1	Select the Related Language tab on the Data Definition Maintenance - Item Definition - General: Common page.	Edit item definition fields in the setID-level segment of staged Item Loader data. See Chapter 4, “Defining Items,” Defining Material Usage Attributes, page 72.
Data Definition Maintenance - Item Definition - Inventory: Tracking/Description	IN_EIPITM_DEF2	Select the Inventory tab on the Data Definition Maintenance - Item Definition - General: Common page.	Edit item definition fields in the setID-level segment of staged Item Loader data. See Chapter 4, “Defining Items,” Establishing Item Tracking and Lot-Control Attributes, page 73.
Data Definition Maintenance - Item Definition - Inventory: Shipping/Handling	IN_EIPITM_DEF5	Click the Shipping/Handling link on the Data Definition Maintenance - Item Definition - Inventory: Tracking/Description page	Edit item definition fields in the setID-level segment of staged Item Loader data. See Chapter 4, “Defining Items,” Establishing Item Shipping and Handling Attributes, page 76.
Data Definition Maintenance - Item Definition - Inventory: Related Language	PV_EIPITM_DEF2	Select the Related Language tab on the Data Definition Maintenance - Item Definition - Inventory page.	Edit item definition fields in the setID-level segment of staged Item Loader data. See Chapter 4, “Defining Items,” Defining Material Usage Attributes, page 72.

Page Name	Object Name	Navigation	Usage
Data Definition Maintenance - Item UOM (item unit of measurement) - Item UOM	IN_EIPITEM_UOM	Click the Item UOM link on the Item Loader Data Maintenance page.	Edit item definition fields in the item UOM segment of staged Item Loader data. See Chapter 4, “Defining Items,” Assigning a UOM to an Item, page 111.
Data Definition Maintenance - Item UOM - Item UOM Weight Volume	IN_EIPITEM_UOM_WVL	Select the Item UOM Weight Volume tab on the Data Definition Maintenance - Item UOM page.	Edit item definition fields in the item UOM segment of staged Item Loader data.
Data Definition Maintenance - Item Revision - Item Revision	MG_EIPEN_REVISION	Click the Item Revision link on the Item Loader Data Maintenance page.	Edit item definition fields in the item revision segment of staged Item Loader data. See PeopleSoft Manufacturing 8.8 PeopleBook , “Maintaining Bills of Material,” Maintaining Revisions.
Data Definition Maintenance - Item Revision - Revision Text	MG_EIPEN_REV_TEXT	Select the Item Revision Text tab on the Data Definition Maintenance - Item Revision page.	Edit item definition fields in the item revision segment of staged Item Loader data. See PeopleSoft Manufacturing 8.8 PeopleBook , “Maintaining Bills of Material,” Maintaining Revisions.
Data Definition Maintenance - Manufacturers	IN_EIP_ITEM_MFG	Select the Manufacturers link on the Data Definition Maintenance page.	Edit item definition fields in the item manufacturer segment of staged Item Loader data.
Data Definition Maintenance - BU Attributes (business unit attributes) - General: Common	IN_EIPBU_GEN_ATTR	Click the BU Attributes link on the Item Loader Data Maintenance page.	Edit item definition fields in the business unit item definition segment of staged Item Loader data. See Chapter 4, “Defining Items,” Defining Basic Business Unit Item Attributes, page 84.
Data Definition Maintenance - BU Attributes - General: Usage	IN_EIPBU_MATRL_USG	Click the Usage link on the Data Definition Maintenance - Item Definition - General: Common page.	Edit item definition fields in the business unit item definition segment of staged Item Loader data.
Data Definition Maintenance - BU Attributes - General: Export Information	IN_EIPBU_GATTR_EXP	Click the Export Information link on the Data Definition Maintenance - Item Definition - General: Common page.	Edit item definition fields in the business unit item definition segment of staged Item Loader data. See Chapter 4, “Defining Items,” Defining Item Export Information, page 87.

Page Name	Object Name	Navigation	Usage
Data Definition Maintenance - BU Attributes - Inventory: Shipping/Handling	IN_EIPBU_OVRD_ATTR	Select the Inventory tab on the Data Definition Maintenance - Item Definition - General: Common page.	Edit item definition fields in the business unit item definition segment of staged Item Loader data. See Chapter 4, “Defining Items,” Defining Shipping and Handling Item Attributes, page 88.
Data Definition Maintenance - BU Attributes - Inventory: Replenishment	IN_EIPBU_RPLN_ATTR	Click the Replenishment link on the Data Definition Maintenance - BU Attributes - Inventory: Shipping/Handling page.	Edit item definition fields in the business unit item definition segment of staged Item Loader data. See Chapter 4, “Defining Items,” Defining Item Replenishment Attributes, page 90.
Data Definition Maintenance - BU Attributes - Inventory: Weight/Volume	IN_EIPBU_WTVL_ATTR	Click the Weight/Volume link on the Data Definition Maintenance - BU Attributes - Inventory: Shipping/Handling page.	Edit item definition fields in the business unit item definition segment of staged Item Loader data. See Chapter 4, “Defining Items,” Defining Item Weight and Volume Information, page 92.
Data Definition Maintenance - BU Attributes - Manufacturing: General	IN_EIPBU_MFG_ATTR	Select the Manufacturing tab on the Data Definition Maintenance - Item Definition - General: Common page.	Edit item definition fields in the business unit item definition segment of staged Item Loader data. See Chapter 4, “Defining Items,” Defining Manufacturing Information for an Item, page 94.
Data Definition Maintenance - BU Attributes - Manufacturing: WIP Replenishment	IN_EIPBU_MFG_ATTR2	Click the WIP Replenishment link on the Data Definition Maintenance - BU Attributes - Manufacturing: General page.	Edit item definition fields in the business unit item definition segment of staged Item Loader data. See Chapter 4, “Defining Items,” Defining Item Replenishment Attributes, page 90.
Data Definition Maintenance - PO Attributes - Purchasing Attributes	PO_EIPITM_TBL_PUR	Click the PO Attributes link on the Item Loader Data Maintenance page.	Edit item definition fields in the item purchasing attributes segment of staged Item Loader data. See PeopleSoft Purchasing 8.8 PeopleBook, “Defining Purchasing Item Information,” Defining Purchasing Item Attributes.

Page Name	Object Name	Navigation	Usage
Data Definition Maintenance - PO Attributes - Purchasing Controls	PO_EIPITM_TBL_PUR2	Select the Purchasing Controls tab on the Data Definition Maintenance - PO Attributes – Purchasing Attributes page.	Edit item definition fields in the item purchasing attributes segment of staged Item Loader data. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Defining Purchasing Item Information,” Defining Purchasing Controls.
Data Definition Maintenance - PO Attributes - Purchasing Controls 2	PO_EIPITM_TBL_PUR3	Select the Purchasing Controls 2 tab on the Data Definition Maintenance - PO Attributes - Purchasing Attributes page.	Edit item definition fields in the item purchasing attributes segment of staged Item Loader data. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Defining Purchasing Item Information,” Defining Purchasing Controls.
Data Definition Maintenance - PO Attributes - Related Language	PV_EIPITM_DEF4	Select the Related Language tab on the Data Definition Maintenance - PO Attributes - Purchasing Attributes page.	Edit item definition fields in the item purchasing attributes segment of staged Item Loader data. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Defining Purchasing Item Information,” Defining Purchasing Item Attributes.
Data Definition Maintenance - Categories	PV_EIPITEM_CAT	Click the Categories link on the Item Loader Data Maintenance page.	Edit item definition fields in the item category segment of staged Item Loader data. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Defining Purchasing Item Information,” Defining Purchasing Item Categories.
Data Definition Maintenance - Item Vendor - Item Vendors	PO_EIPITEM_VENDOR1	Click the Item Vendor link on the Item Loader Data Maintenance page.	Edit item definition fields in the item vendor segment of staged Item Loader data. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Defining Purchasing Item Information,” Defining Purchasing Item Vendor Relationship Attributes and Priorities.

Page Name	Object Name	Navigation	Usage
Data Definition Maintenance - Item Vendor - Locations	PO_EIPITEM_VENDOR2	Select the Locations tab on the Data Definition Maintenance - Item Vendor - Item Vendors page.	Edit item definition fields in the item vendor segment of staged Item Loader data. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Defining Purchasing Item Information,” Defining Purchasing Item Vendor Relationship Attributes and Priorities.
Data Definition Maintenance - Item Vendor - UOM	PO_EIPITM_VND_UOM1	Select the UOM tab on the Data Definition Maintenance - Item Vendor - Item Vendors page.	Edit item definition fields in the item vendor segment of staged Item Loader data. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Defining Purchasing Item Information,” Defining Purchasing Item Vendor Unit of Measure and Pricing Information.
Data Definition Maintenance - Item Vendor - UOM Price	PO_EIPITM_VND_UOM2	Select the UOM Price tab on the Data Definition Maintenance - Item Vendor - Item Vendors page.	Edit item definition fields in the item vendor segment of staged Item Loader data. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Defining Purchasing Item Information,” Defining Purchasing Item Vendor Unit of Measure and Pricing Information.
Data Definition Maintenance - Item Mfg GPO Errors	IN_EIPITM_MFG_GPO	Click the Item Mfg GPO link on the Item Loader Data Maintenance page.	Edit item definition fields in the item manufacturer GPO segment of staged Item Loader data.

Accessing Item Loader Data Error Details

Access the Data Definition Maintenance – Errors page.

If the staged item loader data contains errors, each field with an error appears in the Errors scroll area. The field name appears along with message text describing the problem and a record description. Click the Detail button to access the page where you can correct the error.

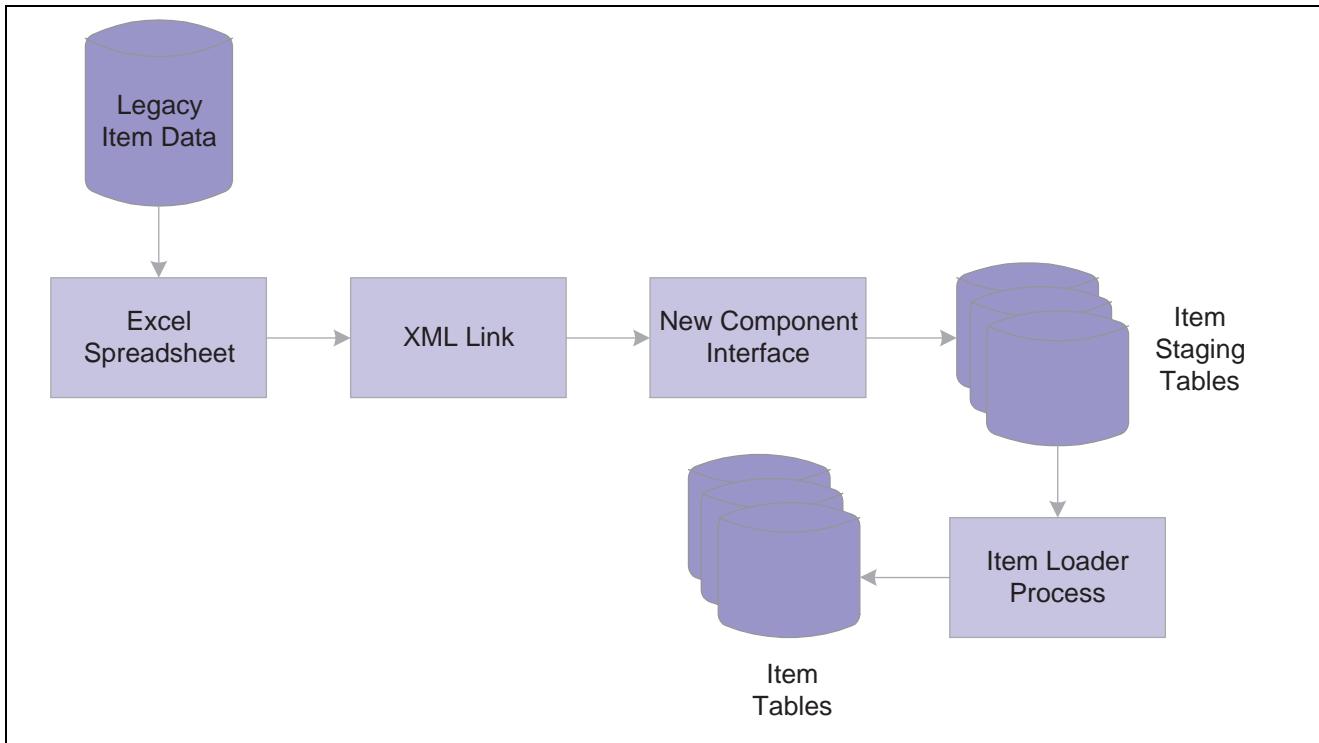
Click the links at the bottom of the page to access pages where you can modify the fields that are included in each segment of the message.

