



PeopleSoft Supply Chain Management Integration 8.8 PeopleBook

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PeopleSoft Supply Chain Management Integration 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)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading "See Also" or on a separate line preceded by the word <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	<p>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.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p>
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	
	<i>Using PeopleSoft Applications</i>
	<i>PeopleSoft Process Scheduler</i>

Preface

This preface discusses:

- PeopleSoft application fundamentals.
- Common elements in this PeopleBook.
- Pages with deferred processing.

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

PeopleSoft Application Fundamentals

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

The following companion PeopleBooks apply specifically to PeopleSoft Working with Third-Party Applications.

- *PeopleSoft Application Fundamentals for FIN, ESA, and SCM PeopleBook*
- *PeopleTools PeopleBook: PeopleSoft Integration Broker*
- *PeopleSoft Enterprise Components PeopleBook*

Common Elements Used in This PeopleBook

As of Date	The first date for which a report or process includes data.
BU or Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Freeflow text up to 256 characters.
Short Description	Freeflow text up to 15 characters.
Effective Date	Date which a table row becomes effective; the date that an action begins. For example, if you want to close 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 and batch processes that use the information use the current row.

See PeopleTools PeopleBook: Using PeopleSoft Applications

Language or Language Code

The language of the field labels and report headings of reports to print. The filed values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.

Process Frequency

Designates the appropriate frequency to process:

Once: executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to *Don't Run*.

Always Executes: executes the request every time the batch process runs.

Don't Run: Ignores the request when the batch process runs.

Process Monitor

View the status of submitted process requests.

See PeopleTools PeopleBook: PeopleSoft Process Scheduler

Report ID

The report identifier.

Report Manager

View report content, check the status of a report, and see detailed messages.

See PeopleTools PeopleBook: PeopleSoft Process Scheduler

Run Control ID

A request identification that represents a set of selection criteria for a report or process.

Run

Specify the location where a process or job runs and the process output format.

Status

Check the progress of a report or process. A valid status is *Posted*, *Not Posted*, *Generated*, *Processing*, or *Scheduled*.

User ID

The system identifier for the individual who generates a transactions.

Instance or Prcs Instance

The number that represents where the request is in the queue.

See Also

PeopleTools PeopleBook: PeopleSoft Application Designer

PART 1

Getting Started

Chapter 1

Getting Started with SCM Integration

CHAPTER 1

Getting Started with SCM Integration

This section discusses SCM integration documentation and implementations.

Navigating PeopleSoft SCM Integration Documentation

If you are using integration with your PeopleSoft Supply Chain Management applications, please refer to this chapter to find the information you need.

PeopleSoft SCM provides powerful integration technology. You can integrate to specific application vendors or share transaction or definitional data directly with suppliers or customers.

We have information organized for functional users and technical implementers on how to set up and use enterprise integration points (EIPs) in PeopleSoft Supply Chain Management.

Integration Information Flow

When you're learning about EIPs, it is suggested that you follow the following order of information:

Step	Documentation	Type of Information	Primary Audience
Learning what EIPs are delivered with your application.	Application PeopleBooks	Functional descriptions of EIPs	Power users and managers
A high level understanding of the EIP architecture, and the types of technologies for which SCM delivers EIPs.	<i>PeopleSoft SCM Integration PeopleBook</i>	EIP overview information Descriptions of EIP groups integrating to specific technologies (warehouse management systems, electronic data collection, and so forth)	Power users and managers
How to set up EIPs and understand the delivered design patterns.	<i>PeopleSoft Enterprise Components PeopleBook</i>	EIP setup information Design pattern descriptions	Functional and technical implementers
Mapping EIP data	EIP Catalog	Technical details for each EIP	Functional and technical implementers
Creating or customizing EIPs	<i>PeopleSoft Integration Broker PeopleBook</i>	Information on using this technology to create your own EIPs	Functional and technical implementers

Power Users and Managers

If you are looking for information on which EIPs to use and what they can do for you, you can find overview information as follows.

Area	Location
Overview of EIPs and integration technology	See Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” Understanding PeopleSoft SCM Integration Points, page 9. See <i>PeopleSoft Enterprise Components</i> , “Understanding Enterprise Integration”. See <i>PeopleSoft Enterprise Components</i> , “Understanding Enterprise Integration Points”.
Functional description of individual EIPs.	The respective application PeopleBook.
EDI information	See Part 3, “Using Electronic Data Interchange,” page 101.
Warehouse Management Systems information	See Part 4, “Integrating to Warehouse Management Systems,” page 137.
Healthcare application information	See Part 5, “Integrating to Healthcare Applications,” page 159.
Electronic data collection information	See Part 6, “Integrating to Electronic Data Collection Systems,” page 179.
Sales and Use Tax information	See Part 10, “Integrating to Sales and Use Tax Applications,” page 281.
Transportation Management information	See Part 7, “Integrating with Transportation Management Systems,” page 239.

Functional and Technical Implementers

Resources for technical information are the Enterprise Integration section of the PeopleSoft Enterprise Components PeopleBook, PeopleSoft Integration Broker PeopleBook and Enterprise Integration Repository. There are also specific overview sections and examples in the PeopleSoft SCM Integration PeopleBook

Area	Location
EIP setup information	See <i>PeopleSoft Enterprise Components</i> , “Activating Messaging EIPs”. See <i>PeopleSoft Enterprise Components</i> , “Assigning Publishing Rules”. See <i>PeopleSoft Enterprise Components</i> , “Using the Effective Date Publish Utility”. See <i>PeopleSoft Enterprise Components</i> , “Using the Flat File Utility”.

Area	Location
Chunking information	<p>See Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” Setting Up Chunking, page 57.</p> <p>See <i>PeopleSoft Enterprise Components</i>, “Assigning Publishing Rules”.</p>
EIP processing Information	<p>See Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” Processing Inbound Application Message Transactions, page 13.</p> <p>See Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” Processing Inbound Transactions, page 34.</p> <p>See Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” Processing Outbound Application Message Transactions, page 39.</p> <p>The respective application PeopleBook.</p> <p>See Chapter 3, “SCM EIP Examples,” page 63.</p>
Inbound error handling	<p>See Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” Processing Inbound Transactions, page 34.</p> <p>See <i>PeopleSoft Enterprise Components</i>, “Using the Error Handling Utility”.</p>
General technical information	<i>PeopleTools PeopleBook: PeopleSoft Integration Broker</i>
Technical details for each EIP	See http://www.peoplesoft.com/corp/en/products/technology/oif/eip_catalog.jsp
Inbound EIP (subscribe) specific information	<p>See Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” Processing Inbound Transactions, page 34.</p> <p>See <i>PeopleSoft Enterprise Components</i>, “Using the Error Handling Utility”.</p> <p>See <i>PeopleSoft Enterprise Components</i>, “Using the Flat File Utility”.</p>
Outbound EIP (publish) specific information	<p>See <i>PeopleSoft Enterprise Components</i>, “Assigning Publishing Rules”.</p> <p>See <i>PeopleSoft Enterprise Components</i>, “Using the Effective Date Publish Utility”.</p> <p>See <i>PeopleSoft Enterprise Components</i>, “Using the XML Schema Utility”.</p>

Integration Implementation

There are no table-loading implementation steps for integrations. In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Application Fundamentals for Fin, SCM, and ESA 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

PART 2

Understanding SCM Integration

Chapter 2

Managing PeopleSoft Supply Chain Management Integration Points

Chapter 3

SCM EIP Examples

CHAPTER 2

Managing PeopleSoft Supply Chain Management Integration Points

This chapter provides an overview of PeopleSoft Supply Chain Management (PeopleSoft SCM) integration points and discusses how to:

- Process PeopleSoft Business Interlinks transactions.
- Process inbound application message transactions.
- Process inbound transactions.
- Process outbound application message transactions.
- Set up chunking.
- Publish outbound messages.

Understanding PeopleSoft SCM Integration Points

PeopleSoft SCM integration points enable you to:

- Send or publish a message to a third-party system.
- Accept or subscribe to messages from third-party systems.
- Send a synchronous request and reply transaction to a third-party system for processing.

Processing PeopleSoft Business Interlinks Transactions

Sometimes PeopleSoft SCM needs to call an external system vendor's application to request information. This information must be provided in a real-time, synchronous mode. The PeopleSoft application waits for the answer from the other application in real time, before the PeopleSoft application can continue processing.

These transactions use PeopleSoft Business Interlinks definitions to specify the data passed to this external system as well as to define the output to be received from the external system. The data that is passed from the interlink object is interpreted by an interlink plug-in, which then contacts the external system, passes the data in the correct form, retrieves the data, and then passes it, in the correct form, back to the interlink object:

EIP	Object Name	PeopleSoft SCM Product	Reference
Credit Card Authorize, Bill and Credit	CREDITCARD_TRANSACTION	PeopleSoft Billing and PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , "Processing Credit Cards".
Direct Connect	PV_CXML1_POSR	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , "Integrating with Direct Connect Suppliers".
Direct Connect	PV_CXML1_POOM	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , "Integrating with Direct Connect Suppliers".
Direct Connect	PV_CXML1_ORDER	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , "Integrating with Direct Connect Suppliers".
Freight Calculation	FREIGHT_CALC	PeopleSoft Inventory and PeopleSoft Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , "Setting Up Transportation Lead Times and Freight Charges," Using a Third-Party Freight Application to Calculate Freight.
Freight Cancellation	FREIGHT_CANCEL	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , "Shipping Inventory," Freight Charges.
Get PO IUT	GET_PO_IUT	PeopleSoft Inventory, PeopleSoft Purchasing	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , "Order Fulfillment Processing," Purchase Order and InterUnit Transfer Information Business Interlink.

EIP	Object Name	PeopleSoft SCM Product	Reference
Item Balance	IN_ITEM_BALANCES	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Inquiring and Reporting About On-Hand Stock,” Providing Inventory Balances to Third-Party Systems.
Marketplace Integration	PV_MS_PODISPATCH	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Integrating with Direct Connect Suppliers”.
Order Status	OM_ORDER_STATUS	PeopleSoft Order Management	<i>PeopleSoft CRM Sales Force Automation PeopleBook</i>
Product Availability	OM_PROD_AVAILABILITY	PeopleSoft Order Management	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Inquiring and Reporting About On-Hand Stock,” Providing Item Availability Checks to Third-Party Systems.
Tax Calculation	TAXWARE_CALCTAX	PeopleSoft Billing and PeopleSoft Order Management	See Chapter 15, “Calculating Sales and Use Tax in Supply Chain Management,” page 283.
Tax Calculation	VERTEX_CALCTAX	PeopleSoft Billing and PeopleSoft Order Management	See Chapter 15, “Calculating Sales and Use Tax in Supply Chain Management,” page 283.