Note. If the Item Loader data for an item does not contain a specific segment, you cannot access the corresponding pages.

Using the Excel Component Interface Utility

Item data can be loaded into the item loader staging tables using a customized spreadsheet. This provides the ability to import data from a legacy system to a PeopleSoft system during the conversion process.

This diagram shows the process of loading item data from a spreadsheet:



Master Item Load Component Interface business process

This process is broken into five steps:

1. Creating the spreadsheet.
2. Using the XML link.
3. Running the component interface.
4. Reviewing the item staging tables.
5. Running the Item Loader process.

Creating the Spreadsheet

The spreadsheet allows you to create a template of the fields that you will enter and specify the component interface that will be used. The data in the spreadsheet is merged with any default values. A provided macro is then executed by using an XML link.

Purchasing item attributes are added to the master item spreadsheet not the item vendor spreadsheet. Purchasing item attributes must be defined for an item before adding the item vendor data.

Using the XML Link

The XML link is a generic link that is used to enable the spreadsheet macro to communicate with the PeopleSoft component interface by using the *Add* mode.

Running the Component Interface

There are two component interfaces that can be executed to load item data:

- The first component interface IN_MST_ITEM_XLS enables you to define new items.

If an item already exists on the master item table, the Item Loader process will reject this data. If an item ID is not provided, a new ID will be assigned. This component interface will use the ITEM_SYNC subscription function to insert data into the staging tables. The component interface only works with those fields that are handled by the message. The records that are exposed during this component interface are:

- MASTER_ITEM_CVW
- INV_ITM_CVW
- ITM_UOM_CVW
- BU_ITM_INV_CVW (BU_ITM_WTVL_CVW and EN_REVISION_CVW)
- PUR_ITM_ATR_CVW

- The second component interface IN_VND_ITEM_XLS enables you to define new vendor item data for existing items.

You can provide SetID and INV_ITEM_ID, or SetID and MFG_ID and MFG_ITEM_ID to identify the existing items. If master item or purchasing item data is not found, the records will be rejected by the component interface and will not be added to the staging tables. The records that are exposed during this component interface are:

- MASTER_ITEM_CVW
- ITM_VND_CVW
- ITM_VND_LOC_CVW
- ITM_VND_UOM_CVW
- ITM_VND_UMP_CVW

Both component interfaces cannot be used to make changes to existing item data that exists in master data tables. Changes should be performed by using the Data Definition Maintenance option.

The Item Loader process performs the majority of the editing for errors, therefore most errors will not be returned to the spreadsheet by the component interface. Editing for errors should be performed by using the Data Definition Maintenance option.

Note. You must load IN_MST_ITEM_XLS to add new item data, before IN_IND_ITEM_XLS if vendor item data is required.

Reviewing the Item Staging Tables

The component interface populates the staging tables.

Running the Item Loader Process

The Item Loader process picks up the data from the item staging tables, edits that data, and populates the item master data tables with the valid data. Editing for errors should be performed by using the Data Definition Maintenance option.

See Also

[Chapter 5, “Loading Items,” Running the Item Loader Process, page 130](#)

[Chapter 5, “Loading Items,” Editing Data Errors in the Item Loader Staging Tables, page 133](#)

PeopleTools 8.44 PeopleBook: PeopleSoft Component Interface PeopleBook

CHAPTER 6

Using Item Catalog Maintenance

This chapter provides an overview of item catalog maintenance and discusses how to:

- Create and use catalog maintenance templates.
- Extract item data.
- Update staged item data.

Understanding Item Catalog Maintenance

The Catalog Maintenance Template, Catalog Maintenance Extract, and Catalog Maintenance Update components enable you to efficiently update item data in the Item Loader staging tables in a secure and controlled environment.

The PeopleSoft Item Catalog Maintenance feature enables you to update item data for multiple items at one time. The item information is extracted from the item master tables into the item staging tables, where you can alter the data in a secure and controlled environment. You then use the Item Loader process to reload the data into the item master tables.

The Item Catalog Maintenance feature enables you to quickly change the data for large groups of items. This feature is especially useful for adding changes that affect numerous items. Examples include:

- Changing the item category for a large group of items.
- Increasing or decreasing the item prices by percentage.
- Correcting errors that are not found during an enterprise integration point (EIP) data load or MarketSite item load.

These are the steps to update data for items in PeopleSoft item master tables:

1. Create a template by using the Catalog Maintenance Template component:
 - a. Use the Record (Table) Name field on the Catalog Maintenance Template page to enter the records from the item staging tables that correspond to the item master tables that you want to change.
 - b. Select the Export Records check box to indicate that you want to use this template to export item data from the item master tables.
 - c. Click the View Export Records link to view the name of the item master tables containing data that will be downloaded into the item staging tables.
 - d. Click the Assign Roles link to access the Assign Roles page, where you select the roles with security rights to view and change item data by using this template.

- e. Click the linked record description on the Catalog Maintenance Template page to access the Select Fields page, where you can select the record fields that can be altered when using this template.
- f. Use the Catalog Maintenance Template - Secure Data page to restrict the rows of item data that are retrieved from the item master tables.

2. Use the Catalog Maintenance Extract component to:
 - a. (Optional) Further refine the item selection by using the Catalog Maintenance Extract - Global Criteria page.
 - b. (Optional) View the data that will be downloaded.

From the Catalog Maintenance Extract page, select the item master table to be viewed and then click the View Data button to access the Select Fields page. After you have selected the fields to view, the data in the fields appear. This is the data to be extracted from the item master tables.
 - c. Run the process that extracts the item data.

Click the Execute Request button to run the process.
3. Use the Catalog Maintenance Update component to:
 - a. (Optional) Narrow the selection of items to be updated by using the Catalog Maintenance Update - Global Criteria page.
 - b. Enter the changes to the item data by using the Catalog Maintenance Update page.
 - c. Run the process that updates the item staging tables with the changes.

Click the Execute Request button to run the process.
4. Use the Item Loader page to reload the items into the PeopleSoft item master tables.

Be sure to identify the template that is used and to select the *Item Export* item load type.

Note. After you have placed an item in the item staging tables, any changes to the item by using the standard pages may be overridden when the item is reloaded. A warning message appears when you access the downloaded items by using these PeopleSoft pages and components:

Define Item component.

Purchasing Attributes component.

Item Approval page.

Define Business Unit Item component.

Define Item component.

Define Item - Units of Measure page.

Item Approval Page.

Item Copy page.

Price Adjustments component.

Miscellaneous Charges page.

See Also

- [Chapter 6, “Using Item Catalog Maintenance,” Creating and Using Catalog Maintenance Templates, page 146](#)
- [Chapter 6, “Using Item Catalog Maintenance,” Extracting Item Data, page 150](#)
- [Chapter 6, “Using Item Catalog Maintenance,” Filtering Items Before Extraction, page 152](#)
- [Chapter 6, “Using Item Catalog Maintenance,” Securing Item Data, page 150](#)
- [Chapter 6, “Using Item Catalog Maintenance,” Updating Staged Item Data, page 153](#)
- [Chapter 5, “Loading Items,” Understanding Item Loader Data Flow, page 123](#)

Common Elements Used in This Chapter

Condition

This field is available for entry if you have two or more rows of criteria. Values are:

AND: Select if you want each of the selected criteria to be considered when narrowing the scope of the item data update. For example, suppose that you select account 212020 *and* alternate account 111000. The system updates only item data that has been assigned to account 212020 and alternate account 111000.

OR: Select if you want the scope of the item data update to be narrowed by using any one of the selection criteria that you have selected. For example, suppose that you select account 212020 *or* alternate account 111000. The system updates item data that has been assigned to either account 212020 or alternate account 111000.

Use a combination of *AND* and *OR* conditions to specify more complex selection criteria. For example, suppose that you select account 212020 *or* alternate account 111000 *and* primary buyer Atamian, Wes. The system updates item data that has been assigned to either account 212020 or alternate account 111000, and that has also been assigned to the primary buyer Atamian, Wes.

Field Name

The technical name of the field that is used as criteria. The fields that are available for selection depend on the record that is selected. The system provides any prompts that are associated with the field that you select.

Operator

Select to define the quantifier for the value that you enter in the Value field. Values are:

<=: Less than or equal to the criteria.

>=: Greater than or equal to the criteria.

Equal: Equal to the criteria.

Greater: Greater than the criteria.

Less: Less than the criteria.

Not Equal: Does not match the criteria.

Like: Enables the use of wild cards in the Value field. The target item data must contain the criteria that are defined here. Valid wild cards depend on the database system.

Not Like: Enables the use of wild cards in the Value field. The target item data must not contain the criteria that are defined here. Valid wild cards depend on the database system.

Value

The value in the field. The system narrows the update to item data based on this value, combined with the operator value and the field that is selected.



Click the View Values button to access the Select Valid Value page, where you can view and select values for the selected field.

Creating and Using Catalog Maintenance Templates

This section discusses how to:

- Create catalog maintenance templates.
- Select and view catalog maintenance update fields.
- Assign role users to templates.
- Secure item data.

Pages Used to Create and Use Catalog Maintenance Templates

Page Name	Object Name	Navigation	Usage
Catalog Maintenance Template	ITM_MASS_TMPLT	Data Exchanges, Setup, Catalog Maintenance Template	Create templates that serve as guides to the fields and records that can be updated by the assigned role users.
Select Fields	PO_MASS_FLD_SEL	<p>Click the linked record description on the Catalog Maintenance Template page.</p> <p>Click the linked record description on the Secure Data page.</p> <p>The link text depends on the value in the Record (Table) Name field. If you are in Add mode, the link text is Select Fields.</p> <p>This page cannot be accessed unless a value is selected in the Record (Table) Name field.</p>	<ul style="list-style-type: none"> When accessed from the Catalog Maintenance Template page, you can use the Select Fields page to specify the fields that a role that is assigned to the template can update. When accessed from the Catalog Maintenance Update page, you can use the Select Fields page to view the fields that you have chosen to update. When accessed from the Catalog Maintenance Update - Global Criteria page, you can use the Select Fields page to select the fields to include in the global criteria.
Catalog Maintenance Template - Secure Data	ITM_TMPLT_GBL_CRT	Data Exchanges, Setup, Catalog Maintenance Template, Secure Data	Enter criteria to restrict the item data that is available to be altered.
Assign Roles	ITM_TMPLT_OPR	Click the Assign Roles link on the Catalog Maintenance Template page.	Assign role users to the selected template.

Creating Catalog Maintenance Templates

Use the Catalog Maintenance Template component to create templates that define which records and fields can be extracted from the item master tables and updated. You assign role users to the templates to determine which users have authority to update the item data in the template. These templates serve as guides to which items can be updated and as security features.

Access the Catalog Maintenance Template page.

Catalog Maintenance Template | [Secure Data](#)

SetID: SHARE **Template ID:** MAINTSTAGE

***Descr:** Maintain Item Stage **Short Descr:** Update Stg

Export Records? **Update All Staged Data**

Select Record [Find](#) | [View All](#) First 1 of 11 Last

***Record (Table) Name:** [Operating Inventory Record](#)

Select Fields [Find](#) | [View 100](#) First 1-4 of 103 Last

*Field Name	Short Name		
ADD_HANDLING	Action		
AUDIT_ACTN	Avail Lead Time		
AVAIL_LEAD_TIME	BOM		
BOM_CODE			

[Assign Roles](#) [View Export Records](#)

Catalog Maintenance Template page

Select Record

Record (Table) Name

Enter the record that is accessible to the roles who are assigned to the selected template. This record determines which fields are available for selection in the Select Fields scroll area. The records that are available for selection are limited to those that are currently in the item loader staging tables.