EIP	Object Name	PeopleSoft SCM Product	Reference
Tax Geocode	TAXWARE_GEOCODES	PeopleSoft Billing and PeopleSoft Order Management	<p>See Chapter 15, “Calculating Sales and Use Tax in Supply Chain Management,” Associating Address Information With Geocodes, page 287.</p> <p>See Appendix A, “Installing Third-Party Tax Applications,” page 297.</p> <p>See Appendix C, “Installing Taxware,” page 307.</p>
Tax Geocode	VERTEX_GEOCODES	PeopleSoft Billing and PeopleSoft Order Management	<p>See Chapter 15, “Calculating Sales and Use Tax in Supply Chain Management,” Associating Address Information With Geocodes, page 287.</p> <p>See Appendix A, “Installing Third-Party Tax Applications,” page 297.</p> <p>See Appendix B, “Installing Vertex,” page 303.</p>

See Also

PeopleTools PeopleBook: PeopleSoft Business Interlinks for Application Developers

PeopleTools PeopleBook: PeopleSoft Business Interlinks for Design-Time Plug-in Programming

PeopleTools PeopleBook: PeopleSoft Business Interlinks for Runtime Plug-in Programming

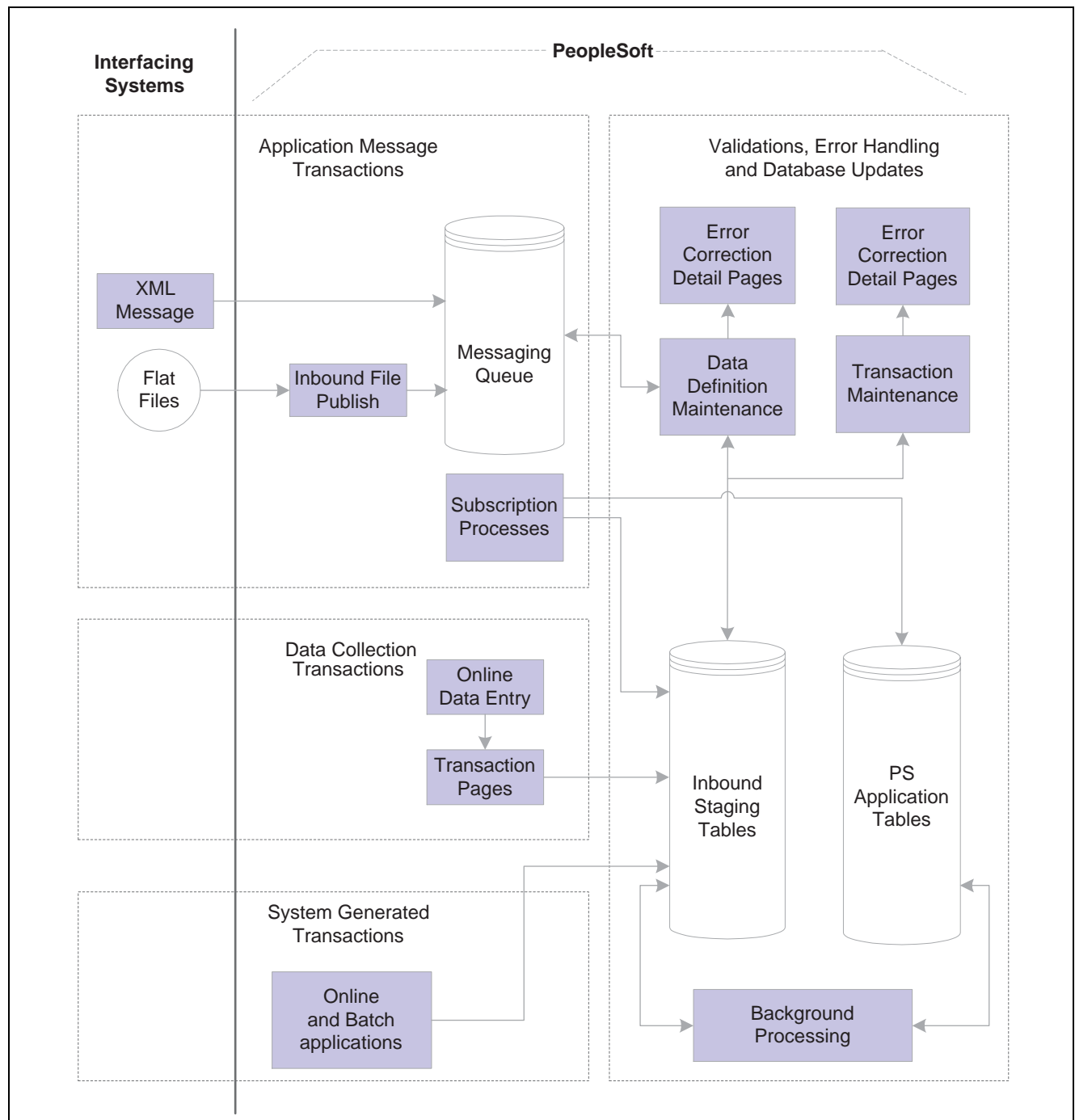
PeopleTools PeopleBook: PeopleSoft Business Interlinks for XML

Processing Inbound Application Message Transactions

Third-party systems can send PeopleSoft applications information using a number of integration points established throughout the system. Depending on the application, various technologies provide multiple options for interacting with the PeopleSoft system. Each option provides audit trails, validations, and error handling to insure that data integrity is maintained within the PeopleSoft database.

Understanding the Inbound Transaction Architecture

Depending on the requirements of the interacting system and the integration point within the PeopleSoft system, various technologies are used to receive transactions into the PeopleSoft system:



Inbound transaction flow

Application Message Based Transaction

The PeopleSoft Application Messaging functionality provides a method for asynchronous communications between external systems and PeopleSoft applications using industry standard XML-formatted messages. XML messages are automatically loaded into the PeopleSoft system by using subscription processes that are unique to each message type. You can view all transactions in the transaction log and access the detail pages that enable you to correct transaction errors. Most subscription processes load message information into staging tables where background programs validate and process individual transactions within the message.

The Inbound File Publish utility, which utilizes the File Layout Object tool, may also be used to automatically convert flat file input to XML-based application messages. Examples are provided showing how to use this utility, as PeopleSoft SCM electronic data interchange (EDI) transactions have been set up to take advantage of this feature.

Electronic Data Collection Transaction Pages

PeopleSoft SCM includes transaction pages for many of the inbound transactions. The transaction pages are designed for quick data entry. There are minimal edits, and no application database updates are performed in these pages as the background programs scanning the transaction logs handle detail processing. The transaction pages provide a method of quick data entry for much of the transaction-based information processed by the system. You can enter the transactions directly onto the page, or attach a wedge and bar code reader to take advantage of bar code scanning benefits.

System-Generated Transactions

Several transactions that are fed in the transaction log are generated from internal application programs. By generating these transactions, applications push heavy processing functions to a background mode.

Validations, Error Handling, and Database Updates

Most inbound transactions, no matter which technology delivers them to the PeopleSoft system, are loaded into staging tables, where they are validated by background routines scanning these transaction logs awaiting incoming work. If errors are found, the transaction status in the transaction log is changed to *Error*, and rows are inserted into error tables for each error message.

Error messages appear on the Transaction Maintenance page for transactional type data such as, inventory adjustments and purchase order receipts. For definitional type data such as item master and bills of material, the Data Definition page is used to review and correct the erroneous information.

Once you have corrected the information and saved the page, the transaction is ready to be reprocessed.

Some transactions provide functionality to immediately validate and update application tables from subscription processes. For example, the Consumer and Par Location Count transactions both attempt to update the application tables, but if errors are found, the transactions write the data to the error tables so that corrections can be made.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Broker

PeopleSoft Enterprise Components, “Enterprise Integration”

Chapter 4, “Using Electronic Data Interchange Messaging,” page 103

Chapter 10, “Using an Electronic Data Collection System,” page 185

PeopleSoft Manufacturing 8.8 PeopleBook, “Issuing Material to Production,” Issuing Material Using Electronic Data Collection

PeopleSoft Manufacturing 8.8 PeopleBook, “Issuing Material to Production,” Processing Picking Plans Using Electronic Data Collection

PeopleSoft Manufacturing 8.8 PeopleBook, “Issuing Material to Production,” Processing Kit Issues and Returns Using Electronic Data Collection

PeopleSoft Manufacturing 8.8 PeopleBook, “Recording Completions and Scrap Using Electronic Data Collection,” Recording Completions Using Electronic Data Collection

PeopleSoft Manufacturing 8.8 PeopleBook, “Recording Completions and Scrap Using Electronic Data Collection,” Processing Other Electronic Data Collection Transactions

Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” Using Transaction Maintenance, page 36

Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” Using Data Definition Maintenance, page 37

Using Inbound Transactions

PeopleSoft SCM provides these inbound transactions:

EIP	Object Name	PeopleSoft SCM Product	Reference
Actual Hours	PRODUCTION_ ACTUAL_HOURS	PeopleSoft Manufacturing	See <i>PeopleSoft Manufacturing 8.8 PeopleBook</i> , “Completing Operations and Recording Scrap,” Recording and Viewing Actual Machine and Labor Hours.
Advanced Shipping Receipt	ADVANCED_ SHIPPING_RECEIPT	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Receiving Shipments”.

EIP	Object Name	PeopleSoft SCM Product	Reference
Bill of Material	BOM_SYNC	PeopleSoft Manufacturing, PeopleSoft Engineering	See <i>PeopleSoft Manufacturing 8.8 PeopleBook</i> , “Understanding PeopleSoft Bills of Material and Routings,” Importing Bills of Material from External Sources.
Bill of Material	PDX_MSG	PeopleSoft Manufacturing	See <i>PeopleSoft Manufacturing 8.8 PeopleBook</i> , “Using Serial Genealogy in PeopleSoft Manufacturing”.
Carrier/Shipping Method	CARRIER_FULLSYNC	PeopleSoft Order Management	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining Financials and Supply Chain Management Common Definitions,” Setting Up Freight Carriers.
Carrier/Shipping Method	CARRIER_FULLSYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining Financials and Supply Chain Management Common Definitions,” Setting Up Freight Carriers.

EIP	Object Name	PeopleSoft SCM Product	Reference
Carrier/Shipping Method	CARRIER_SYNC	PeopleSoft Order Management	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining Financials and Supply Chain Management Common Definitions,” Setting Up Freight Carriers.
Carrier/Shipping Method	CARRIER_SYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining Financials and Supply Chain Management Common Definitions,” Setting Up Freight Carriers.
Consumer	CONSUMER_SYNC	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Tracking Material Usage,” Importing Consumer Information with the Consumer EIP.
Contact	CONTACT_FULLSYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Contacts,” Setting Up Contacts.
Contact	CONTACT_FULLSYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Contacts,” Setting Up Contacts.

EIP	Object Name	PeopleSoft SCM Product	Reference
Contact	CONTACTLSYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Contacts,” Setting Up Contacts.
Credit Card Data	CORPORATE_CARD_DATA_FULL_SYNC	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Managing Procurement Cards”.
Credit Card Data	CORPORATE_CARD_DATA_SYNC	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Managing Procurement Cards”.
Credit Card Data	CORPORATE_CARD_FULL_SYNC	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Managing Procurement Cards”.
Credit Card Data	CORPORATE_CARD_SYNC	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Managing Procurement Cards”.

EIP	Object Name	PeopleSoft SCM Product	Reference
Customer	CUSTOMER_FULLSYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Adding General Customer Information.
Customer	CUSTOMER_FULLSYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Adding General Customer Information.
Customer	CUSTOMER_SYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Adding General Customer Information.
Customer Contact	CONTACT_FULLSYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Contacts,” Setting Up Contacts.
Customer Group	CUSTOMER_GROUP_FULL_SYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Adding General Customer Information.
Customer Group	CUSTOMER_GROUP_SYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Adding General Customer Information.

EIP	Object Name	PeopleSoft SCM Product	Reference
Customer Group	CUSTOMER_GROUP_FULLSYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Adding General Customer Information.
Customer Group	CUSTOMER_GROUP_SYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Adding General Customer Information.
ePro Direct Connect	PV_ORDER_RESP	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Integrating with Direct Connect Suppliers,” Setting Up Common Components for Direct Connect.
ePro Order	PV_ORDER_CXML	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Integrating with Direct Connect Suppliers,” Setting Up Common Components for Direct Connect.
ePro Order Response	PV_MS_RESP_MSG	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Integrating with Direct Connect Suppliers,” Linking to Suppliers Using PunchOut.
ePro Order Response	PV_MS_XCBL_POR	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Integrating with Direct Connect Suppliers,” Setting Up Common Components for Direct Connect.

EIP	Object Name	PeopleSoft SCM Product	Reference
GPO Item Price List	ITEM_MFG_GPO_LOAD	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”. See <i>PeopleSoft Managing Items 8.8 PeopleBook</i> .
Interunit Receipt	INTERUNIT_RECEIPT	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Receiving and Putting Away Stock,” Staging Interunit Transfers Using an Electronic Data Collection System.
Inventory Adjustment	INVENTORY_ADJUSTMENT	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Making Stock Quantity Adjustments and Transfers Within the Business Unit,” Making Adjustments Using the Inventory Adjustments EIP.
Inventory by Location	INVENTORY_BY_LOC_REQ INVENTORY_BY_LOC_RSP	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Inquiring and Reporting About On-Hand Stock,” Providing Inventory Balances to Third-Party Systems.
Inventory Front End Shipping	INVENTORY_FRONT_END_SHIPPING	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Utilizing the Fulfillment Engine,” Setting up the Fulfillment Engine EIPs.
Inventory Picking	INVENTORY_PICKING	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Picking Inventory,” Entering Picking Feedback Using an Electronic Data Collection System.

EIP	Object Name	PeopleSoft SCM Product	Reference
Inventory Putaway	INVENTORY_ PUTAWAY	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Receiving and Putting Away Stock,” Entering Stockroom Feedback Using an Electronic Data Collection System.
Inventory Reservation	INVENTORY_ RESERVATION	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Utilizing the Fulfillment Engine,” Setting up the Fulfillment Engine EIPs.
Inventory Shipping	INVENTORY_ SHIPPING	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Utilizing the Fulfillment Engine,” Setting up the Fulfillment Engine EIPs.
Inventory Shipping Container	INVENTORY_SHIP_ CNTR	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Packing Orders for Shipment,” Working With Shipping Containers and Shipping Serial IDs Using an Electronic Data Collection System.
Inventory Shipping Serial ID	INVENTORY_SHIP_ SERIAL	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Packing Orders for Shipment,” Working With Shipping Containers and Shipping Serial IDs Using an Electronic Data Collection System.
Inventory Transfer	INVENTORY_ TRANSFER	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Making Stock Quantity Adjustments and Transfers Within the Business Unit,” Transferring Materials Using the Inventory Transfers EIP.

EIP	Object Name	PeopleSoft SCM Product	Reference
Item Master	IN_MST_ITM_XLS	PeopleSoft Inventory	See <i>PeopleSoft Managing Items 8.8 PeopleBook</i> , “Loading Items,” Understanding Item Loading.
Item Master	ITEM_FULLSYNC	PeopleSoft Inventory	See <i>PeopleSoft Managing Items 8.8 PeopleBook</i> , “Loading Items,” Understanding Item Price List and Item Master Enterprise Integration Points.
Item Master	ITEM_FULLSYNC_EFF	PeopleSoft Inventory	See <i>PeopleSoft Managing Items 8.8 PeopleBook</i> , “Loading Items,” Understanding Item Price List and Item Master Enterprise Integration Points.
Item Master	ITEM_SYNC	PeopleSoft Inventory	See <i>PeopleSoft Managing Items 8.8 PeopleBook</i> , “Loading Items,” Understanding Item Price List and Item Master Enterprise Integration Points.
Item Master	ITEM_SYNC_EFF	PeopleSoft Inventory	See <i>PeopleSoft Managing Items 8.8 PeopleBook</i> , “Loading Items,” Understanding Item Price List and Item Master Enterprise Integration Points.
Item Price List	ITEM_PRICELIST	PeopleSoft Inventory and PeopleSoft Purchasing	See <i>PeopleSoft Managing Items 8.8 PeopleBook</i> , “Loading Items,” Understanding Item Price List and Item Master Enterprise Integration Points.

EIP	Object Name	PeopleSoft SCM Product	Reference
Kanban ID Import	PRODUCTION_REPLENISHMENT_REQUEST	PeopleSoft Flow Production Management	See <i>PeopleSoft Flow Production 8.8 PeopleBook</i> , “Maintaining Kanban Cards and Replenishment Requests” and <i>PeopleSoft Flow Production 8.8 PeopleBook</i> , “Maintaining Kanban Cards and Replenishment Requests”.
Par Location Count	PAR_LOCATION_COUNT	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Managing Par Inventory,” Uploading Count Results Using the Par Location Count EIP.
Physical Inventory	PHYSICAL_INVENTORY	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Performing Physical Accounting,” Collecting Counting Data using the Physical Inventory EIP.
Arbitration Plan	ARBITRATION_PLAN_FULLSYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Arbitration Plan	ARBITRATION_PLAN_SYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price List	LISTPRICEFULLSYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price List	PRICE_LIST_DETAIL_FULLSYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.

EIP	Object Name	PeopleSoft SCM Product	Reference
Price List	PRICE_LIST_DETAIL_SYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price List	PRICE_LIST_FULLSYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price List	PRICE_LIST_HEADER_FULLSYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price List	PRICE_LIST_HEADER_SYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price List	PRICE_LIST_SYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price Rule	PRICE_RULE_DATA_FULLSYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price Rule	PRICE_RULE_KEYS_FULLSYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price Rule	PRICE_RULE_DATA_SYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.

EIP	Object Name	PeopleSoft SCM Product	Reference
Procurement Cards	PROCUREMENT_CARD_LOAD	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”. Managing Procurement Cards See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Managing Procurement Cards”.
Product	PRODUCT_SYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Setting Up Products,” Using Product Messages.
Product	PRODUCT_SYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Setting Up Products,” Using Product Messages.
Product	PRODUCT_FULLSYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Setting Up Products,” Using Product Messages.
Product	PRODUCT_FULLSYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Setting Up Products,” Using Product Messages.
Product Configurator Data Sync	CP_CONSTANT_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.

EIP	Object Name	PeopleSoft SCM Product	Reference
Product Configurator Data Sync	CP_CONSTRAINT_ FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_EXPRESSION_ FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_GLOBAL_ FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_INTRN_VAR_ FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_MATRIX_ FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_MESSAGE_ FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_MULTOP_ FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.

EIP	Object Name	PeopleSoft SCM Product	Reference
Product Configurator Data Sync	CP_OPTION_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_PRINTCD_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_RULE_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_SECONDARY_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_TEMPLATE_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_TREE_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_VALUE_LIST_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.

EIP	Object Name	PeopleSoft SCM Product	Reference
Product Group	PRODUCT_GROUP_SYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Setting Up Products,” Using Product Messages.
Product Group	PRODUCT_GROUP_SYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Setting Up Products,” Using Product Messages.
Product Group	PRODUCT_GROUP_FULLSYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Setting Up Products,” Using Product Messages.
Product Group	PRODUCT_GROUP_FULLSYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Setting Up Products,” Using Product Messages.
Production Completions	PRODUCTION_ORDER_COMPLETION	PeopleSoft Manufacturing	See <i>PeopleSoft Manufacturing 8.8 PeopleBook</i> , “Recording Completions and Scrap Using Electronic Data Collection,” Processing Electronic Data Collection Completions Transactions.
Production Order Issue	PRODUCTION_ORDER_ISSUE	PeopleSoft Manufacturing	See <i>PeopleSoft Manufacturing 8.8 PeopleBook</i> , “Recording Completions and Scrap Using Electronic Data Collection”.
Production Order Sync	PRODORDERSYNC	PeopleSoft Manufacturing	See <i>PeopleSoft Manufacturing 8.8 PeopleBook</i> , “Maintaining Production Orders and Production Schedules”.

EIP	Object Name	PeopleSoft SCM Product	Reference
Production Picking	PRODUCTION_PICKING	PeopleSoft Manufacturing	See <i>PeopleSoft Manufacturing 8.8 PeopleBook</i> , “Issuing Material to Production,” Processing Picking Plans Using Electronic Data Collection.
Production Serial Association	PRODUCTION_SERIAL_ASSOCIATION	PeopleSoft Manufacturing	See <i>PeopleSoft Manufacturing 8.8 PeopleBook</i> , “Using Serial Genealogy in PeopleSoft Manufacturing”.
Purchase Order Acknowledgement, PO Change Acknowledgement	PURCHASE_ORDER_ACKNOWLEDGEMENT	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.
Purchase Order Receipt	PURCHASE_ORDER_RECEIPT	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.
Purchase Order Requisition	PURCHASE_REQUISITION_LOAD	PeopleSoft Purchasing	See Chapter 7, “Integrating With a Third-Party Point-of-Use Supplier System,” page 161 . See Chapter 8, “Integrating With a Third-Party Surgical Resource Software Application,” page 169 .
Purchase Order Requisition	PURCHASE_REQUISITION_LOAD_CRM	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.
Quality Data Submit	QUALITY_DATA_SUBMIT	PeopleSoft Quality	See <i>PeopleSoft Quality 8.8 PeopleBook</i> , “Integrating With Third-Party Applications”.

EIP	Object Name	PeopleSoft SCM Product	Reference
Replenishment Request	PRODUCTION_ REPLENISHMENT_ REQ	PeopleSoft Flow Production	See <i>PeopleSoft Flow Production 8.8 PeopleBook</i> , “Maintaining Kanban Cards and Replenishment Requests”.
Request for Quote	PO_REQUEST_FOR_ QUOTE_RESPONSE	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.
Returned Material Authorization	RMA_LOAD	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Receiving and Putting Away Stock,” Staging Interunit Transfer and RMA Receipts.
Sales Order	SALES_ORDER_LOAD	PeopleSoft Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages,” Using Inbound Sales Order and Quotation Messages.
Sales Order Change	SALES_ORDER_ CHANGE_LOAD	PeopleSoft Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages,” Sales Order Change (860) and Sales Order Change Notice (865).
Sales Order Change	SALES_CRM_ORDER_ CHANGE_LOAD	PeopleSoft Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages,” Sales Order Change (860) and Sales Order Change Notice (865).

EIP	Object Name	PeopleSoft SCM Product	Reference
Sales Order Load	SALES_CRM_ORDER_LOAD	PeopleSoft Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages,” Using Inbound Sales Order and Quotation Messages.
Sales Quote	SALES_QUOTE_LOAD	PeopleSoft Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages,” Using Inbound Sales Order and Quotation Messages.
Sales Quote Load	SALES_CRM_QUOTE_LOAD	PeopleSoft Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages,” Using Inbound Sales Order and Quotation Messages.
Shipping Notification	SHIPPING_NOTIFICATION	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Order Fulfillment Processing,” Understanding Enterprise Integration Points for Fulfillment Transactions.
Standard Note	STD_NOTE_SYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Additional Customer Information,” Setting Up Standard Notes.
Standard Note	STD_NOTE_SYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Additional Customer Information,” Setting Up Standard Notes.

EIP	Object Name	PeopleSoft SCM Product	Reference
Standard Note	STD_NOTE_ FULLSYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Additional Customer Information,” Setting Up Standard Notes.
Standard Note	STD_NOTE_ FULLSYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Additional Customer Information,” Setting Up Standard Notes.
Supply Chain Planning EIPs	SPL_OPT_TBLS_SYNC	PeopleSoft Supply Planning	See <i>PeopleSoft 8.8 SP1 Supply Planning Multisite Material Planner and PeopleSoft 8.8 SP1 Supply Planning Advanced Multisite Planner PeopleBook</i>
Transportation Notification	TMS_LOAD_ NOTIFICATION TMS_LOAD_ NOTIFICATION_RESP	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Order Fulfillment Processing,” Transportation Management System EIPs.
Workforce Data	WORKFORCE_SYNC	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Integrating with PeopleSoft HRMS”.
Workforce Data	WORKFORCE_ FULLSYNC	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Integrating with PeopleSoft HRMS”.

Processing Inbound Transactions

This section discusses how to:

- Set up electronic data collection defaults.
- Use transaction maintenance.
- Use data definition maintenance.
- Purge transactions.