<Record Description>

Click the linked record description of the selected record (table) name to access the Select Fields page, where you can specify the fields that a role that is assigned to the template can update.

Select Fields

Use the Select Fields scroll area to select the fields that you want to include in the template.

Export Records

Select to enable users of this template to extract item data from the item master tables into the item staging tables, where the items can be changed.

Update All Staged Data

Select to enable users of this template to update any data in the item staging tables without the template restrictions. Only high-level users should use this feature.

Assign Roles

Click to access the Assign Roles page, where you can assign role users to the selected template.

View Export Records

Click to view the item master tables that contain item data that will be extracted into the item staging tables. The tables that are displayed are based on the entries in the Record (Table) Name field.

Warning! Only power users should select the Update All Staged Data check box. This option enables you to update data that is not related to the template.

See Also

[Chapter 5, “Loading Items,” Loading Items and Prices Using the Item Price List EIP, page 126](#)

[Chapter 6, “Using Item Catalog Maintenance,” Understanding Item Catalog Maintenance, page 143](#)

[Chapter 6, “Using Item Catalog Maintenance,” Updating Staged Item Data, page 153](#)

Selecting and Viewing Catalog Maintenance Update Fields

Access the Select Fields page.

Select

When accessed from the Catalog Maintenance Template page, select to add the associated field to the item template. The fields that are available for selection are all of those that are not already assigned to the template. Select as many fields as necessary.

When accessed from the Catalog Maintenance Update - Global Criteria page, select to add the associated field to the global criteria.

When accessed from the Secure Data page, select to add the associated field to the data extraction criteria.

When you click OK, the values that you selected appear on the primary page from which you accessed this page.

When accessed from the Catalog Maintenance Update page, any fields that you have selected to update on the Catalog Maintenance Update page appear with their associated check boxes selected.

See Also

[Chapter 6, “Using Item Catalog Maintenance,” Updating Staged Item Data, page 153](#)

Assigning Role Users to Templates

Access the Assign Roles page.

Assign Roles

Role Name

The role assigned to the template. When using the Catalog Maintenance Update component, users are able to access only the templates to which their own roles have been assigned.

See Also

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[Chapter 6, “Using Item Catalog Maintenance,” Creating and Using Catalog Maintenance Templates, page 146](#)

Securing Item Data

Access the Catalog Maintenance Template - Secure Data page.

SetID:	SHARE	Template ID:	MAINTSTAGE
Descr:	Maintain Item Stage	Short Desc:	Update Stg

Select Record

Record (Table) Name:	MASTER_ITEM_EC	Find	View All	First	1 of 1	Last
Item Master Stage Table						

Enter Criteria

Condition	Field Name	Operator	Value
SETID	SETID	Equal	SHARE

Secure Data page

Use this page to restrict the data that is extracted from the item master tables that are listed on the Catalog Maintenance Template page. Specify the criteria that must be met before a row of data can be extracted from the item master tables into the item staging tables. Be sure to specify criteria to restrict the download to the current, active row of data.

Extracting Item Data

This section discusses how to:

- Extract the selected data.
- View data before extraction.
- Filter items before extraction.
- Select values to filter data.

After a template is defined, you can extract the data from the item master tables and store it in the item staging tables. Use the Catalog Maintenance Extract component to:

- (Optional) Narrow the item data selection.
- Extract item data to the staging tables.

Pages Used to Extract Item Data

Page Name	Object Name	Navigation	Usage
Catalog Maintenance Extract	PO_EXPORT_CRITERIA	Data Exchanges, Process Transactions, Items, Catalog Maintenance Extract	Select the item record to download and run the extract process to move data from the item master tables to the item staging tables.
Catalog Maintenance Extract - Global Criteria	PO_EXP_GLB_CRTRIA	Data Exchanges, Process Transactions, Items, Catalog Maintenance Extract, Global Criteria	Enter criteria to further restrict the item data that is available to be changed.
Select Valid Value	PO_MASS_VAL_SEL	 Click the View Value button on the Catalog Maintenance Extract - Global Criteria page.	View and select values for the associated field. This page is accessible only when the selected field name has associated value prompts.
Select Fields	PO_MASS_FLD_SEL	Click the View Data link on the Catalog Maintenance Extract page.	Select the fields for which you want to view data.
View Log	PO_EXPORT_LOG	Click the View Log link on the Catalog Maintenance Extract page.	View the meta SQL that is used to extract the data.

Extracting the Selected Data

Access the Catalog Maintenance Extract page.

Catalog Maintenance Extract
Global Criteria

User ID:	SAMPLE	Selection Criteria ID:	MAINEXTRCT																
SetID:	SHARE	Template ID:	MAINTSTAGE																
		Entered on:	12/17/2001																
<input type="checkbox"/> Delete Pending Stage Records																			
Records to Export		Customize Find View All  First  1-7 of 11  Last																	
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Record (Table) Name</th> <th>Record Description</th> </tr> </thead> <tbody> <tr><td><input checked="" type="checkbox"/> BU_ITEMS_INV</td><td>Operating Inventory Record</td></tr> <tr><td><input type="checkbox"/> BU_ITEMS_WTVOL</td><td>Item Weight/Volume by UOM</td></tr> <tr><td><input type="checkbox"/> EN_REVISION</td><td>Item/Revision Record</td></tr> <tr><td><input type="checkbox"/> INV_ITEM_UOM</td><td>Inv Unit of Measure Conversion</td></tr> <tr><td><input type="checkbox"/> INV_ITEMS</td><td>Inventory Item Master</td></tr> <tr><td><input type="checkbox"/> ITM_VENDOR</td><td>Vendor Item Table</td></tr> <tr><td><input type="checkbox"/> ITM_VENDOR_LOC</td><td>Vendor Location Item Table</td></tr> </tbody> </table>		Record (Table) Name	Record Description	<input checked="" type="checkbox"/> BU_ITEMS_INV	Operating Inventory Record	<input type="checkbox"/> BU_ITEMS_WTVOL	Item Weight/Volume by UOM	<input type="checkbox"/> EN_REVISION	Item/Revision Record	<input type="checkbox"/> INV_ITEM_UOM	Inv Unit of Measure Conversion	<input type="checkbox"/> INV_ITEMS	Inventory Item Master	<input type="checkbox"/> ITM_VENDOR	Vendor Item Table	<input type="checkbox"/> ITM_VENDOR_LOC	Vendor Location Item Table	Execute Request View Operating Inventory Record Data View Operating Inventory Record Log	
Record (Table) Name	Record Description																		
<input checked="" type="checkbox"/> BU_ITEMS_INV	Operating Inventory Record																		
<input type="checkbox"/> BU_ITEMS_WTVOL	Item Weight/Volume by UOM																		
<input type="checkbox"/> EN_REVISION	Item/Revision Record																		
<input type="checkbox"/> INV_ITEM_UOM	Inv Unit of Measure Conversion																		
<input type="checkbox"/> INV_ITEMS	Inventory Item Master																		
<input type="checkbox"/> ITM_VENDOR	Vendor Item Table																		
<input type="checkbox"/> ITM_VENDOR_LOC	Vendor Location Item Table																		

Catalog Maintenance Extract page

Delete Pending Stage Records	Select to delete rows in the item staging table from a previous extraction process. This option enables you to purge existing data for this template in the item staging tables.
Execute Request	Click the Execute Request button to run the PeopleCode that extracts the data. The records that you select on this page are retrieved from the item master tables and placed in the item staging tables.
View Data	Click to access the Select Fields page, where you can select the fields to view. Then click OK on the Select Fields page to access the View Data page, where you can review data. The text of this link changes depending on the record that is selected in the Record (Table) Name field.
View Log	Select to access the View Log page, where you can view information about updates that are made by using this selection criteria ID. The information on this page can be useful for backtracking purposes. The text of this link changes depending on the name of the record that is selected in the Record (Table) Name field.

Viewing Data Before Extraction

To view the data that will be extracted:

1. Select the check box next to the item master table to be viewed.
2. Click the View Data link on the Catalog Maintenance Extract page to access the Select Fields page.
3. Select the fields that you want to view and then click OK.

The View Data page appears.

Filtering Items Before Extraction

To filter items before extracting them:

1. Access the Catalog Maintenance Extract - Global Criteria page.
2. Use the fields on this page to filter items that you do not want to extract.

The screenshot shows the 'Global Criteria' page of the Catalog Maintenance Extract. At the top, it displays the User ID (SAMPLE), SetID (SHARE), Template ID (MAINTSTAGE), and Selection Criteria ID (MAINEXTRCT). A checkbox for 'Delete Pending Stage Records' is checked. Below this, the 'Select Record' section shows the Record (Table) Name as 'MASTER_ITEM_TBL' (Item Master Header Table). The 'Enter Criteria' section contains two rows of filtering conditions:

Condition	Field Name	Operator	Value
AND	SETID	Equal	SHARE
	INV_ITEM_ID	Equal	10002

Global Criteria page

Select Record

Select the records that you want to include in the global criteria. This narrows the scope of fields that you want to update.

Record (Table) Name

Enter the record that you want to include in the global criteria. This record determines which fields are available for selection in the Enter Criteria scroll area.

Enter Criteria

Define field criteria to use to narrow the scope of the item data update. For example, select Field Name *ACCOUNT*, Operator *Equal*, and Value *212020* to isolate the item data updates to items that are associated with account 212020.



Click the View Values button to access the Select Valid Value page, where you can select values to use as filters in the Value field.



Click the Choose a date button next to a date field to display a button and select a date.

Note. When entering criteria for an effective-dated record, these two criteria are assumed when extracting the data if no criteria were entered for the fields:

Effective Date (EFFDT) equals the maximum date prior or equal to the current date.

Status of Effective Date (EFF_STATUS) equals A (Active).

See Also

[Chapter 6, “Using Item Catalog Maintenance,” Creating and Using Catalog Maintenance Templates, page 146](#)

[Chapter 6, “Using Item Catalog Maintenance,” Selecting Values to Filter Data, page 153](#)

Selecting Values to Filter Data

Access the Select Valid Values page. This page is accessible only when the selected field name on the Catalog Maintenance Extract - Global Criteria page has associated value prompts. Select the value that you want to use as a filter in combination with the value in the Operator field on the Catalog Maintenance Extract - Global Criteria page.

See Also

[Chapter 6, “Using Item Catalog Maintenance,” Filtering Items Before Extraction, page 152](#)

Updating Staged Item Data

This section discusses how to:

- Update item records and fields.

- Select values for the associated fields.
- Preview item data changes.
- View logs for previous catalog maintenance updates.
- Select subquery criteria.

The PeopleSoft staged item update functionality enables you to efficiently update item data in the Item Loader staging tables in a secure and controlled environment. Using catalog maintenance templates and the pages in the Catalog Maintenance Update component, you can specify the values with which to update existing records and fields and narrow the scope of the fields to update.