Pages Used to Process Inbound Transactions

Page Name	Object Name	Navigation	Usage
Data Collection Setup	BCT_SETUP_FS	Data Exchanges, Setup, Data Collection, Data Collection Setup	Set up electronic data collection defaults.
Transaction Maintenance	BCT_CTL_UPD	Data Exchanges, Transaction Error Handling, Maintain Transactions, Transaction Maintenance	View all electronic transactions in the transaction log and access the detail pages that enable you to correct transaction errors.
Data Def Maint	EO_EIP_CTL_MAINT	Data Exchanges, Transaction Error Handling, Maintain Data Definitions, Data Def Maint	View data detail or correct errors for subscribe messages that contain data rather than transactions.
Purge	BCT_INV_REQPURG	Data Exchanges, Process Transactions, Purge, Transactional Data, Purge	Initiate the Purge Application Engine process (IN_BCT_PURGE) that purges transactions for enterprise integration points (EIPs).

Setting Up Electronic Data Collection Defaults

To enter defaults for electronic data collection, use the Bar Code Transaction Setup component.

Access the Data Collection Setup page.

Transaction Number

The last transaction number used in the transaction log appears. The system uses the transaction number to automatically generate a unique number for each transaction added to the transaction log from the transaction pages. System-generated transactions also use this field.

History Options

Determines whether a history of the transactions is saved when you run the Purge process (INPYPURG) on the transactions in the transaction log.

Options are:

History for all Transactions: The system maintains a history of all transactions in the transaction log.

History only for Errors: The system maintains a history only for transactions that have errors or warnings.

No history will be maintained: The system doesn't maintain a history for any transactions in the transaction log.

Status of Records to Purge Determines which records the system purges when you run the Purge process.

Options are:

Complete: All rows for the transaction are either canceled or successfully processed.

Confirmed: Purges only rows set to a confirmed status. This entry should be selected only if you have modified the interacting system to set the status of transactions to confirmed after making sure that the PeopleSoft system has processed the transaction to a complete status.

File Suffix Used as the suffix for the file name of the label extraction file, when a format ID is not specified on the label generation page.

Note. If your interacting system is selecting *Complete* transactions to mark them as being ready to purge, the BCT_STATUS on BCT_CTL should be updated from 2 (complete) to 6 (confirmed).

See Also

[Chapter 10, “Using an Electronic Data Collection System,” Using Electronic Data Collection Transactions, page 187](#)

[Chapter 10, “Using an Electronic Data Collection System,” Purging Transactions, page 191](#)

[Chapter 10, “Using an Electronic Data Collection System,” Generating Labels, page 191](#)

Using Transaction Maintenance

Access the Transaction Maintenance page.

Transaction Maintenance							
*Unit: US001		Transaction: [Dropdown]		Status: [Dropdown]		Search	
Transaction Details							
Status	Source	[Buttons: Customize, Find, View All, First, 1 of 1, Last]					
EIP Control ID	Trans Code	Description	*Status	Error	Date/Time	User	From
300000000000001220000000001	0106	Receive by Kanban ID	Complete	0	10/28/2003 4:44PM	SAMPLE	Page

Transaction Maintenance page

All transactional-based information appears on this page. Detail pages for each transaction type, which are accessible from this page, provide error messages and transaction details that allow you to revise fields containing errors.

Click the EIP Control ID link to view the transaction line details for the transaction. The system displays the transaction code, which identifies the transaction type, and the transaction description.

You can modify the transaction status here or in the Transaction Maintenance Detail pages. The rules for changing a transaction status are:

Current Status	Change to Status
New	Complete (cancels all lines in the transaction).
Error	Complete (cancels all lines in the transaction). Reprocess.
Complete	Can't be changed.
In Process	Can't be changed.
Reprocess	Complete (cancels all lines in the transaction).
Incomplete	Can't be changed.

Using Data Definition Maintenance

Access the Data Def Maint (data definition maintenance) page.

All data definition transactions appear on this page. Detail pages for each transaction type, which are accessible from this page, provide error messages and transaction details that allow you to revise fields containing errors.

Some transactions are preloaded into staging tables while others remain in the Application Messaging Queue until they are successfully processed. Select Queue Based to see those residing in the Application Messaging Queue and Stage Table Status to see those that are in a stage table. If you are retrieving records by transaction, select one of these transaction types:

Transaction Type	Description
AP - 100	Retrieves vendor synchronization messages that have been entered into the system. To use the vendor synchronization message, you must have PeopleSoft Payables installed.
AP - 200	Retrieves vendor edit messages that have been entered into the system. To use the voucher edit message, you must have PeopleSoft Payables installed.
ASNIN	Retrieves advanced shipping receipt messages that have been entered into the system. To use the Advanced Shipping Receipt message, you must have PeopleSoft Purchasing installed.

Transaction Type	Description
BOM	Retrieves bills of material messages that have been received. To receive bills of material messages, you must have PeopleSoft Manufacturing installed.
CONSUMER	Retrieves consumer sync messages that have been received. To receive consumer sync messages, you must have PeopleSoft Inventory installed.
ITEM	Retrieves item loader and item sync messages that have been received. To receive item loader and item sync messages, you must have PeopleSoft Inventory, PeopleSoft eProcurement, or PeopleSoft Purchasing installed.
ITM_MFGGPO	Retrieves manufacturer group purchasing organization (GPO) item price list messages that have been received. To receive manufacturer GPO item price list messages, you must have PeopleSoft Purchasing or PeopleSoft Inventory installed.
PO	Retrieves purchase order messages that have been received. To receive inbound sales order (850) messages, you must have PeopleSoft Order Management installed.
POACK	Retrieves purchase order acknowledgement messages that have been received. To receive purchase order acknowledgement messages, you must have PeopleSoft Purchasing installed.
POCHG	Retrieves purchase order change messages that have been received. To receive sales order change (860) messages, you must have PeopleSoft Order Management installed.
PROCARD	Retrieves procurement card messages that have been received. To receive procurement card messages, you must have PeopleSoft Purchasing or PeopleSoft eProcurement installed.
PRODUCTMST	Retrieves product master messages that have been received. To receive product master messages, you must have PeopleSoft Order Management installed.
REQLOAD	Retrieves requisition loader messages that have been received. To receive requisition loader messages, you must have PeopleSoft Purchasing or PeopleSoft eProcurement installed.

Transaction Type	Description
RFQ	Retrieves request for quotation (RFQ) messages that have been received. To receive inbound request for quote (840) messages, you must have PeopleSoft Order Management and PeopleSoft Purchasing installed.
RFQRESP	Retrieves RFQ response messages that have been received. To receive RFQ response messages, you must have PeopleSoft Purchasing installed.
RMALOAD	Retrieves inventory RMA messages that have been received. To receive RMA load messages, you must have PeopleSoft Inventory installed.

To display all of the records in the transaction log, leave these fields blank.

Click the Search button to populate the page with the transactions that match your criteria.

Purging Transactions

Access the Purge page.

Run the Purge process to delete all transactions with a status of *Complete* or *Confirmed* from the transaction log.

Use the Data Collection Setup page to choose to not maintain a history, to maintain a history for all transactions, or to maintain a history only for transactions containing errors. You can also determine whether to purge transactions with a status of *Complete* or *Confirmed* on this page.

You can view the transaction history by running a query. Use the BCT_HIST and BCT_ERR_HIST tables to view the transaction history.

Inbound Data to Purge

You can choose to purge all transactions, whereby the system purges all transactions containing either the *Confirmed* or *Complete* status that you set up on the Data Collection Setup page. Or you can enter a number of days to purge only items with at least that many days since the last activity.

Processing Outbound Application Message Transactions

Outbound EIPs exist throughout the PeopleSoft system, providing interface points for third-party applications requiring information as activity occurs within the PeopleSoft system. The PeopleSoft Application Messaging technology is utilized to format and publish industry standard XML messages. For example, as item master information is entered into PeopleSoft applications, the system generates XML-based messages and delivers them to third-party systems requiring this information to set up their own item master tables.

Understanding the Outbound Transaction Architecture

PeopleSoft SCM applications as well as interacting third-party systems have various processing and timing requirements that dictate when information can be generated or received. For this reason, the integration points provided by PeopleSoft utilize a number of different approaches when generating outbound application messages.

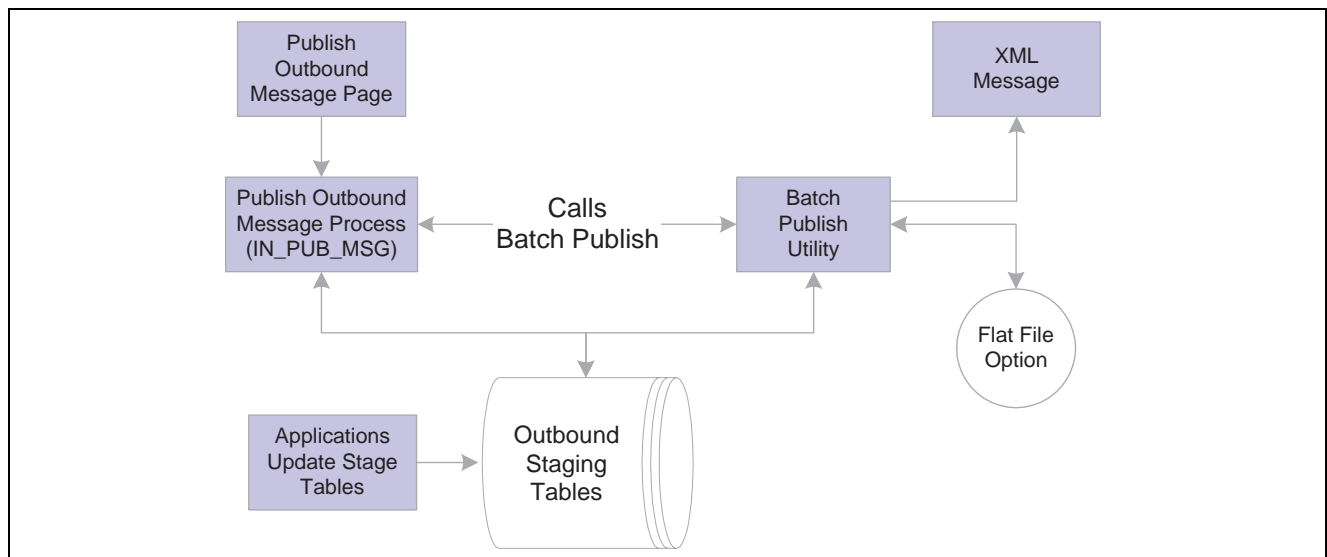
For example, a third-party system requiring item master information from the PeopleSoft Inventory application may want immediate incremental updates as information is changed online or may want periodic updates on a nightly or weekly basis. The Item Master EIP provides both options, giving the third-party system the choice as to how it wants to receive this information.

Component or Incremental Publish

The system generates Component Published messages immediately upon saving a component in various PeopleSoft applications. Components used to maintain setup type information such as items or customers utilize the Component Publish approach.

Batch Publish

This diagram illustrates the batch publish process flow:



Supply chain management batch publish process flow

Batch Publish messages provide the functionality to group many like transactions into a single message.

Background processes that work on batches of transactions at one time utilize this approach.

In addition, other processes use this approach where interface requirements demand various groupings of like transactions based on common information within each transaction. For example, an Advanced Shipping Notice message can be published to a customer when the customer's order is shipped within the PeopleSoft Inventory system. This message may go directly to the customer or it may go through third-party software that converts the XML message to one of the industry standard EDI formats, such as X.12, before passing it on to the customer. Using the options available with the Batch Publish approach, users can dictate whether to create a single message for all customers to send to the third-party software or create individual messages to send directly to each customer.

PeopleSoft SCM applications all use the Publish Outbound Message process to initiate the Batch Publish messages. Built into this routine is the Batch Publish utility, a common PeopleSoft tool that provides the functionality to group and filter or “chunk” messages as noted in the previous example.