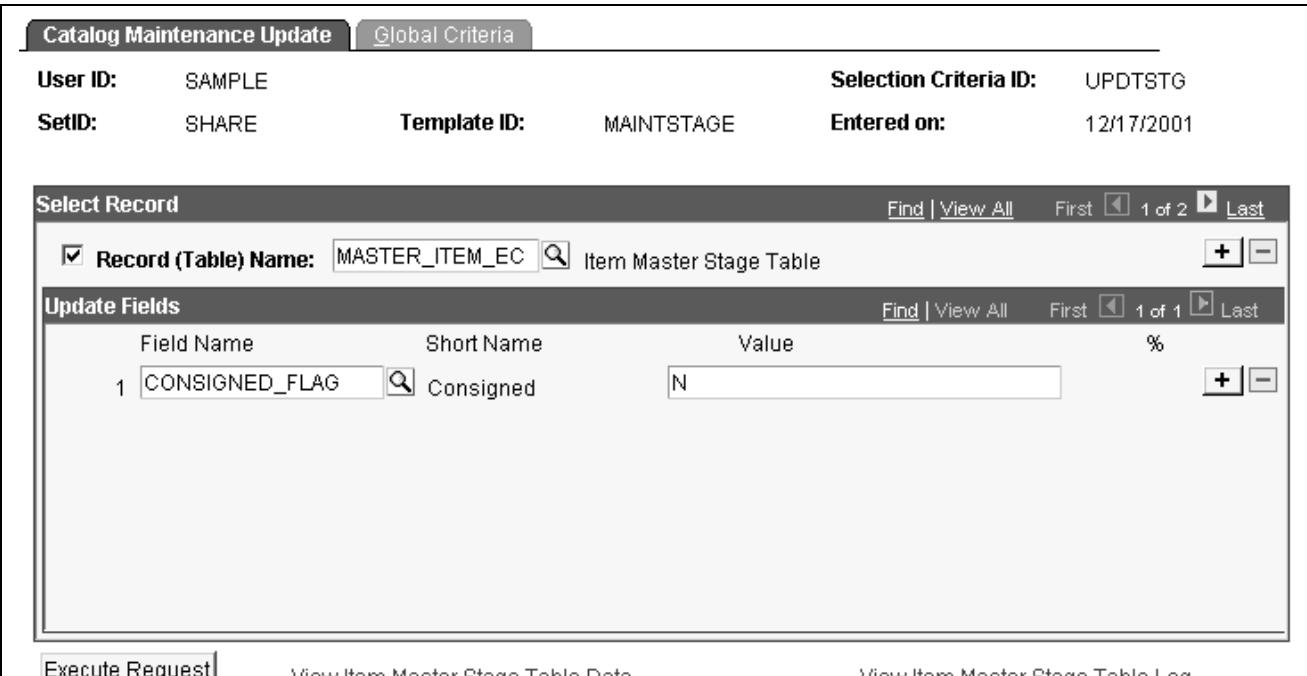
Pages Used to Update Staged Item Data

Page Name	Object Name	Navigation	Usage
Catalog Maintenance Update	PO_MASS_UPDATE	Data Exchanges, Process Transactions, Items, Catalog Maintenance Update	Select item data records and fields that you want to update. Specify the values with which you want to update the item data. After you save the information that you enter in this component, you can return and carry out the same item data changes by selecting the same control ID.
Select Valid Value	PO_MASS_VAL_SEL	Click the View Value button on the Catalog Maintenance Update page or the Catalog Maintenance Update - Global Criteria page.	View and select values for the associated field. This page is accessible only when the selected field name has associated value prompts.
View Data	MASS_VIEW	Click the View Data link on the Catalog Maintenance Update page. Click OK on the Select Fields page.	Preview the item data changes that you specified on the Catalog Maintenance Update pages.
Select Fields	PO_MASS_FLD_SEL	<ul style="list-style-type: none"> • Click the View Data link on the Catalog Maintenance Update page. • Click the Select Fields link on the Catalog Maintenance Update - Global Criteria page. The link text changes depending on the value selected in the Record (Table) Name field. 	<ul style="list-style-type: none"> • When accessed from the Catalog Maintenance Update page, view the fields that you have chosen to update. • When Accessed from the Catalog Maintenance Update - Global Criteria page, select the fields to include in the global criteria. <p>See Chapter 6, “Using Item Catalog Maintenance,” Selecting and Viewing Catalog Maintenance Update Fields , page 149.</p>

Page Name	Object Name	Navigation	Usage
View Log	PO_MASS_LOG	Click the View Log link on the Catalog Maintenance Update page.	View information about updates to item data that are made by using the selected control ID. The information on this page can be useful for backtracking purposes. Each time you click the Execute button on the Catalog Maintenance Update page for a control ID, a new log record is created.
Catalog Maintenance Update - Global Criteria	PO_MASS_GLB_CRTRIA	Data Exchanges, Process Transactions, Items, Catalog Maintenance Update, Global Criteria	Specify any criteria that you want to use to narrow the scope of records to be updated.

Updating Item Records and Fields

Access the Catalog Maintenance Update page.



The screenshot shows the Catalog Maintenance Update page. At the top, there are tabs for 'Catalog Maintenance Update' (selected) and 'Global Criteria'. Below the tabs, there are input fields for 'User ID' (SAMPLE), 'SetID' (SHARE), 'Template ID' (MAINTSTAGE), 'Selection Criteria ID' (UPDTSTG), and 'Entered on' (12/17/2001). The main area is divided into two sections: 'Select Record' and 'Update Fields'. The 'Select Record' section shows a table with one row selected, labeled 'MASTER_ITEM_EC' (Item Master Stage Table). The 'Update Fields' section shows a table with one row selected, labeled 'CONSIGNMENT_FLAG' (Consigned). At the bottom of the page are buttons for 'Execute Request', 'View Item Master Stage Table Data', and 'View Item Master Stage Table Log'.

Catalog Maintenance Update page

Entered On Displays the date that the selection criteria ID was created.

Select Record

Record (Table) Name Select the record that you want to update. Only records that are defined in the selected template ID are available for selection. Select the check box next to this field to activate the links at the bottom of the page.

Update Fields

Select the fields that you want to update and define the values with which you want to update the fields.

Field Name	Enter the object name of the field to be updated. Fields that are available for selection are based on the table that is selected in the Record (Table) Name field. The system provides any prompts that are associated with the field that you select. If prompts are applicable, the View Values button becomes available for use with the Value field. If the selected field is numeric, the % field becomes available for entry. The fields that are available for selection depend on the selected template ID.
Value	Value with which the selected field will be updated. If the % field is also available for entry, enter a value in only one of these fields.
%	If the selected field name is numeric, this field is available for entry, in addition to the Value field. Enter a value in only one of these fields. For example, if you want to update item pricing by a specific percentage increase or decrease, enter a value in the % field.
Execute Request	Click to carry out the item data updates that you have defined.

Selecting Values for Associated Fields

Access the Select Valid Value page.

Select	Select the appropriate field value and click OK. The value that you selected appears on the page that you used to access the Select Valid Value page.
---------------	---

Previewing Item Data Changes

Access the View Data page.

Rows	Number of rows that will be altered by updates that are defined on the Catalog Maintenance Update pages.
-------------	--

The column headings that appear on this page depend on the item data updates that you defined on the Catalog Maintenance Update pages.

The information that appears in the columns provides a preview of the changes that will be made to the item data.

Viewing Logs for Previous Catalog Maintenance Updates

Access the View Log page.

Item Ctlg Maint Update ViewLog

User ID:	SAMPLE	Selection Criteria ID:	UPDTSTG
SetID:	SHARE	Template ID:	MAINTSTAGE
Entered on:	12/17/2001		

Update Log

Find View All		First	1 of 1	Last
Record (Table) Name:	MASTER_ITEM_EC			
User ID:	SAMPLE			
Datetime Modified:	09/08/03 4:51PM			
Count:	0.00			
Scope of Work:	<pre>UPDATE PS_MASTER_ITEM_EC SET CONSIGNING_FLAG = 'N' WHERE (SETID = 'SHARE' AND ITM_TMPLT_ID = 'MAINTSTAGE') AND EXISTS (SELECT X FROM PS_EO_EIP_CTL D WHERE D.EIP_CTL_ID = PS_MASTER_ITEM_EC.EIP_CTL_ID AND D.EIP_DTA_STATUS IN('0', '4'))</pre>			

Item Ctlg Maint Update ViewLog page

Update Log

Record (Table) Name	Displays the name of the record updated.
User ID	Displays the user ID of the person who carried out the item update process.
Datetime Modified	Displays the date and time when the update was performed.
Count	Displays the number of records that were updated.
Scope of Work	Display the information about the changes made by the selected update.

Selecting Subquery Criteria

Access the Catalog Maintenance Update - Global Criteria page.

The screenshot shows the 'Global Criteria' page of the Catalog Maintenance Update application. At the top, there are two tabs: 'Catalog Maintenance Update' and 'Global Criteria', with 'Global Criteria' being the active tab. Below the tabs, there are two rows of input fields:

User ID:	SAMPLE	Selection Criteria ID:	UPDTSTG
SetID:	SHARE	Template ID:	MAINTSTAGE

Below these fields is a section titled 'Select Record' with a sub-section 'Enter Criteria'. The 'Record (Table) Name' is set to 'MASTER_ITEM_EC' (highlighted in red). The 'Enter Criteria' section contains a table with the following data:

Condition	Field Name	Operator	Value
	SETID	Equal	SHARE

Global Criteria page

Select Record

Select the records that you want to include in the global criteria. This narrows the scope of fields that you want to update.

Record (Table) Name Enter the record that you want to include in the global criteria. This record determines which fields are available for selection in the Enter Criteria scroll area.

Enter Criteria

Use the Enter Criteria scroll area to define field criteria to narrow the scope of the item data update. For example, select Field Name *ACCOUNT*, Operator *Equal*, and Value *212020* to isolate the item data updates to items that are associated with account 212020.



Click the View Values button to access the Select Valid Value page, where you can select values to use as filters in the Value field.



Click the Choose a date button next to a date field to display a button and select a date.

See Also

[Chapter 6, “Using Item Catalog Maintenance.” Creating and Using Catalog Maintenance Templates, page 146](#)

[Chapter 6, “Using Item Catalog Maintenance,” Selecting Values to Filter Data, page 153](#)

CHAPTER 7

Using Group Purchasing Organizations

This section provides an overview of group purchasing organization (GPO) contracts and discusses how to:

- Define GPO contracts.
- Load GPO contracts.
- Calculate distributor prices.

Understanding GPO Contracts

The GPO feature enables you to record and use contract pricing negotiated by group purchasing organizations on behalf of an organization. You can record the GPO contract within the PeopleSoft system by loading the contract and then accepting only the contract items used by the organization. You can use PeopleSoft GPOs to:

- Load contract price and item data from XML or flat files.
The source of the data could be the manufacturer, distributor, or the group purchasing organization.
- Select the information from the GPO contract to be used by the organization.

As GPO contract information is loaded, you control the addition of new items, price changes, and new units of measure (UOMs).

- Automatically calculate the distributor price used on the purchase order.

The distributor prices are stored in the item tables and can be recalculated at any time. The distributor price is based on the manufacturer's price plus the distributor markup.

- Run PeopleSoft reports to review items purchased by GPO, GPO contract, manufacturer, or distributor.
- Track contract commitments including multiple levels of pricing tiers based on amount or percentage.
- Review rebates received per GPO contract.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, “PeopleSoft Purchasing Reports”

Common Elements Used in This Chapter

GPO ID	A unique alphanumeric code assigned to each group purchasing organization.
GPO Contract and GPO Contract Number	A unique alphanumeric code assigned to each contract from a group purchasing organization.

Manufacturer's Price	The price per unit on the Item Manufacturer GPO page.
Distributor's Price	The price located on the Vendor's UOM & Pricing Info (vendors unit of measure and pricing information) page. This is the price used on the purchase orders.

Defining GPO Contracts

To define manufacturers, GPO manufacturers, rebates, definitions, and distributors, use the Manufacturer (MANUFACTURER), GPO Manufacturer (MFG_GPO), GPO Rebates (MFG_GPO_REBATE), GPO Definition (GPO_NAME), and GPO Distributor (MFG_GPO_VENDOR) components.

The steps for defining GPO contracts are:

1. On the Manufacturer page, define a manufacturer ID for each manufacturer of contract items.
2. Using the Vendor Information component, define each distributor as a PeopleSoft vendor.
If you can buy directly from the manufacturer of the item, the manufacturer should also be defined as a vendor.
3. On the Define GPO page, define a GPO ID for each group purchasing organization.
4. On the Define GPO Manufacturer page, define each GPO contract with a GPO contract ID and contract details.
5. (Optional) On the Tier Requirements page, identify any tier requirements contained in the GPO contract.
6. On the GPO Distributor page, enter the GPO contract distributors (vendors) and their markup percentages.
7. (Optional) On the Define GPO Rebates page, enter any GPO contract rebates received.