The Batch Publish utility also provides the option to create flat files instead of XML messages, when file layout objects exist for transactions being generated. File layout objects are easy to modify, and PeopleSoft provides examples for all transactions included in the EDI feature.

Full Data Replication

Full data replication is the process used to seed, or initially populate or repopulate, a copy of an entire table onto a remote database or legacy system. The entire contents of the table are published to all systems that require a copy of the table. Generally, full data replication occurs with setup tables—that is, relatively static, low volume tables keyed by setID.

Once a copy of the table exists, incremental updates provide a mechanism or process to keep the copy up-to-date with changes made on the master. Incremental updates occur most often with transaction tables—that is, frequently updated tables keyed by business unit.

Most full data replication message names end in _FULLSYNC.

Using Outbound Transactions

PeopleSoft SCM provides these outbound transactions:

EIP	Object Name	PeopleSoft SCM Product	Reference
Advanced Shipping Notice	ADVANCED_SHIPPING_NOTICE	PeopleSoft Inventory	Creating Advanced Shipping Notices See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Creating Shipping Documentation,” Creating Advanced Shipping Notices.
Billing Invoice	BILLING_INVOICE_NOTICE	PeopleSoft Billing	See <i>PeopleSoft Billing 8.8 PeopleBook</i> , “Processing EDI Transactions in PeopleSoft Billing”.

EIP	Object Name	PeopleSoft SCM Product	Reference
Carrier/Shipping Method	CARRIER_SYNC	PeopleSoft Order Management	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining Financials and Supply Chain Management Common Definitions,” Setting Up Freight Carriers.
Carrier/Shipping Method	CARRIER_SYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining Financials and Supply Chain Management Common Definitions,” Setting Up Freight Carriers.
Carrier/Shipping Method	CARRIER_FULLSYNC	PeopleSoft Order Management	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining Financials and Supply Chain Management Common Definitions,” Setting Up Freight Carriers.

EIP	Object Name	PeopleSoft SCM Product	Reference
Carrier/Shipping Method	CARRIER_FULLSYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining Financials and Supply Chain Management Common Definitions,” Setting Up Freight Carriers.
Consumer Usage	CONSUMER_USAGE	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Tracking Material Usage,” Exporting Consumer Usage Information.
Contact	CONTACT_SYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Contacts,” Setting Up Contacts.
Contact	CONTACT_SYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Contacts,” Setting Up Contacts.
Contact	CONTACT_FULLSYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Contacts,” Setting Up Contacts.
Contact	CONTACT_FULLSYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Contacts,” Setting Up Contacts.

EIP	Object Name	PeopleSoft SCM Product	Reference
Credit Card Data	CORPORATE_CARD_DATA_FULL_SYNC	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Managing Procurement Cards”. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.
Credit Card Data	CORPORATE_CARD_DATA_SYNC	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Managing Procurement Cards”. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.
Credit Card Data	CORPORATE_CARD_FULL_SYNC	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Managing Procurement Cards”. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.
Credit Card Data	CORPORATE_CARD_SYNC	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Managing Procurement Cards”. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.
CRM 360 Degree View EIPs	BI_EIP360_RSP	PeopleSoft Billing	See <i>PeopleSoft Billing 8.8 PeopleBook</i> , “Integrating with PeopleSoft CRM”.
CRM 360 Degree View EIPs	BI_EIP360_REQ	PeopleSoft Billing	See <i>PeopleSoft Billing 8.8 PeopleBook</i> , “Integrating with PeopleSoft CRM”.

EIP	Object Name	PeopleSoft SCM Product	Reference
Customer	CUSTOMER_SYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Adding General Customer Information.
Customer	CUSTOMER_SYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Adding General Customer Information.
Customer	CUSTOMER_FULLSYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Adding General Customer Information.
Customer	CUSTOMER_FULLSYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Adding General Customer Information.
Customer Group	CUSTOMER_GROUP_SYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Adding General Customer Information.
Customer Group	CUSTOMER_GROUP_SYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Adding General Customer Information.

EIP	Object Name	PeopleSoft SCM Product	Reference
Customer Group	CUSTOMER_GROUP_FULLSYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Adding General Customer Information.
Customer Group	CUSTOMER_GROUP_FULLSYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Adding General Customer Information.
ePro Availability Check	PV_AVAIL_CHECK_REQ	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Using PeopleSoft eProcurement with a Marketplace,” Using Price and Availability Check.
ePro Availability Check	PV_AVAIL_CHECK_RESP	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Using PeopleSoft eProcurement with a Marketplace,” Using Price and Availability Check.
ePro Direct Connect	PV_DC_CONNECT_REQST	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Integrating with Direct Connect Suppliers,” Setting Up Common Components for Direct Connect.
ePro Direct Connect	PV_DC_CONNECT_RESP	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Integrating with Direct Connect Suppliers,” Setting Up Common Components for Direct Connect.

EIP	Object Name	PeopleSoft SCM Product	Reference
ePro Availability Check	PV_DC_ITEMS	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Using PeopleSoft eProcurement with a Marketplace,” Using Price and Availability Check.
ePro Order Status	PV_ORD_STS_REQ	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Using PeopleSoft eProcurement with a Marketplace”.
ePro Order Status	PV_ORD_STS_RESP	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Using PeopleSoft eProcurement with a Marketplace”.
ePro Price Check	PV_PRICE_CHECK_REQ	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Using PeopleSoft eProcurement with a Marketplace,” Using Price and Availability Check.
ePro Price Check	PV_PRICE_CHECK_RESP	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Using PeopleSoft eProcurement with a Marketplace,” Using Price and Availability Check.
ePro Procurement Order	PV_ORDER	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Dispatching Purchase Orders in PeopleSoft eProcurement,” Setting Up Dynamic Dispatching.

EIP	Object Name	PeopleSoft SCM Product	Reference
ePro xCBL Order	PV_ORDER_XCBL3	PeopleSoft eProcurement	See <i>PeopleSoft eProcurement 8.8 PeopleBook</i> , “Dispatching Purchase Orders in PeopleSoft eProcurement,” Setting Up Dynamic Dispatching.
Internal Location Expected Receipt	INTERNAL_LOC_EXPECTED_RECEIPT	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Creating Shipping Documentation,” Creating Internal Location Expected Receipts.
Interunit Expected Receipt	INTERUNIT_EXPECTED_RECEIPT	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Creating Shipping Documentation,” Creating Interunit Expected Receipts.
Inventory Balance Notification	INV_BAL_NOTIF_BUS_UNIT	PeopleSoft Inventory	Inquiring and Reporting on On Hand Stock See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Inquiring and Reporting About On-Hand Stock,” Providing Inventory Balances to Third-Party Systems.
Inventory Balance Notification	INV_BAL_NOTIF_VENDOR	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Inquiring and Reporting About On-Hand Stock,” Providing Inventory Balances to Third-Party Systems.
Item Master	ITEM_CRM_FULLSYNC_EFF	PeopleSoft Inventory	See <i>PeopleSoft Managing Items 8.8 PeopleBook</i> , “Loading Items”.
Item Master	ITEM_CRM_SYNC_EFF	PeopleSoft Inventory	See <i>PeopleSoft Managing Items 8.8 PeopleBook</i> , “Loading Items”.

EIP	Object Name	PeopleSoft SCM Product	Reference
Item Master	ITEM_CRM_SYNC	PeopleSoft Inventory	See <i>PeopleSoft Managing Items 8.8 PeopleBook</i> , “Loading Items”.
Item Master	ITEM_SYNC	PeopleSoft Inventory	See <i>PeopleSoft Managing Items 8.8 PeopleBook</i> , “Loading Items”.
Item Master	ITEM_SYNC_EFF	PeopleSoft Inventory	See <i>PeopleSoft Managing Items 8.8 PeopleBook</i> , “Loading Items”.
Item Master	ITEM_FULLSYNC	PeopleSoft Inventory	See <i>PeopleSoft Managing Items 8.8 PeopleBook</i> , “Loading Items”.
Item Master	ITEM_FULLSYNC_EFF	PeopleSoft Inventory	See <i>PeopleSoft Managing Items 8.8 PeopleBook</i> , “Loading Items”.
Par Location	PAR_LOCATION_SYNC	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Managing Par Inventory,” Counting Par Location Inventory.
Par Location	PAR_LOCATION_FULLSYNC	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Managing Par Inventory,” Counting Par Location Inventory.
Price List	LISTPRICEFULLSYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price List	PRICE_LIST_DETAIL_FULLSYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price List	PRICE_LIST_DETAIL_SYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.

EIP	Object Name	PeopleSoft SCM Product	Reference
Price List	PRICE_LIST_FULLSYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price List	PRICE_LIST_HEADER_FULLSYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price List	PRICE_LIST_HEADER_SYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price List	PRICE_LIST_SYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price Rule	PRICE_RULE_DATA_FULLSYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price Rule	PRICE_RULE_KEYS_FULLSYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Price Rule	PRICE_RULE_DATA_SYNC	PeopleSoft Enterprise Pricer	See <i>PeopleSoft Enterprise Pricer 8.8 PeopleBook</i> , “Using Pricing Data Messages”.
Product	PRODUCT_SYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Setting Up Products,” Using Product Messages.
Product	PRODUCT_SYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Setting Up Products,” Using Product Messages.

EIP	Object Name	PeopleSoft SCM Product	Reference
Product	PRODUCT_ FULLSYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Setting Up Products,” Using Product Messages.
Product	PRODUCT_FULLSYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Setting Up Products,” Using Product Messages.
Product Configurator Data Sync	CP_CONSTANT_ FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_CONSTRAINT_ FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_EXPRESSION_ FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_GLOBAL_ FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_INTRN_VAR_ FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.

EIP	Object Name	PeopleSoft SCM Product	Reference
Product Configurator Data Sync	CP_MATRIX_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_MESSAGE_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_MULTOP_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_OPTION_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_PRINTCD_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_RULE_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_SECONDARY_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.

EIP	Object Name	PeopleSoft SCM Product	Reference
Product Configurator Data Sync	CP_TEMPLATE_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_TREE_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Configurator Data Sync	CP_VALUE_LIST_FULLSYNC	PeopleSoft Product Configurator	See <i>PeopleSoft Product Configurator 8.8 PeopleBook</i> , “Synchronizing PeopleSoft Product Configuration Data”.
Product Group	PRODUCT_GROUP_SYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Setting Up Products,” Using Product Messages.
Product Group	PRODUCT_GROUP_SYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Setting Up Products,” Using Product Messages.
Product Group	PRODUCT_GROUP_FULLSYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Setting Up Products,” Using Product Messages.
Product Group	PRODUCT_GROUP_FULLSYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Setting Up Products,” Using Product Messages.

EIP	Object Name	PeopleSoft SCM Product	Reference
Product Price List/Catalog	PRODUCT_ PRICELIST_SYNC	PeopleSoft Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages,” Processing Outbound Messages for Product Price Lists.
Production Order Sync	PRODORDERSYNC	PeopleSoft Manufacturing	See <i>PeopleSoft Manufacturing 8.8 PeopleBook</i> , “Maintaining Production Orders and Production Schedules”.
Production Order Update	PRODUCTION_ ORDER_UPDATE	PeopleSoft Manufacturing	See <i>PeopleSoft Manufacturing 8.8 PeopleBook</i> , “Maintaining Production Orders and Production Schedules”.
Purchase Order Dispatch	PURCHASE_ORDER_ DISPATCH	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.
Purchase Order Expected Receipt	PO_EXPECTED_ RECEIPT_SHIPTO	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.
Purchase Order Expected Receipt	PO_EXPECTED_ RECEIPT_BUS_UNIT	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.
Purchase Order Receipt	PO_RECEIPT_ NOTIFICATION	PeopleSoft Purchasing	See Chapter 7, “Integrating With a Third-Party Point-of-Use Supplier System,” page 161 . See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.

EIP	Object Name	PeopleSoft SCM Product	Reference
Purchase Order Requisition	PURCHASE_REQUISITION_LOAD_CRM	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.
Replenishment Request Dispatch	REPLENISHMENT_REQUEST_DISPATCH	PeopleSoft Flow Production Management	See <i>PeopleSoft Flow Production 8.8 PeopleBook</i> , “Maintaining Kanban Cards and Replenishment Requests”.
Request for Quote	PO_REQUEST_FOR_QUOTE	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.
Return to Vendor	RETURN_TO_VENDOR	PeopleSoft Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.
Sales Order Acknowledgement	SALES_ORDER_ACKNOWLEDGEMENT	PeopleSoft Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages,” Using Sales Order and Quote Outbound Messages.
Sales Order Notice	SALES_ORDER_CHANGE_NOTICE	PeopleSoft Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages,” Using Sales Order and Quote Outbound Messages.
Sales Order/Quote Status	SALES_ORDER_STATUS	PeopleSoft Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages,” Using Sales Order and Quote Outbound Messages.

EIP	Object Name	PeopleSoft SCM Product	Reference
Sales Quote Notice	SALES_QUOTE_NOTICE	PeopleSoft Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages,” Using Sales Order and Quote Outbound Messages.
Shipping Order Release	SHIPPING_ORDER_RELEASE	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Picking Inventory,” Creating Shipping Order Release Messages.
Standard Note	STD_NOTE_SYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Additional Customer Information,” Setting Up Standard Notes.
Standard Note	STD_NOTE_SYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Additional Customer Information,” Setting Up Standard Notes.
Standard Note	STD_NOTE_FULLSYNC	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Additional Customer Information,” Setting Up Standard Notes.
Standard Note	STD_NOTE_FULLSYNC_EFF	PeopleSoft Order Management	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Additional Customer Information,” Setting Up Standard Notes.

EIP	Object Name	PeopleSoft SCM Product	Reference
Supply Planning EIPs	SPL_OPT_TBLS_SYNC	PeopleSoft Supply Plannning	See <i>PeopleSoft 8.8 SP1 Supply Planning Multisite Material Planner and PeopleSoft 8.8 SP1 Supply Planning Advanced Multisite Planner PeopleBook</i>
Supply Planning EIPs	SPL_REMOTE_CALL	PeopleSoft Supply Plannning	See <i>PeopleSoft 8.8 SP1 Supply Planning Multisite Material Planner and PeopleSoft 8.8 SP1 Supply Planning Advanced Multisite Planner PeopleBook</i>
Transportation Order	TMS_ORDER_RELEASE	PeopleSoft Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Order Fulfillment Processing,” Transportation Management System EIPs.

Setting Up Chunking

This section provides an overview of chunking and discusses how to set up chunking.

Understanding Chunking

If you are publishing application messages, you may want to set up chunking. When chunking, the system automatically breaks up messages into several smaller messages based on the values in one or more of the fields in the level zero record. For example, if you want to chunk by business unit, messages would be broken up by business unit sending each business unit’s transactions to a node that you have defined. Another example would be for sites sending EDI messages directly to trading partners. If you are sending purchase orders directly to a vendor then you want to make sure that that vendor gets only their transactions. Chunking provides the ability to split a batch of purchase orders into separate messages based on the trading partner. The Integration Broker then provides tools to route the message to specific nodes based on that trading partner identification, in this case the vendor ID.

Note. If you are using a middleware product to transform and route transactions to trading partners then you most likely will not need to use message chunking. All messages would go to the node defined for the middleware product.

Chunking is implemented using the Batch Publish Utility or the Full Data Publish Utility. In either case a batch publish rule is created and a *chunking rule* can be attached. The chunking rule defines a table containing a set of values that map to specific nodes. For example, in the example above where you are chunking by vendor ID, the chunking rule table would contain a set of vendor IDs that map to individual nodes for trading partners receiving the purchase order message.

The following is an step by step explanation of the process flow of a transaction using message chunking:

1. Chunking Selection

Run process that generated message. This may be the Full Data Publish Utility or one of the batch based messages that use the Batch Publish Utility.

Note. All messages generated from the Publish Outbound Messages use the Batch Publish Utility.

When the batch publish utility or full data publish utilities run they recognize the chunking rule assigned to the batch publish rule and split the different transactions into separate messages for each chunking rule value. They then publish the message handing it over to the Integration Broker.

2. Chunking Node Routing

The Integration Broker makes the decision of which node will receive the Message. Standard processing for the Integration Broker is to send the message to any node that has a transaction setup for that message. When chunking, you want to override the standard method of processing and force the Integration Broker to send the message only to the node for which the message was intended. This is done by assigning OnRouteSend PeopleCode to the message in the Application Designer. When OnRouteSend PeopleCode exists on a message the Integration Broker will only send the message to the nodes that it is told to by this routine. PeopleSoft provides some common functions that can be used for this purpose. The setup instructions for different messages explain exactly how to setup the OnRouteSend PeopleCode for messages where in most cases when using a chunking rule with the batch publish utility or the full data publish utility all you need to do to override the Integration Brokers standard processing is to add the following PeopleCode to the OnRouteSend PeopleCode for the message being sent.

Note. Incremental Publish messages do not use message chunking as defined above. By definition, incremental published messages do not need the Chunking Selection step because they only contain a single transaction. But, if incremental publish messages need to be sent to specific nodes based on values in the message then the Chunking Node Routing step defined above would still be required.

PeopleSoft provides a number of chunking rules, chunking rule tables, data entry pages and OnRouteSend functions that can be used to maintain node mappings and routing rules for some of the more commonly used field values. The data entry pages are noted in the Pages Used to Set up Chunking table below. Information about setup for specific messages is provided in the PeopleBook for the actual application publishing the message. Additional information is provided in the PeopleSoft Enterprise Components PeopleBook explaining how to create your own customized chunking rule, chunking rule table and data entry pages.

For an example of how multiple chunking rules can be setup on a single message look at the batch publish rules for the ADVANCED_SHIPPING_NOTICE Message. These batch publish rules were provided as examples to show the power of message chunking. In this example, the ADVANCED_SHIPPING_NOTICE rule is the standard rule used without chunking. If you want to chunk by Business Unit just attach the Business Unit chunk rule to the batch publish rule. You would also have to populate the Business Unit to node values in the chunk table and set up the OnRouteSend Routing Rule on the Message. In this case, to setup the routing rule you would add the following to the OnRouteSend people code on the ADVANCED_SHIPPING_NOTICE message:


```

Declare Function GetNodes PeopleCode
FUNCLIB_INEIP.PUBLISH_ROUTE_PC FieldFormula;
GetNodes ( " " );

```

If you want to chunk by Ship To Customer then activate the ASN_SETID_SHIPTO batch publish rule. In this case you also need to populate the customer chunk rule table and setup the OnRouteSend Routing Rule.

If you want to chunk by Sold To Customer then setup the ASN_SETID_SOLDTO chunk rule, populate the customer chunk rule table and setup the OnRouteSend Routing Rule.

See Also

PeopleSoft Enterprise Components

Pages Used to Set Up Chunking

Page Name	Object Name	Navigation	Usage
Add Nodes to Chunk Rule	EO_ADNODECHUNK_PNL	Enterprise Components, Integration Definition, Map Chunking Rules, Node to ChunkRule, Add Nodes to Chunk Rule	Map nodes by Chunk Rules.
BusUnit Mapping	EO_CHUNKBU	Enterprise Components, Integration Definition, Map Chunking Rules, Business Units, BusUnit Mapping	Maintain ChunkRule business unit mapping.
Quick Map	EO_ADDBUNODE_PNL	Enterprise Components, Integration Definition, Map Chunking Rules, BU to ChunkRule/Node, Quick Map	Map business units by ChunkRules or nodes.
Map Business Unit	EO_ADDNODEBU_PNL	Enterprise Components, Integration Definition, Map Chunking Rules, ChunkRule/Node to BU, Map Business Unit	Map ChunkRules or nodes by business unit.
SetId Mapping	EO_CHUNKSETID	Enterprise Components, Integration Definition, Map Chunking Rules, Setids, Setid Mapping	Maintain ChunkRule setID mapping.
Quick Map	EO_ADDSIDNODE_PNL	Enterprise Components, Integration Definition, Map Chunking Rules, Setid to ChunkRule/Node, Quick Map	Map setIDs by ChunkRules or nodes.
Map Set IDs	EO_ADDNODESID_PNL	Enterprise Components, Integration Definition, Map Chunking Rules, ChunkRule/Node to Setid, Map Set IDs	Map ChunkRules by setID.

Page Name	Object Name	Navigation	Usage
Customer ID Chunk	OM_CHUNKCUSTID	Data Exchanges, Chunking Rule, CustID to Node Mapping, Customer ID Chunk	Map publish application messages by customer.
BU/Location Node Mapping	IN_CHUNKBULOCATION	Data Exchanges, Chunking Rule, BU/Loc to Node Mapping, BU/Location Node Mapping	Map business units and locations.
BU/Par Location Node Mapping	IN_CHUNKBUPARLOC	Data Exchanges, Chunking Rule, BU/Par to Node Mapping, BU/Par Location Node Mapping	Set up chunking by business unit and par location for publish application messages.
Setup Vendor to Node	PO_CHUNK_VENDOR	Data Exchanges, Chunking Rule, Manage ChunkRule VendorID Map, Setup Vendor to Node	Set up chunking by vendor ID for publish application messages.
PO Chunk Shipto	PO_CHUNK_SHIPTO	Data Exchanges, Chunking Rule, Ship to Loc to Node Mapping, PO Chunk Shipto	Set up chunking by ship to location for publish application messages.
Source Code Chunk	OM_CHUNK_SRC_CD	Data Exchanges, Chunking Rule, Source Code to Node Mapping, Source Code Chunk	Set up chunking by source code for publish application messages.

See Also

PeopleSoft Enterprise Components

Publishing Outbound Messages

This section discusses how to publish outbound messages.

Page Used to Publish Outbound Messages

Page Name	Object Name	Navigation	Usage
Publish Outbound Message	IN_RUN_PUB_MSG	Data Exchanges, Publish Outbound Message	Initiate the outbound message publish process for outbound PeopleSoft SCM messages that use the batch publish design pattern.

Publishing Outbound Messages

Access the Publish Outbound Message page.

Publish Outbound Message			
Run Control ID: ADHOC		Report Manager	Process Monitor
Language: English		Run	
Inventory Messages <ul style="list-style-type: none"> <input type="checkbox"/> Balance Notification <input type="checkbox"/> Advanced Shipping Notices <input type="checkbox"/> Interunit Exp Receipts <input type="checkbox"/> Internal Location Exp Receipts <input type="checkbox"/> Shipping Order Release <input type="checkbox"/> Item Status Change <input type="checkbox"/> TMS Order Release 	Purchasing Messages <ul style="list-style-type: none"> <input type="checkbox"/> Request for Quotation <input type="checkbox"/> Purchase Order Dispatch <input type="checkbox"/> Return To Vendor <input type="checkbox"/> PO Expected Receipts 	Order Management Messages <ul style="list-style-type: none"> <input type="checkbox"/> Sales Order Acknowledgement <input checked="" type="checkbox"/> Sales Order Change Notice <input type="checkbox"/> Sales Quote Notice <input type="checkbox"/> Product Price List <input checked="" type="checkbox"/> Sales Order/Quote Status 	
	Manufacturing Messages <ul style="list-style-type: none"> <input type="checkbox"/> Production Order Update <input type="checkbox"/> Item Revision <input type="checkbox"/> Replenish Request Dispatch 	Billing Messages <ul style="list-style-type: none"> <input type="checkbox"/> Billing Invoice Notice 	

Publish Outbound Message page

Note. This page is used only to publish messages that use the batch publish design pattern.