See Also

[Chapter 7, “Using Group Purchasing Organizations,” Calculating Distributor Prices, page 170](#)

[Chapter 7, “Using Group Purchasing Organizations,” Defining GPO Distributors, page 162](#)

[Chapter 7, “Using Group Purchasing Organizations,” Defining GPO Manufacturers, page 161](#)

[Chapter 7, “Using Group Purchasing Organizations,” Loading GPO Contracts, page 163](#)

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

Pages Used to Define GPO Contracts

Page Name	Object Name	Navigation	Usage
Manufacturer	MANUFACTURER	Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Manufacturer	Define each manufacturer of items.
Vendor	VNDR_ID1	<ul style="list-style-type: none"> Vendors, Vendor Setup/Maintenance, Vendor Approval, Identifying Information Grants, Subrecipients, Subrecipients, Identification Vendors, Vendor Setup/Maintenance, Vendor Information, Identifying Information 	Define each distributor of GPO contract items as a vendor.
Define GPO	GPO_NAME	Purchasing, Procurement Contracts, Create GPO Contracts, Name, Define GPO	Define each group purchasing organization with a GPO ID.
Define GPO Manufacturer	MFG_GPO	Purchasing, Procurement Contracts, Create GPO Contracts, GPO Manufacturer, Define GPO Manufacturer	Define each GPO contract with a GPO contract ID and enter the contract details.
Tier Requirements	MFG_GPO_REQ	Click the More link on the Define GPO Manufacturer page. Enter a value in the Contract Tier Level field.	Enter any details concerning the GPO contract's tier requirements.
GPO Distributor	MFG_GPO_VENDOR	Purchasing, Procurement Contracts, Create GPO Contracts, Distributor, GPO Distributor	Enter the GPO contract distributors (vendors) and their markup percentages.
Define GPO Rebates	MFG_GPO_REBATE	Purchasing, Procurement Contracts, Create GPO Contracts, Rebates, GPO Rebates	Enter any rebates received for this GPO contract. Update this page whenever a rebate is received against this contract.

See Also

PeopleSoft Setting Up Procurement Options 8.8 PeopleBook, “Defining Procurement Options,” Defining Manufacturer IDs

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

Defining GPO Manufacturers

Access the Define GPO Manufacturer page.

Buy from this Manufacturer	Select if you can buy items directly from the manufacturer. The system creates a record on the GPO distributor table for the manufacturer, with default markup of 0.
Vendor ID	Enter the manufacturer's vendor ID if you can buy directly from the manufacturer.
Committed Contract	Select this check box if you are committed by this contract to purchase a minimum level calculated by amount, by percentage, or both.
Commitment % (commitment percentage)	Enter a percentage if the contract commitment is based on the percentage of overall spending for the organization.
Commit Level Amount	Enter the amount that must be purchased based on the contract commitment.
Contract Tier Level	If the contract's commitments have multiple purchase levels, then enter the contract tier designation (for example; tier 1, tier 2, and so on). Enter the tier pricing that applies to the organization.
Tier Requirements	If the contract commitments have multiple purchase levels, then enter the organization's requirements (for example, amount per year) for the contract tier levels.
More	Click for more space to document the contract tier levels and their requirements.
Price Expiration Date	Enter the expiration date for the contract pricing.
Maximum % Increase (maximum percentage increase)	Enter a percentage to indicate contractual price change limits. Price increases can be approved on the GPO Item Selection page.
Increase Type	Select the base for the calculation of the price increase percentage. Options are: <ul style="list-style-type: none">• <i>% of CPI</i>: Percentage of consumer price index.• <i>% of MPI</i>: Percentage of medical price index.• <i>Straight %</i>: Percentage of existing manufacturer price.
Rebate Frequency	If rebates are received per this contract, enter the time period for rebate calculation. Options are: <ul style="list-style-type: none">• <i>Annual</i>: Rebates are calculated once per year.• <i>Quarterly</i>: Rebates are calculated four times per year.• <i>Sem Annual</i>: Rebates are calculated twice per year.

See Also

[Chapter 7, “Using Group Purchasing Organizations,” Approving GPO Items for Loading, page 168](#)

Defining GPO Distributors

Access the GPO Distributor page.

This page defines the distributors (vendors) associated with the GPO contract.

Vendor Information

Priority

Enter the vendor's priority number to identify primary, secondary, and tertiary distributors. Use the insert-row feature to add as many distributors as needed.

Price/Contract Info

Markup % (markup percentage)

Enter the markup percentage that the system applies to the manufacturer's price to create the distributor purchase price.

Contract ID

Select any standard contract opened for this vendor. Purchases can be reported against both a GPO contract and a standard contract.

Loading GPO Contracts

You can automatically load GPO contract prices into the PeopleSoft system. The data can be in the form of an XML file or a flat file. The GPO contract can be received directly from the GPO, the manufacturer, or the distributor.

When contract prices are loaded:

- The manufacturer's price is inserted into the price per unit field on the Item Manufacturer GPO page.
- (Optional) The item's standard price on the Purchasing Attributes page is updated with the manufacturer's price.
- New items are added that do not currently exist in the item master tables.

These new items must be approved using the GPO Item Selection page.

Units of measure and conversion rates appear on the GPO Item Selection page for approval. If the unit of measure is not defined in the PeopleSoft system, you must add it manually using the Units of Measure page.

The steps for loading GPO contracts are:

1. Confirm that the GPO contract has been defined.

See [Chapter 7, "Using Group Purchasing Organizations," Defining GPO Contracts, page 160](#).

2. Verify that the file contains the required data fields (Set ID, Manufacturer ID, Manufacturer Item ID, GPO Contract Number, UOM, Price, and Price Effective Date).

This information could be in an XML document or a flat file.

3. Run the message for GPO contracts.

The data is now stored in the GPO Staging table (GPO_ITM_EC).

4. Once this process is finished, check for errors by reviewing the Data Definition Maintenance page.

If errors exist, click the Details buttons to access the GPO Item Load Error Page where you can correct the data.

See [Chapter 7, "Using Group Purchasing Organizations," Correcting GPO Item Load Errors, page 168](#).

See *PeopleSoft Supply Chain Management Integration 8.8 PeopleBook*, “Managing PeopleSoft Supply Chain Management Integration Points,” Using Data Definition Maintenance.

5. Use the GPO Item Selection page to approve items and prices to load, to approve new items, and to approve new units of measure.

Only items marked as approved create item loader staging records. To approve, select the row and save the page. For items that currently do not exist in the PeopleSoft system, enter an item category in the category code field. This enables the system to find necessary default data for the new item. Add any new units of measure using the Units of Measure page.

See [Chapter 7, “Using Group Purchasing Organizations,” Approving GPO Items for Loading, page 168](#).

See *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,” Entering Units of Measure.

6. Run the GPO Manufacturer Price Load Application Engine process (PO_GPOMFG_PR) to load the manufacturer prices from the GPO Staging table into the Item Loader staging tables.

See [Chapter 7, “Using Group Purchasing Organizations,” Running the GPO Manufacturer Price Load Application Engine Process \(PO_GPOMFG_PR\), page 169](#).

7. Run the Item Loader process to put the data in the PeopleSoft production tables.

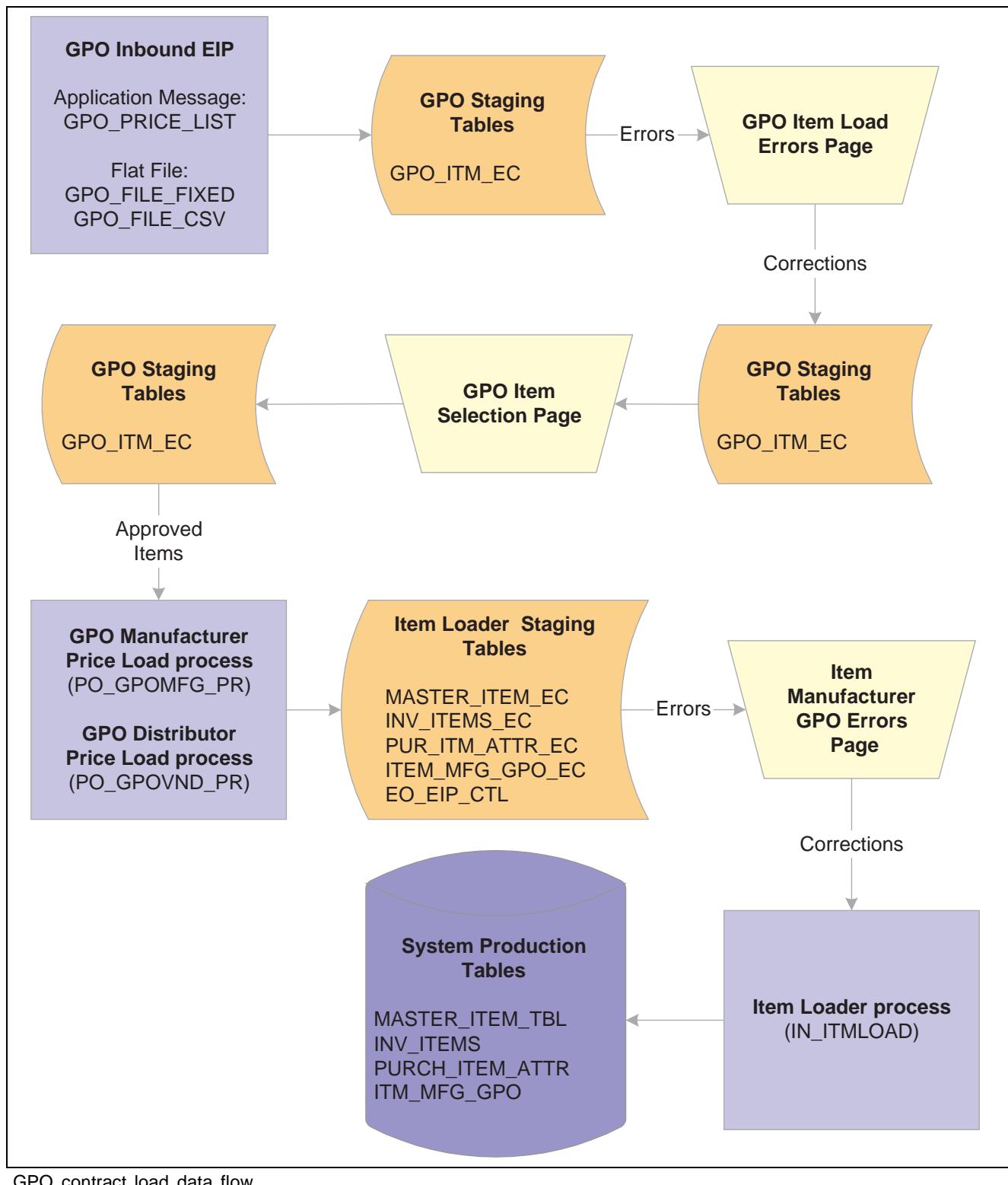
On the Item Loader process page, select the Item Mfg GPO (item manufacturing group purchasing organization) option for the item load type.

8. When the Item Loader process is complete, you can view the manufacturer prices on the Item Manufacturer GPO page.

See [Chapter 7, “Using Group Purchasing Organizations,” Viewing Item Manufacturer GPO Prices, page 170](#).

Warning! When loading the GPO contract, if a PeopleSoft item ID does not exist for a manufacturer ID or manufacturer item ID with multiple units of measure, the load process could create separate PeopleSoft item IDs for each unit of measure. Review the GPO Item Selection page closely.

This diagram illustrates the data flow for loading GPO contract data:



Pages Used to Load GPO Contracts

Page Name	Object Name	Navigation	Usage
GPO Load Maintenance	GPO_LOAD_MAINT	Data Exchanges, Transaction Error Handling, Maintain Data Definitions, Data Def Maint Select MFG GPO Item Price List in the Transaction Type field and click the Search button.	Access the GPO Item Load Error page. See <i>PeopleSoft Supply Chain Management Integration 8.8 PeopleBook</i> , “Managing PeopleSoft Supply Chain Management Integration Points,” Using Data Definition Maintenance.
GPO Item Load Error	GPO_ITM_EC	 Click the GPO Details button on the GPO Load Maintenance page.	Correct any errors in the load process.
GPO Item Selection	GPO_ITM_SELECT	Data Exchanges, Create Transactions, GPO Item Selection	Review and update any price changes, new items, or new units of measure. Approval is required to load this data.
Units of Measure	UNITS_OF_MEASURE	Set Up Financials/Supply Chain, Common Definitions, Units of Measure, Units of Measure	Enter any new units of measure loaded with the GPO contract.
GPO Load Manufacturer Price	RUN_GPO_MFG_PRICE	Data Exchanges, Process Transactions, Items, GPO Load Manufacturer Price	Run the PO_GPOMFG_PR Application Engine process to load the manufacturer prices from the GPO Staging table into the item loader staging tables.
GPO Load Distributor Price	RUN_GPO_VNDR_PRICE	Data Exchanges, Process Transactions, Items, GPO Load Distributor Price	Run the GPO Vendor Price Load Application Engine process (PO_GPOVND_PR) to load distributor prices from the GPO Staging table to the item loader staging tables. This process calculates the distributor price by increasing the manufacturers price by the markup percentage from the GPO Distributor page.
Item Loader Data Maintenance	IN_EIP__ITEM_MAINT	Data Exchanges, Transaction Error Handling, Maintain Data Definitions, Data Def Maint Select <i>ITEM</i> as the transaction type, and then click the search button.	Access the Item Manufacturer GPO Errors page.