Select the check box by the name of the message that you want to publish. The system then makes the message name a link to a transaction-specific page for that message. You can publish messages one at a time or in multiples.

CHAPTER 3

SCM EIP Examples

In this chapter, we discuss setting up and processing the following EIPs:

- Advanced Shipment Notice
- Sales Order
- Sales Order Acknowledgement
- Purchase Order Dispatch
- Customer
- Billing Invoice

Understanding EIP Examples

We are providing examples of the most commonly used SCM EIPs. EIP setup and processing is similar for EIPs of the same design pattern, so you can use this information and apply it to other EIPs.

See [Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” Processing Inbound Application Message Transactions, page 13.](#)

See [Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” Processing Outbound Application Message Transactions, page 39.](#)

EIP	Description
Advanced Shipping Notice	Notifies customers that their sales orders have been shipped using the Publish Outbound Message process.
Sales Order	Loads sales orders.
Sales Order Acknowledgement	Sends message acknowledging receipt of sales order.
Purchase Order Dispatch	Purchase order dispatched to a vendor using the Publish Outbound Message process
Customer	Customer information published to an external system.
Billing Invoice	Invoice sent out to a customer using the Publish Outbound Message process.

Common Elements in this Chapter

Asynchronous	Messages that don't occur at the same time. Used for publish and subscribe messages where there is a lapse in time between the message being sent and received.
Batch Publish	Use this design pattern to publish messages from a batch application. The batch application can be a COBOL or Structured Query Report program that takes either a procedural or set-based approach, or it can be an Application Engine set-based program.
Batch Subscribe	This design pattern enables you to perform edits against messages in sets. This can be a useful technique for high volume data, including millions of inbound rows. This design pattern is useful when you know that a single message definition may contain multiple instances of a transaction, or when you must reuse an existing batch program.
Component Publish	In this design pattern, the transaction or setup data that you want to send out of PeopleSoft is being updated by using a PeopleSoft component. In this case, the data is already in the component buffer, and the Publish PeopleCode function is used to publish a message.
Full Table Publish	Use this design pattern to populate an entire copy of a table onto a remote database or legacy system. Generally, full data replication occurs with setup tables, or relatively static, low-volume tables that are keyed by setID. When a copy of a table exists on the remote system, incremental updates can be used.
Full Table Subscribe	Use this design pattern to subscribe to messages that contain an entire copy of a table that is published from a remote database or legacy system. Generally, full data replication occurs with setup tables, or relatively static, low-volume tables that are keyed by setID. When a copy of a table exists on the remote system, incremental updates can be used.
Synchronous	Occurring or existing at the same time. Used for messages that are sent out and receive an immediate response.

Setting Up the Advanced Shipping Notice EIP

This section discusses the Advanced Shipping Notice EIP.

Understanding the Advanced Shipping Notice EIP

The Advanced Shipment Notice (ASN) EIP meets X.12 EDI requirements of the 856 - Ship Notice/Manifest transactions set. ASN is an outbound asynchronous batch publish EIP.

If enabled, the system generates an Advanced Shipping Notice EIP transaction message when a sales order entered from PeopleSoft Order Management has been depleted in PeopleSoft Inventory. You can specify whether to generate the ASN for all sales order shipments in the business unit, sales orders belonging to a specific shipping ID, sales orders for a specific sold to customer, or sales orders for a specific ship to customer.

Before you can publish messages with the Advanced Shipment Notice EIP, you must:

Type of Setup	Steps
Complete PeopleTools setup	<ul style="list-style-type: none"> • Activate the message (ADVANCED_SHIPPING_NOTICE). • If using message chunking, setup the OnRoute Send PeopleCode event on the message. • Set up an outbound synchronous transaction defining the ADVANCED_SHIPPING_NOTICE message on each node that will receive the transaction. • Verify the ADVANCED_SHIPPING_NOTICE message channel is in a run mode.
Complete application setup	<ul style="list-style-type: none"> • Select the Use Advanced Shipment Notice option for the business unit on the Inventory Definition - Business Unit Options page. • Associate customers receiving Advanced Shipment Notice EIP messages with an ASN document code and a preferred communication value of <i>XML Only</i> or <i>XML and Print</i>. If PeopleSoft Order Management is installed, you set up these values on the Contact Additional Info page in the Maintain Contact component.
Enterprise Utility setup	<ul style="list-style-type: none"> • Activate the associated batch publish rule and specify the appropriate output for the message (an XML-based message or a flat file). If you are using message chunking, select a chunking rule ID. • If you are using message chunking, set up the chunking rule mapping definitions.

See Also

[Chapter 7, “Integrating With a Third-Party Point-of-Use Supplier System,” page 161](#)

[Chapter 8, “Integrating With a Third-Party Surgical Resource Software Application,” page 169](#)

Pages Used to Set Up the Advanced Shipping Notice EIP

Page Name	Object Name	Navigation	Usage
Batch Publish Rules	EO_MSGPUBATCH	Enterprise Components, Integration Definitions, Batch Publish Rules	Set up publication rules. You must activate a publish rule for the publication messages you create to follow. This rule includes instructions on message chunking, if necessary.
Contact	CONTACT	Customers, Contact Information	Maintain information about each contact.
Contact Customer	CONTACT_CUST_PAGE	Click the Contact Customer Information link on the Contact page.	Indicate the primary ship to contact.
Contact Additional Info	CONTACT_ADDTL_INFO	Click the Additional Info link for a contact on the Contact Customer page.	Enter the preferred communication method for the selected document.
Business Unit Definition — Inventory Options page	BUS_UNIT_INV5	Set Up Financials/Supply Chain, Business Unit Related, Inventory, Inventory Definition, Inventory Options	Define external interfaces.

Activating Messages

To activate a message for publication:

1. Open an instance of PeopleSoft Application Designer.
2. Select File, Open. The Open Object dialog box appears.
3. In the Definition drop-down menu, select *Message*, enter the message name in the Name field, and click Open. The message you specified opens.
4. Select File, Definition Properties. The Message Properties dialog box appears.
5. On the Message Properties dialog box, select the Use tab.
6. Select the Active check box to activate the message.
7. Click OK, then select File, Save to save the message.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Integration Broker

Verifying Contacts

You must ensure that the customer you are interacting with has a contact set up to accept EDI transmissions, and that the contact is a ship to contact.

Access the Contact page using the Customer ID in correction mode.

Contact

SetID: SHARE **Contact ID:** 10

Contact Information Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1990 ***Status:** Active +

***Name:** Jeffreys,Jenny ***Contact Flag:** External

Title: Manager External Contact

Email ID:

Salutation Code: **Salutation:**

***Preferred Communication:** Call Call

Language Code: English

Person ID:

[Contact Customer Information](#) [Contact Phone and Type](#) [User Profile](#)

Contact Page

Access the Contact Customer page using the Contact Customer Information link.

Contact Customer

SetID: SHARE **Contact ID:** 10 Jeffreys,Jenny **Effective Date:** 01/01/1990

Link Contact to Customer Customize | Find | View All First 1-3 of 3 Last

*Customer SetID	*Customer ID	Customer Name	Location		Additional Info	Primary Bill To	Primary Ship To	Primary Sold To		
SHARE	1018	National Institute of Health Science	1	Main Address	Additional Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
SHARE	1020	Department of Health & Human Services	1	Granting Office	Additional Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
SHARE	FRA01	ITN Wholesale, France	1	Main	Additional Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-

Contact Customer page

Click the Primary Ship To check box to receive the proper shipping notifications.

Click the Additional Info link corresponding to the appropriate customer.

Contact Additional Info

SetID: SHARE Contact: 10 Jeffreys,Jenny Effective Date: 01/01/1990
 Customer SetID: SHARE Customer: 1018 National Institute of Health Science

Card Type	Card Name	Card Number	Primary Card	First Name	Last Name	Expiration Month	Expiration Year	Address Sequence Number	Credit Card Address
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Documentation

Document Code	Preferred Communication	Number of Copies
ASN	R	1

Contact Additional Info page

Under the Documentation group box, make sure the Document Code is *ASN* (advanced shipping notification), and Preferred Communication is *R* (XML and Print) or *I* (XML only).

See Also

PeopleSoft Working with Customers and Orders 8.8 PeopleBook, “Maintaining Contacts,” Selecting Communication Preferences and Entering Contact Credit Card Information

Enabling the Inventory Business Unit

You must enable ASN generation in the business unit shipping the items.

Access the Inventory Definition - Business Unit Options page.

Business Unit Definition **Business Unit Options** Business Unit Counters Business Unit Books

Unit: US001 US001 NEW YORK OPERATIONS

Inventory Status <input checked="" type="checkbox"/> Incl Non-Open in Avail Qty	Consignment <input type="checkbox"/> Allow Transfers to Owned Loc	InterUnit/RMA Receiving <input type="checkbox"/> Auto Close Receipts
Lot Control <input type="checkbox"/> Allow Auto-Add of New Lots <input type="checkbox"/> Allow Lot Allocation <input type="checkbox"/> Use Lot Allocation Workflow	External Interfaces <input checked="" type="checkbox"/> Use External Warehouse Control <input type="checkbox"/> Ship Using TMS Reference ID <input type="checkbox"/> Use Internal Expected Receipt <input checked="" type="checkbox"/> Use Advanced Shipment Notice	Accounting <input type="checkbox"/> Combo Edit *SpeedType Level Off
Auto Round Opt *Automatic UOM Round Option: Warning	Negative Inventory <input type="checkbox"/> Allow Negative Inventory <input type="checkbox"/> Display Warning Messages	

[Shipping Options](#) [Replenishment Options](#) [Revenue and Billing Defaults](#) [RMA Defaults](#) [Estimated Shipment Definition](#)

Inventory Definition - Business Unit Options page

Click the Use Advanced Shipment Notice check box in the External Interfaces group box.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Defining Your Operational Structure in PeopleSoft Inventory,” Defining PeopleSoft Inventory Business Unit Attributes

Activate the Batch Publish Rule

Access the Batch Publish Rules page.

Batch Publish Rules page

1. Select *Active* Status to activate this publish rule definition for this message to prevent this rule from applying to this message.
2. Select the appropriate Output Format. The PeopleSoft Application Engine program can create either an Extensible Markup Language (XML) message that flows through application messaging architecture or a flat file generated on the PeopleSoft Process Scheduler machine and not published elsewhere. Always select Message as your format when you send data to PeopleSoft systems, and Flat File if you are using EDI.
3. If you want to use message chunking, select a Chunking Rule ID.

See [Chapter 3, “SCM EIP Examples,” Setting Up Chunking, page 97](#).

Chunking the Advanced Shipping Notice EIP

Chunking is only needed if you have requirements to break up the messages and send them to different destinations based on attributes in the message such as business unit or customer ID. The most common use of chunking with the ASN message is to send a single customer’s messages to a specific node setup for that trading partner. If you are using a middleware product to actually determine trading partner destinations then a single message with all trading partner transactions can usually be sent directly to the middleware product. You would not need to activate message chunking in this situation.

For an example of how to use chunking, look at the batch publish rules for the **ADVANCED_SHIPPING_NOTICE** Message. These batch publish rules were provided as examples to show the power of message chunking.

The **ADVANCED_SHIPPING_NOTICE** batch publish rule is the standard rule used without chunking. If you want to chunk by Business Unit just attach the **BUSINESS_UNIT** chunk rule to the batch publish rule. You would also have to populate the Business Unit to node values in the chunk table and set up the OnRouteSend Routing Rule on the Message when you activate it in the Application Designer.

If you want to chunk by Ship To Customer then activate the **ASN_SETID_SHIPTO** batch publish rule. In this case you also need to populate the customer chunk rule table and setup the OnRouteSend Routing Rule.