Page Name	Object Name	Navigation	Usage
Item Manufacturer GPO Errors	IN_EIPITM_MFG_GPO	Click the Item MFG GPO link on the MFG GPO Item Maintenance page	Correct any errors in the item loader staging tables before running the Item Loader process.
Item Loader	RUN_IN_ITMLOAD	Data Exchanges, Process Transactions, Items, Item Loader	This process loads the PeopleSoft application tables with the data in the item loader staging tables.
Item Manufacturer GPO	ITM_MFG_GPO	Items, Define Items and Attributes, Define Item, Define Item - General Click the Manufacturers link; then click the GPO Pricing link.	View the manufacturer's price for the item. The price is stored by a combination of setID, item ID, UOM, manufacturer ID, GPO ID, GPO contract number, and currency.

See Also

[Chapter 5, “Loading Items.” Understanding Item Loader Data Flow, page 123](#)

[Chapter 4, “Defining Items,” page 65](#)

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,” Entering Units of Measure

Loading GPO Data Using Messaging

Use the message GPO_PRICE_LIST to load the GPO contract data into the GPO Staging table (GPO_ITM_EC). This subscription message performs the basic validation and assigns the default values.

Message Channel	GPO_PRICE_LIST
Message Definition	ITEM_MFG_GPO_LOAD
Message Node	PSFT_EP

The message contains these fields:

SET ID	Required
MANUFACTURER ID	Required
MANUFACTURER ITEM ID	Required
GPO CONTRACT NUMBER	Required
GPO ID	Optional

ITEM DESCRIPTION	Optional
MFR ITEM CATEGORY	Optional
UOM	Required
CONVERSION RATE	Optional
BASE UNIT OF MEASURE	Optional
PRICE	Required
CURRENCY	Optional
PRICE EFFECTIVE DATE	Required
PRICE EXPIRATION DATE	Optional

Note. To load a flat file, use the PeopleSoft data integration utilities for mapping. For loading flat files into the message, use the Inbound File Publish Application Engine process (EOP_PUBLISHF).

Correcting GPO Item Load Errors

Access the GPO Item Load Errors page.

Once the message process is finished, check for errors by reviewing the Data Definition Maintenance page. If errors exist, click the Details buttons to access the GPO Item Load Error page, where you can correct the data.

Common errors include missing data and data that could not be validated in the PeopleSoft system, such as an incorrect manufacturer ID. The data displayed is located in the GPO Staging table (GPO_ITM_EC). Use this page to correct data or add missing information.

See Also

PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, “Managing PeopleSoft Supply Chain Management Integration Points,” Processing Inbound Application Message Transactions

PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, “Managing PeopleSoft Supply Chain Management Integration Points,” Using Data Definition Maintenance

Approving GPO Items for Loading

Access the GPO Item Selection page.

Use the GPO Item Selection page to approve the items for loading into the PeopleSoft system. This page displays the items in the GPO staging table that do not have an error status. When you approve a line, the approval flag is set to *Yes*. Only lines that you approve on this page are available for further processing. There are a number of reasons for this approval step. The approval step enables you to:

- Select items for the organization.

Group purchasing organizations may send pricing information for many items that are not purchased by the organization. Use this page to approve the items to load into the PeopleSoft tables.

- Add new items in PeopleSoft.

Occasionally, an item appears that does not currently exist in the PeopleSoft item tables. To add this item to the PeopleSoft system, enter an item category code and approve the item.

- Review pricing for the items displayed.

Prices displayed on this page are loaded into the PeopleSoft system only if the line is approved.

- Review new units of measure.

Units of measure that do not currently exist in the PeopleSoft system must be manually added to the Units of Measure page, then approved on this page.

- Verify or change the conversion rate.

To review and approve an item:

1. Enter values in the SetID, Manufacturer ID, GPO ID, and GPO Contract fields.

These are required entries before initiating a search.

2. (Optional) Select a manufacturer (item) category.

If you are loading a large GPO contract, selecting a manufacturer (item) category can reduce the display to a reasonable size.

3. (Optional) Use the Item Selection field to narrow the search to lines with or without PeopleSoft item IDs.

Users can select items without a PeopleSoft item ID. This feature enables users to identify and update items that need additional information to pass through the Item Loader process without error.

4. Click the Search button.

The system displays the selection.

5. To approve an item, select the Approved check box and save the page.

The Select All button enables you to quickly approve all items displayed.

Running the GPO Manufacturer Price Load Application Engine Process (PO_GPOMFG_PR)

Access the GPO Manufacturer Price Load process page.

This process populates the Item Loader staging tables required for populating the manufacturer price. The tables populated are:

- EO_EIP_CTL
- MASTER_ITEM_EC

- INV_ITEMS_EC
- PUR_ITM_ATTR_EC

The process also loads the item loader staging record, ITEM_MFG_GPO_EC.

Update Standard Purchase Price Select to insert the manufacturer's price (from the external file) as the standard price in the Purchasing Attributes table (PUR_ITM_ATTR_EC).

Running the GPO Distributor Price Load Process (PO_GPOVND_PR)

Access the GPO Load Distributor Price page. Use the controls on this page to determine parameters for the distributor (vendor) prices you want to load.

Correcting Item Manufacturer GPO Errors

This page allows you to correct errors after prices have been loaded for Manufacturers and Distributors.

See [Chapter 7, “Using Group Purchasing Organizations,” Running the GPO Manufacturer Price Load Application Engine Process \(PO_GPOMFG_PR\), page 169.](#)

See [Chapter 7, “Using Group Purchasing Organizations,” Running the GPO Distributor Price Load Process \(PO_GPOVND_PR\), page 170.](#)

Access the Item Manufacturer GPO Errors page. Use the page controls to enter corrections. Corrections entered here will be entered into the Item Loader Staging tables.

Viewing Item Manufacturer GPO Prices

Access the Item Manufacturer GPO page.

Price Per Unit The manufacturer's price. This price can be loaded from an external file or manually updated. The manufacturer's price is increased by the distributor's markup percentage to obtain the purchase price.

Calculating Distributor Prices

This section gives you an overview of calculating distributor prices and explains how to do it.

The distributor price is critical since it is used to price the items on the purchase order. These prices are stored in the price field of the Vendor's UOM & Pricing Info page. The distributor price is the manufacturer's price plus the distributor markup from the GPO Distributor Page.

See [Chapter 7, “Using Group Purchasing Organizations,” Defining GPO Distributors, page 162.](#)

Multiple distributor prices can be derived from one manufacturer's price. The Vendor's UOM & Pricing Info page is also updated with the current units of measure and conversion rates. The manufacturer is defaulted as the primary manufacturer for the item.

The distributor price should be recalculated whenever:

- GPO contracts are loaded.
- Distributor markups are changed.
- GPO contracts are manually entered or changed.

The steps involved in calculating the distributor prices are:

1. Add or change the pricing data by loading a GPO contract or manually entering data on the Item Manufacturer GPO Page and the GPO Distributor page.

See [Chapter 7, “Using Group Purchasing Organizations,” Viewing Item Manufacturer GPO Prices, page 170.](#)

See [Chapter 7, “Using Group Purchasing Organizations,” Defining GPO Distributors, page 162.](#)

2. Run the GPO Vendor Price Load process to calculate the distributor prices.

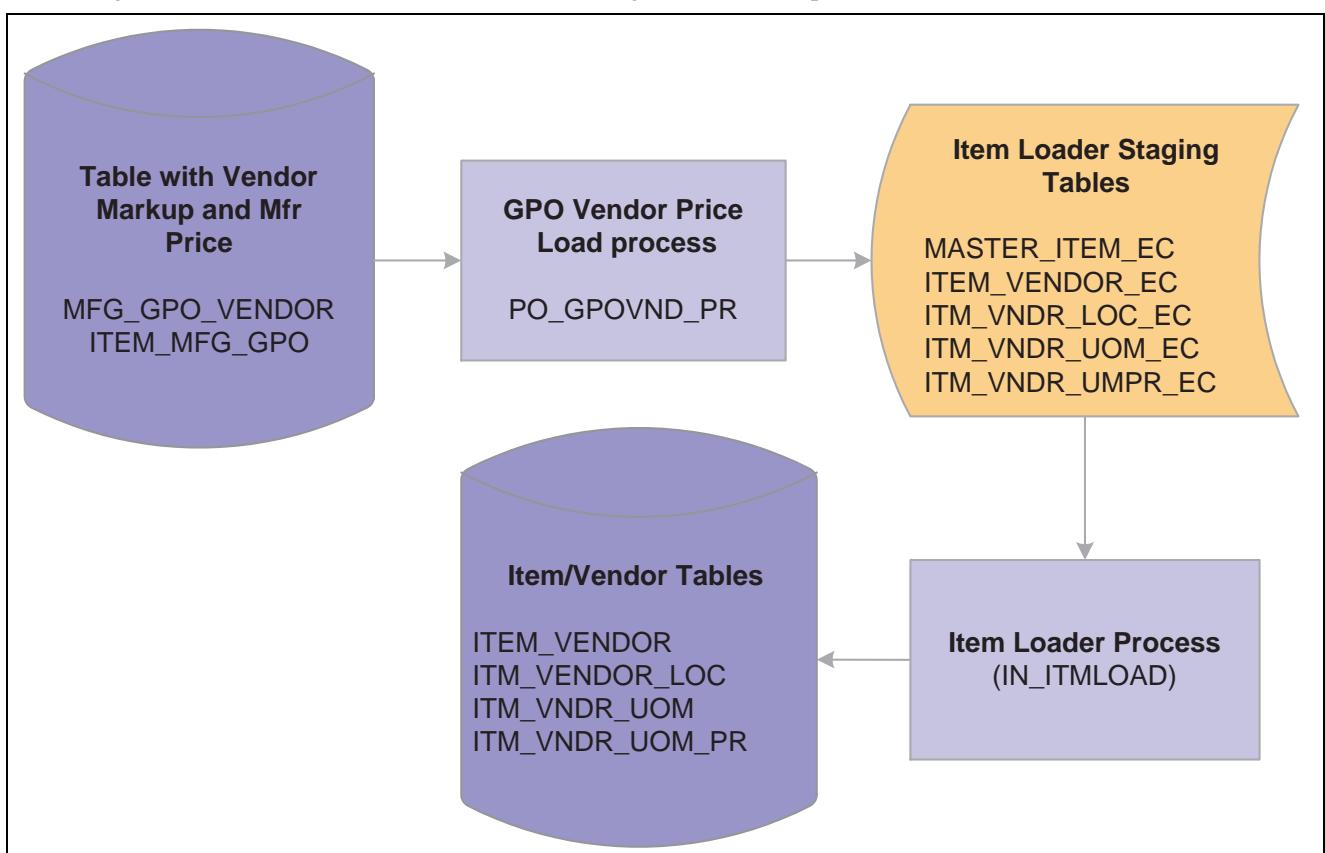
This process populates the Item Loader Staging tables.

See [Chapter 7, “Using Group Purchasing Organizations,” Running the GPO Distributor Price Load Process \(PO_GPOVND_PR\), page 170.](#)

3. Run the Item Loader process to put the distributor price data in the PeopleSoft production tables.

On the Item Loader process page, select the Item Mfg GPO option for the item load type. When the process is complete, you can view the distributor prices on the Vendor’s UOM & Pricing Info page.

This diagram illustrates the data flow for calculating GPO vendor prices:



Vendor prices calculation process flow

Pages Used to Load GPO Contracts

Page Name	Object Name	Navigation	Usage
GPO Distributor	MFG_GPO_VENDOR	Purchasing, Procurement Contracts, Create GPO Contracts, Distributor, GPO Distributor	Enter or change the GPO contract distributors (vendors) and their markup percentages.
Item Manufacturer GPO	ITM_MFG_GPO	Items, Define Items and Attributes, Define Item - General page. Click the Manufacturers link, then click the GPO Pricing link.	Store the manufacturer's price for the item.
GPO Load Distributor Price	RUN_GPO_VNDR_PRICE	Data Exchanges, Process Transactions, Items, GPO Load Distributor Price	Run the GPO Distributor Price Load process (PO_GPOVND_PR), which calculates distributor prices and loads them into the item loader staging records to update vendor prices for distributors associated with a GPO contract.
Item Loader	RUN_IN_ITMLOAD	Data Exchanges, Process Transactions, Items, Item Loader	Run the Item Load process to load the PeopleSoft application tables with the data in the Item Loader staging tables.
Vendor's UOM & Pricing Info	ITM_VENDOR	Items, Define Items and Attributes, Purchasing Attributes, Item Vendor Click the Item Vendor UOM link.	Store the distributor's price for the item. This is the price used on the purchase order.

See Also

[Chapter 7, “Using Group Purchasing Organizations,” Defining GPO Distributors, page 162](#)

[Chapter 7, “Using Group Purchasing Organizations,” Viewing Item Manufacturer GPO Prices, page 170](#)

[Chapter 5, “Loading Items,” Loading Staged Item Data Using the Item Master EIP, page 130](#)

PeopleSoft Purchasing 8.8 PeopleBook, “Defining Purchasing Item Information,” Defining Purchasing Item Vendor Unit of Measure and Pricing Information

[Chapter 4, “Defining Items,” page 65](#)

Running the GPO Vendor Price Load Application Engine Process (PO_GPOVND_PR)

Access the GPO Vendor Price Load process page.

This process calculates the distributor price by increasing the manufacturer's price by the markup percentage from the GPO Distributor page.

See [Chapter 7, “Using Group Purchasing Organizations,” Defining GPO Distributors, page 162.](#)

The process stores data in these item staging tables:

- MASTER_ITEM_EC
- ITEM_VENDOR_EC
- ITM_VNDR_LOC_EC
- ITM_VNDR_UOM_EC
- ITM_VNDR_UMPR_EC

The Item Loader process then moves the distributor prices into the item production tables.

Vendor Set ID, Short Vendor Name, and Vendor ID	(Optional) Use these fields to limit the processing to a particular vendor.
Override With Date	By default, the system creates prices with the effective date equal to the current date. To make prices effective on another date, select the Override With Date option and specify the effective date.

APPENDIX A

Delivered Workflow for PeopleSoft Managing Items

This appendix discusses workflows for the Managing Items PeopleBook.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Preparing to Implement PeopleSoft Inventory,”
Using Workflow in PeopleSoft Inventory

PeopleTools 8.44 PeopleBook: Workflow Technology

PeopleTools 8.44 PeopleBook: Using PeopleSoft Applications

Delivered Workflow for PeopleSoft Managing Items

This section discusses PeopleSoft Managing Items workflow. The workflows are listed alphabetically by workflow name.

Item Approval

The section discusses the item approval workflow.

Description

Event Description	This workflow routes item approvals to appropriate role users. Select item approval method on the Installation Options-Overall page.
Action Description	Selecting a worklist entry transfers you to the Item Approval page. If approval is denied, then an email is sent.
Notification Method	Email and Worklist

Workflow Objects

Event	MASTER_ITEM_TBL
Workflow Action	Route for approval
Role	Role is defined by user.
Email Template	INV_ITEM_A_WL
Business Process	Approve Inventory Items
Business Activity	Inventory Item Approval and Item Approval

Business Event	Inventory Item Approval, Inventory Item Denial, and Inventory Item Under Initialization.
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APPENDIX B

PeopleSoft Item Reports

This appendix provides an overview of item reports and enables you to:

- View a summary table of reports.
- View report details.

PeopleSoft Item Reports

This table lists the items reports sorted in alphanumerical order by report ID. The reports listed are SQR reports. If you need more information about a report, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
INS4000 Item Status Change Exception	The Item Status Change process generates this report when a scheduled item status change to <i>Inactive</i> cannot be implemented. The Item Status Change process produces two versions of this report. One version reflects scheduled <i>Inactive</i> status changes that could not be made for the item at the business unit level, the other shows <i>Inactive</i> status changes that could not be made at the setID level.	Items, Define Items and Attributes, Change Item Status	RUN_INS4000
INS9030 Device Tracking Master List	Displays device-tracked items, filtered according to the specified parameters.	Items, Reports, Device Tracking Master List	RUN_INS9030
INS9040 Basic Item Listing Report	Lists the basic attributes for each item.	Items, Reports, Basic Item Listing	RUN_INS9040
POCNT500 GPO Price Comparison (group purchase order price comparison)	Displays manufacturer prices, distributor prices, expected distributor markups, and actual item markups for all items on a GPO contract. All prices are shown in the GPO manufacturer currency. (SQR)	Purchasing, Procurement Contracts, Reports, GPO Price Comparison	RUN_POCNT500

Report ID and Report Name	Description	Navigation	Run Control Page
POCNT505 GPO Price Exception	Lists all items for which the distributor markup on the actual price does not equal that on the GPO contract. (SQR)	Purchasing, Procurement Contracts, Reports, GPO Price Exception	RUN_POCNT505
POCNT510 GPO Manufacturer Commitment	Lists the amount spent, by GPO manufacturer contract. The amounts in this report do not include distributor markup. The report is sorted by distributor (vendor) or item category. (SQR)	Purchasing, Procurement Contracts, Reports, GPO Manufacturer Commitment	RUN_POCNT510
POCNT515 GPO Distributor Commitment	Displays the total amount spent with a GPO distributor for items supplied by a particular manufacturer. Compare this report to the contract commitments made to the distributor (amount purchased per quarter, for example). (SQR)	Purchasing, Procurement Contracts, Reports, GPO Distributor Commitment	RUN_POCNT515
POCNT520 GPO Purchases	Displays the amount spent with a single group purchasing organization (GPO), including all current contracts. Amounts include distributor markups. The report is sorted by distributor (vendor) or item category code. (SQR)	Purchasing, Procurement Contracts, Reports, GPO Purchases	RUN_POCNT520

PeopleSoft Item Reports: A to Z

This section provides detailed information on individual reports. The reports are listed in alphanumerical order by report ID.

Item Status Change Exception (INS4000)

Note. If the Item Status Change process successfully implements all scheduled changes to *Inactive* status, the Item Status Change Exception report is not generated.

Exceptions can exist on the business unit or the setID level.

If an item cannot be inactivated at the business unit level, the business unit level report lists all business unit tables where transactions preventing inactivation exist.

Reference to Item Exists in Table	Business unit table that contains a record or transaction that prevents the item from being inactivated. All records or transactions are listed where this item ID still exists.
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If an item cannot be inactivated at the setID level, the setID report lists the business units where the item has not been successfully inactivated. You cannot deactivate an item at the setID level until the item has been deactivated at all business units that belong to the setID.

Business Units Where Item Not Inactive	Business units where the item's status has not been successfully changed to <i>Inactive</i> , preventing deactivation at the setID level.
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Device Tracking Master List (INS9030)

Include Inactive Items	Select to include items that are restricted to warehouse movement transactions, adjustments, RMA and RTV transactions, and receiving transaction.
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Basic Item Listing (INS9040)

For information on Basic Item Listing, see Managing Inventory by Item Status.

Glossary of PeopleSoft Terms

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

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

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

collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.
control table	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
cost profile	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost row	A 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.
dataset	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.
delivery method type	In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.
directory information tree	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
document sequencing	
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.
event propagation process	In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

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

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

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

market template

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

match group

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

MCF server

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

merchandising activity

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

meta-SQL

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

metastring

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

multibook

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

multicurrency

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

national allowance

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

node-oriented tree

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

pagelet

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

participant

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

participant object

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

See also *compensation object*.

partner

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

pay cycle

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

pending item

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

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

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

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

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

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

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

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

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PeopleSoft®

PeopleSoft Managing Items 8.8 Reports

December 2003

PeopleSoft Managing Items 8.8 Reports

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About This PeopleBook

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

This preface discusses:

- Related documentation.
- Comments and suggestions.

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This section discusses how to:

- Obtain documentation updates.
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CHAPTER 1

PeopleSoft Item Reports

This appendix provides an overview of item reports and enables you to:

- View a summary table of reports.
- View report details.

PeopleSoft Item Reports

This table lists the items reports sorted in alphanumerical order by report ID. The reports listed are SQR reports. If you need more information about a report, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
INS4000 Item Status Change Exception	The Item Status Change process generates this report when a scheduled item status change to <i>Inactive</i> cannot be implemented. The Item Status Change process produces two versions of this report. One version reflects scheduled <i>Inactive</i> status changes that could not be made for the item at the business unit level, the other shows <i>Inactive</i> status changes that could not be made at the setID level.	Items, Define Items and Attributes, Change Item Status	RUN_INS4000
INS9030 Device Tracking Master List	Displays device-tracked items, filtered according to the specified parameters.	Items, Reports, Device Tracking Master List	RUN_INS9030
INS9040 Basic Item Listing Report	Lists the basic attributes for each item.	Items, Reports, Basic Item Listing	RUN_INS9040
POCNT500 GPO Price Comparison (group purchase order price comparison)	Displays manufacturer prices, distributor prices, expected distributor markups, and actual item markups for all items on a GPO contract. All prices are shown in the GPO manufacturer currency. (SQR)	Purchasing, Procurement Contracts, Reports, GPO Price Comparison	RUN_POCNT500

Report ID and Report Name	Description	Navigation	Run Control Page
POCNT505 GPO Price Exception	Lists all items for which the distributor markup on the actual price does not equal that on the GPO contract. (SQR)	Purchasing, Procurement Contracts, Reports, GPO Price Exception	RUN_POCNT505
POCNT510 GPO Manufacturer Commitment	Lists the amount spent, by GPO manufacturer contract. The amounts in this report do not include distributor markup. The report is sorted by distributor (vendor) or item category. (SQR)	Purchasing, Procurement Contracts, Reports, GPO Manufacturer Commitment	RUN_POCNT510
POCNT515 GPO Distributor Commitment	Displays the total amount spent with a GPO distributor for items supplied by a particular manufacturer. Compare this report to the contract commitments made to the distributor (amount purchased per quarter, for example). (SQR)	Purchasing, Procurement Contracts, Reports, GPO Distributor Commitment	RUN_POCNT515
POCNT520 GPO Purchases	Displays the amount spent with a single group purchasing organization (GPO), including all current contracts. Amounts include distributor markups. The report is sorted by distributor (vendor) or item category code. (SQR)	Purchasing, Procurement Contracts, Reports, GPO Purchases	RUN_POCNT520

CHAPTER 2

Report Samples

This chapter provides report samples.

For the online samples of these reports, see the PDF files that are published on CD-ROM with your online documentation.

PeopleSoft Inventory

Report ID: INS4000

Page No. 1
Run Date 11/19/2003
Run Time 15:25:41

Item Status Change Exceptions

<u>Set ID</u>	<u>Item ID</u>	<u>Business Units Where Item Not Inactive</u>
SHARE	INV01_STD	INV01
	INV01_STD	BU_ITEMS_INV
	INV01_STD	PS_ORD_LINE

Status Cannot be changed to Inactive for Setid item: INV01_STD

Item Status Change Exceptions

<u>Set ID</u>	<u>Item ID</u>	<u>Business Units Where Item Not Inactive</u>
SHARE	INV01_SERIAL	INV01
	INV01_SERIAL	BU_ITEMS_INV

Status Cannot be changed to Inactive for Setid item: INV01_SERIAL

Item Status Change Exceptions

<u>Set ID</u>	<u>Item ID</u>	<u>Business Units Where Item Not Inactive</u>
SHARE	INV01_SHIPSERIAL	INV01
	INV01_SHIPSERIAL	BU_ITEMS_INV

Status Cannot be changed to Inactive for Setid item: INV01_SHIPSERIAL

Setid: SHR03
Category: ALL CATEGORIES
Manufacturer: ALL MANUFACTURERS
Vendor Setid: ALL VENDOR SETIDS
Vendor ID/Name: ALL VENDORS

<u>Item ID</u>	<u>Item Description</u>	<u>Category</u>	<u>Status</u>	<u>Vendor Name</u>	<u>Manufacturer</u>	<u>Manufacturer Item ID</u>
POHC1	EXAM TABLE MODEL 3000	EQPMT	Under Init	MEDICAL-001	POHC MEDIC	POHC10000000000000000
POHC2	ID BANDS	IDBND	Under Init	PAY LESS-001	POHC MEDIC	POHC1000000000000001
POHC3	3"X 3" COTTON BANDAGE	WC	Under Init	PAY LESS-001	POHC MED2	POHC2000000000000001
POHC4	SYRINGES	EQPRM	Under Init	PAY LESS-001	POHC MED3	POHC3000000000000001
POHC5	ADMISSION CHARTS	NURSE	Under Init	MEDICAL-001	POHC MED3	POHC4000000000000001
POHC6	EXAM HIGH YEILD LIGHTS	EQPMT	Under Init	MEDICAL-001	HC SUPPLY	POHC5000000000000001

Report ID: INS9040
 Bus. Unit: US010--PHOENIX BIKE/OUTDOOR
 Item ID: ALL
 Status: Current: ALL Future: ALL

PeopleSoft Financials
 BASIC ITEM LISTING

Page No. 1
 Run Date 11/19/2003
 Run Time 14:25:37

SetID: SHARE
 Item ID: 10000 Long Sleeve Biking Jersey, Men's

General

Current Status 04/28/2000 Active
 Future Status
 Inventory Item Y
 Non-Owned Item N
 Consigned N
 Standard UOM EA
 Category ID 00009
 Item Group APPAREL
 Family COMMON
 Demand Priority
 Cost Profile Group 1003
 Cost Element 100
 Standard Cost Group
 Current Purchase Cost 31.05
 Default Actual Cost 0
 Average Purchase Price 15.5133
 Last Price Paid 25

Classifications

Template ID
 Grade
 Stock Type
 UPC Code UPC_CODE_001
 Hazard Code
 Intl Hazard ID
 Potency Code
 Item Type INV
 Commodity Code 850.00
 EU Commodity Code

Material Usage

Reusable N
 Disposable N
 Recyclable N
 Promise Option Perform ATP Reservations
 Usage Tracking Usage Not Tracked
 Reconcile N
 Charge Markup % 0
 Charge Markup Amt 0
 Charge Code

Shipping/Handling

Shelf Life (Days) 0
 Lot Control N
 Serial Control N
 Shipping Serial Control N
 Staged Date Control N
 Storage Rule
 MSDS ID
 Isolate Item N
 Storage Temp 0
 Storage Humidity 0
 Max Capacity 0
 Packing Code
 Std Pack UOM EA
 UOM Conversion Flag Convert
 Ship Via
 Oversized N
 Additional Handling N
 Tariff Code
 InterUnit Par Qty 0
 Export License Nbr
 ECCN
 Origin Country
 Region of Origin

Dimensions

Item Length 6 IN
 Item Height 2 IN
 Item Width 6 IN
 Item Weight 12 OZA
 Volume 72 CUI
 Item Size
 Item Color WHITE001

Physical Accounting

Utilization Type B
 Utilization Group CYCL
 Last Cycle Count 04/28/2000
 Last Physical Count

Replenishment

Not Included In Replenishment Y
 Include WIP Quantity N
 Replenish Calc Period (Days) 365
 Replenish Class
 Replenish Lead (Days) 0
 Reorder Point 0
 Reorder Qty 0
 Safety Stock 0
 Last Ann. Demand 0
 Economic Order Quantity 0
 Maximum Qty 0
 Average Order Qty 1
 Desired Stock-In Probability 95

Manufacturing

Repl Point 0
 Iss Mult 1
 Production Area
 Component Issue Method ISS
 Calc Comp Yield at Completion N
 Source Code Buy
 Phantom Item N
 Revision Control N
 Auto Revision N
 BOM Usage
 Master Routing Option
 Reference Routing Item 10000
 WIP RPL Mode
 WIP Min Qty 0
 Repl Max Qty 0
 WIP RPL Method
 WIP RPL Type
 WIP RPL Source
 Area
 Lev 1
 Lev 2
 Lev 3
 Lev 4
 Pull List
 One Time
 Inventory Location

Report ID: INS9040
Bus. Unit: US010--PHOENIX BIKE/OUTDOOR
Item ID: ALL
Status: Current: ALL Future: ALL

PeopleSoft Financials
BASIC ITEM LISTING

Page No. 2
Run Date 11/19/2003
Run Time 14:25:37

SetID: SHARE
Item ID: 10000 Long Sleeve Biking Jersey, Men's

Weight/Volume

UOM	Stocking Weight	Shipping Weight	Weight UOM	Stocking Volume	Shipping Volume	Volume UOM	Packing Code	Packaging Code	Container Type
EA	0.00	0.00		0.00	0.00		STD	STD	

Custom

ItmFldC10A	E003567890
ItmFldC10B	F003567890
ItmFldC10C	G003567890
ItmFldC10D	H003567890
ItmFldC1A	R
ItmFldC1B	Q
ItmFldC1C	P
ItmFldC1D	O
ItmFldC2	A3
ItmFldC30A	J00356789012345678901234567890
ItmFldC30B	K00356789012345678901234567890
ItmFldC30C	L00356789012345678901234567890
ItmFldC30D	M00356789012345678901234567890
ItmFldC4	B003
ItmFldC6	C00311
ItmFldC8	D0032222
ItmFldN12.3A	102111111111.111
ItmFldN12.3B	102222222222.222
ItmFldN12.3C	102333333333.333
ItmFldN12.3D	102444444444.444
ItmFldN15.0A	102555555555555
ItmFldN15.0B	102666666666666
ItmFldN15.0C	102777777777777
ItmFldN15.0D	102888888888888

Report ID: INS9040
 Bus. Unit: US010--PHOENIX BIKE/OUTDOOR
 Item ID: ALL
 Status: Current: ALL Future: ALL

PeopleSoft Financials
 BASIC ITEM LISTING

Page No. 3
 Run Date 11/19/2003
 Run Time 14:25:37

SetID: SHARE
 Item ID: 10002 Long Sleeve T-Shirt, Mens

General

Current Status 04/21/2000 Active
 Future Status
 Inventory Item Y
 Non-Owned Item N
 Consigned N
 Standard UOM EA
 Category ID 00009
 Item Group APPAREL
 Family COMMON
 Demand Priority
 Cost Profile Group 1003
 Cost Element 100
 Standard Cost Group
 Current Purchase Cost 9.65
 Default Actual Cost 0
 Average Purchase Price 7
 Last Price Paid 15

Classifications

Template ID
 Grade
 Stock Type
 UPC Code UPC_CODE_002
 Hazard Code
 Intl Hazard ID
 Potency Code
 Item Type INV
 Commodity Code 850.00
 EU Commodity Code

Material Usage

Reusable N
 Disposable N
 Recyclable N
 Promise Option
 Usage Tracking Usage Not Tracked
 Reconcile N
 Charge Markup % 0
 Charge Markup Amt 0
 Charge Code

Shipping/Handling

Shelf Life (Days) 0
 Lot Control N
 Serial Control N
 Shipping Serial Control N
 Staged Date Control N
 Storage Rule
 MSDS ID
 Isolate Item N
 Storage Temp 0
 Storage Humidity 0
 Max Capacity 0
 Packing Code
 Std Pack UOM EA
 UOM Conversion Flag Convert
 Ship Via
 Oversized N
 Additional Handling N
 Tariff Code
 InterUnit Par Qty 0
 Export License Nbr
 ECCN
 Origin Country
 Region of Origin

Dimensions

Item Length 6 IN
 Item Height 1 IN
 Item Width 6 IN
 Item Weight 12 OZA
 Volume 36 CUI
 Item Size
 Item Color WHITE001

Physical Accounting

Utilization Type B
 Utilization Group CYCL
 Last Cycle Count 04/21/2000
 Last Physical Count

Replenishment

Not Included In Replenishment Y
 Include WIP Quantity N
 Replenish Calc Period (Days) 365
 Replenish Class
 Replenish Lead (Days) 0
 Reorder Point 0
 Reorder Qty 0
 Safety Stock 0
 Last Ann. Demand 0
 Economic Order Quantity 0
 Maximum Qty 0
 Average Order Qty 1
 Desired Stock-In Probability 95

Manufacturing

Repl Point 0
 Iss Mult 1
 Production Area
 Component Issue Method ISS
 Calc Comp Yield at Completion N
 Source Code Buy
 Phantom Item N
 Revision Control N
 Auto Revision N
 BOM Usage
 Master Routing Option
 Reference Routing Item 10002
 WIP RPL Mode
 WIP Min Qty 0
 Repl Max Qty 0
 WIP RPL Method
 WIP RPL Type
 WIP RPL Source
 Area
 Lev 1
 Lev 2
 Lev 3
 Lev 4
 Pull List
 One Time
 Inventory Location

Report ID: POCNT500

Setid: SHARE

Manufacturer ID: LMMAN1

GPO ID: LMGPOID1

GPO Contract Number: LM-GPOIDCONTRACT-1

Manufacturer Currency: USD

PeopleSoft Financials

GPO PRICE COMPARISON

Page 1 of 1

Run Date 07/31/2001

Run Time 12:36:48

DISTRIBUTORS

Priority	Distributor ID	Name	Markup %
1	SCM0000001	BIKE SHOP	10
2	USA0000001	Bay Area Electric	20

Category: All Items

Item	Description	UOM	Mfg Price	Distributor ID	Distributor Price	Actual Markup %
100005	VALID ITEM	EA	4000.0000	SCM0000001	4400.0000	10.0000
				USA0000001	4800.0000	20.0000

Report ID: POCNT510
Set ID: SHARE
GPO: LMGPOID1
GPO Contract Number: LM-GPOIDCONTRACT-1
Manufacturer ID: LMMAN1

PeopleSoft Financials
GPO MANUFACTURER PURCHASES - NO DISTRIBUTOR MARKUP

Contract Begin Date: 01/01/2000
Contract End Date: 01/01/2005
Currency: USD

Page 1 of 1
Run Date 07/31/2001
Run Time 12:39:11

Category: 00001 ALLITEMS

Item	Description	Distributor	Mfr Item	Qty Purchased	UOM	Amount
100005	VALID ITEM	SCM0000001	LMMFG1ITEM13	1000.0000	EA	4000000.0000
				Distributor Total:		4000000.0000
				Category Total:		4000000.0000
				GPO Contract Total:		4000000.0000

Report ID: POCNT515

PeopleSoft Financials
GPO DISTRIBUTOR COMMITMENT

Page 1 of 1
Run Date 07/31/2001
Run Time 12:38:17

SetID: SHARE

Manufacturer ID: LMMAN1

GPO ID: LMGPOID1 **LMGPOID1**

GPO Contract Number: LM-GPOIDCONTRACT-1

GPO Currency: USD

Contract Begin Date: 01/01/2000

Contract End Date: 01/01/2005

DISTRIBUTOR **Distributor SetID:** SHARE

Distributor ID: SCM0000001 BIKE SHOP

Distributor Currency: USD

Distributor Contract:

Item	Description	Category	Mfg Item	Qty Purchased	UOM	Amount
100005	VALID ITEM	All Items	LMMFG1ITEM13	1000.0000	EA	4000000.0000
						Category Total: 4000000.0000
						Distributor Total: 4000000.0000
						GPO Contract Total: 4000000.0000

Report ID: POCNT520

PeopleSoft Financials
GPO PURCHASES REPORT

Page 1 of 1
Run Date 07/31/2001
Run Time 12:39:51

SetID: SHARE
GPO: LMGPOID1

Manufacturer: LMMAN1 LMMAN1
GPO Contract Number: LM-GPOIDCONTRACT-1

Contract Begin Date: 01/01/2000

Currency: USD
Contract End Date: 01/01/2005

Category	Amount
ALLITEMS	4000000.00
GPO Contract Total:	4000000.00
Manufacturer Total:	4000000.00
GPO Total:	4000000.00