If you want to chunk by Sold To Customer then activate the **ASN_SETID_SOLDTO** chunk rule, populate the customer chunk rule table and setup the OnRouteSend Routing Rule.

See Also

PeopleSoft Enterprise Components, “Assigning Publishing Rules,” Assigning Batch Publishing Rules

PeopleSoft Enterprise Components, “Assigning Publishing Rules,” Setting Up Message Chunking

Processing the Advanced Shipping Notice EIP

This sections discusses processing the Advanced Shipping Notice EIP.

Pages Used to Process the Advanced Shipping Notice EIP

Page Name	Object Name	Navigation	Usage
Publish Outbound Message	IN_RUN_PUB_MSG	Data Exchanges, Publish Outbound Message	Initiate the outbound message publish process for outbound SCM messages that use the batch publish design pattern.
Advanced Shipping Notices Selection Criteria	IN_RUN_SHPNTC_ASN	Select Advanced Shipping Notices on the Publish Outbound Message page to enable the Advanced Shipping Notices link. Click the Advanced Shipping Notices link to access the Advanced Shipping Notices Selection Criteria page.	Launch the Advanced Shipping Notices outbound transaction for sales orders that have been depleted.

Publishing Advanced Shipping Notices

Access the Publish Outbound Message page.

Publish Outbound Message

Run Control ID: ASN Report Manager Process Monitor Run

Language: English

Inventory Messages <ul style="list-style-type: none"> <input type="checkbox"/> Balance Notification <input checked="" type="checkbox"/> <u>Advanced Shipping Notices</u> <input type="checkbox"/> Interunit Exp Receipts <input type="checkbox"/> Internal Location Exp Receipts <input type="checkbox"/> Shipping Order Release <input type="checkbox"/> Item Status Change <input type="checkbox"/> TMS Order Release 	Purchasing Messages <ul style="list-style-type: none"> <input type="checkbox"/> Request for Quotation <input checked="" type="checkbox"/> <u>Purchase Order Dispatch</u> <input type="checkbox"/> Return To Vendor <input type="checkbox"/> PO Expected Receipts 	Order Management Messages <ul style="list-style-type: none"> <input type="checkbox"/> Sales Order Acknowledgement <input type="checkbox"/> Sales Order Change Notice <input type="checkbox"/> Sales Quote Notice <input type="checkbox"/> Product Price List <input type="checkbox"/> Sales Order/Quote Status
	Manufacturing Messages <ul style="list-style-type: none"> <input type="checkbox"/> Production Order Update <input type="checkbox"/> Item Revision <input type="checkbox"/> Replenish Request Dispatch 	Billing Messages <ul style="list-style-type: none"> <input checked="" type="checkbox"/> <u>Billing Invoice Notice</u>

Publish Outbound Message page

Click the Advanced Shipping Notices check box, and click the Advanced Shipping Notices link to access the Advanced Shipping Notices Selection Criteria page.

Advanced Shipping Notices Selection Criteria

Run Control ID: ASN Report Manager Process Monitor Run

Language: English

Selection Criteria Find | View All First 1 of 1 Last

*Unit: US001

*Request ID: Description: + -

Selection Options <ul style="list-style-type: none"> <input checked="" type="radio"/> All Shipments <input type="radio"/> Sold To Customer <input type="radio"/> Ship To Customer <input type="radio"/> Specific Shipping ID 	Selection Parameters <p>Source Bus Unit: </p> <p>Sold To Customer: </p> <p>Ship To Customer: </p> <p>Shipping ID: </p>
---	---

☒ Re-Generate Message

OK Cancel

Advanced Shipping Notices Selection Criteria page

All Shipments

Select to generate this transaction for all sales order shipments that have been through the Depletion process (INPDDEPL), but have not previously generated an ASN.

Sold To Customer	Select to generate this transaction for a sales order with a specific sold to customer.
Ship To Customer	Select to generate this transaction for a sales order with a specific ship to customer.
Specific Shipping ID	Select to generate this transaction for sales orders with a specific shipping ID.
Source Bus Unit	Select a valid source business unit. A source business unit is the PeopleSoft Order Management business unit that created the sales order. This field is required if you elect in the Selection Options group box to generate this transaction for a specific sold to or ship to customer. This field is not available for entry if you elect in the Selection Options group box to generate this transaction for all shipments, or for a specific shipping ID.
Sold To Customer	Select a valid sold to customer. This field is only available for entry and is required if you elect in the Selection Options group box to generate this transaction for a specific sold to customer.
Ship To Customer	Select a valid ship to customer. This field is only available for entry and is required if you elect in the Selection Options group box to generate this transaction for a specific ship to customer.
Shipping ID	Select a valid shipping ID. This field is only available for entry and is required if you elect in the Selection Options group box to generate this transaction for a specific shipping ID.
Re-Generate Message	Select this option to regenerate a message for sales orders that have already been sent out.

Note. When you navigate to the process monitor and wait till the process completes successfully, you can click the Details link and then the View Log/Trace link. This shows the output file as a link. The system generates the flat file to reflect the ASN information for the corresponding shipping ID.

Message Separation

PeopleSoft Inventory creates a single occurrence of an ASN transaction for each combination of business unit, source business unit, sold to customer, ship to customer, shipping ID, carrier ID, and ship via. The transaction message also lists the ASN creation date and time, the source business unit's address, the vehicle ID, the quantity ordered, the shipping weight, and, if defined, the shipping container ID and container type.

PeopleSoft sends the generated transaction to the ship to customer, the sold to customer, or both.

Troubleshooting Information

The system does not create an ASN under the following circumstances:

- The shipment has not been through the Depletion process (INPDDEPL).
- The order is a drop ship or is for non-inventory items.
- The transaction has a demand source other than PeopleSoft Order Management.
- PeopleSoft Order Management is not installed.

See Also

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

Setting Up the Sales Order Inbound EIP

This section discusses the Sales Order EIP

Understanding the Sales Order Inbound EIP

The Sales Order EIP subscribes to a message that contains sales orders.

This asynchronous batch subscribe message also supports flat-file processing for EDI transaction X.12 850.

Before you can subscribe to messages with the Sales Order EIP, you must:

Type of Setup	Steps
Complete PeopleTools setup	<ul style="list-style-type: none"> • Activate the message (SALES_ORDER). • Define Nodes
Complete application setup	None for this message.
Enterprise Utility setup	For EDI/XML messages, confirm that the status is set to <i>Active</i> on the Inbound File page in the Inbound File Rule component.

Pages Used to Set Up the Sales Order EIP

Page Name	Object Name	Navigation	Usage
File Inbound	EO_FILE_INBOUND	Enterprise Components, Integration Definitions, Inbound File Rule	Establish inbound file rules for inbound EIPs.

Activating Messages

To activate a message for publication:

1. Open an instance of PeopleSoft Application Designer.
2. Select File, Open. The Open Object dialog box appears.
3. In the Definition drop-down menu, select *Message*, enter the message name in the Name field, and click Open. The message you specified opens.
4. Select File, Definition Properties. The Message Properties dialog box appears.
5. On the Message Properties dialog box, select the Use tab.
6. Select the Active check box to activate the message.
7. Click OK, then select File, Save to save the message.

8. Right click on 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.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Integration Broker

Defining Nodes

To define nodes:

1. Navigate to PeopleTools, Integration Broker. Select Node Definition.
2. Add the new node definition.
3. Select the Node info tab, and click the Active Node check box.
4. Select the connectors tab, and enter the gateway ID and connector ID.
5. Select Save and exit.
6. Navigate to PeopleTools, Integration Broker and select Gateways.
7. Enter the Gateway URL and load the correct connector.
8. Save and exit.

Setting the Inbound File Rule

Access the File Inbound page.

File Inbound

File Identifier:

SCM_INBOUND_EDI

*Inbound File:

C:\Temp\Scm_inbound_index.txt

☒ Index Flag

*Status:

Active

File Layout ID:

998

LUW Size:

Program Name:

Section:

☒ Create Message Header

☒ Create Message Trailer

File Layout

Customize | Find | View All |

First 1 of 11 Last

	*Definition Name	*Message Name		
1	SALES_ORDER	SALES_ORDER_LOAD	+	-

File Inbound page

Change the Status to *Active*. Add the Definition Name of *SALES_ORDER*, and Message Name of *SALES_ORDER_LOAD*.

Processing Inbound Sales Orders

This section discusses how you process inbound sales orders.

Pages Used to Process Inbound Sales Orders

Page Name	Object Name	Navigation	Usage
Electronic Commerce	RUN_OM_EC	Order Management, Electronic Commerce, Process Staged Orders/RFQs	Establish process parameters for inbound Sales Order EIPs.
Data Def Maint (Data Definition Maintenance)	EO_EIP_CTL_MAINT	Data Exchanges, Transaction Error Handling, Maintain Data Definitions, Data Def Maint (data definition maintenance)	View data detail or correct errors for subscribe messages that contain data rather than transactions
Error Summary	OM_EIP_ORDERS	Click the Detail button on the Data Definition Maintenance page.	View the error queue.
Order Completion	RUN_OM_BACKGRND	Order Management, Quotes and Orders, Process Orders, Order Completion	Run the Order Completion process to complete processing for the request for all inbound messages.

Running Electronic Commerce

Access the Run Electronic Commerce page.

Electronic Commerce

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

☒ Delete Staging Records

Process Request Parameters [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Business Unit	Transaction Type	EIP Control ID	Source Code
US001	PO	12854701376384770000000001	

+

-

Electronic Commerce page

You can select a business unit, specify a transaction type and EIP control ID, and source code to limit the data to process.

Correcting Errors

Access the Data Definition Maintenance page.

Data Def Maint

Transaction Type: PO Inbound Sales Order - 850 Unit: Search

☐ Queue Based

☒ Stage Table Status: Reference:

Stage Table Data Customize | Find | View All | First 1-2 of 2 Last

Stage Data	Reference	Publish Data	Date Time	Process Instance	
	Status	EIP Control ID	Transaction Type	Description	User
1	Complete	12854701376384770000000001	PO	Inbound Sales Order - 850	VP1
2	Error	16536454359569070000000001	PO	Inbound Sales Order - 850	VP1

Data Definition Maintenance page

Select a Transaction Type of *PO*. Enter a business Unit. Select Stage Table, and optionally enter a Status. Click the Search button.



Click to access the error details.

Error Summary

Transaction Type: PO EIP Control ID: 16536454359569070000000001

Status: Error found on the transaction

Error Queue Customize | Find | View All | First 1-6 of 6 Last

Field Properties	Edit Properties	Additional Information
	Field Name	Record
1	CARRIER_ID	ORD_HEADER_EC
2	STATE	ORD_ADDR_EC
3	TEXT80	ORD_CDATA_EC
4	TEXT254	ORD_NOTE_EC
5	SHIP_FROM_BU	ORD_LINE_EC
6	SHIP_FROM_BU	ORD_SCHEDULE_EC

[Data Definition Maintenance](#) [Header](#) [Line](#) [Schedule](#)

[Addresses](#) [Notes](#) [User Defined Reference](#)

Error Summary page

Navigate to the Header, Line, Schedule, Addresses, Notes, or User Defined References to fix errors.

See Also

PeopleSoft Order Management 8.8 PeopleBook, “Using Sales Order and Quotation Messages”

Completing the Orders

Access the Order Completion page.

Order Completion

Run Control ID: AUTOSELECT

Report Manager

Process Monitor

Run

Process Request Parameters

From Business Unit:

To Business Unit:

From Order Number:

To Order No:

From Order Date:

To Order Date:

From Order Group:

To Order Group:

From Customer Id:

To Customer ID:

From Source Code:

To Source Code:

Return to Process Orders

Order Completion

Enter the selection criteria, and click Run.

See Also

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

Setting Up the Sales Order Acknowledgement EIP

This section discusses the Sales Order Acknowledgement EIP.

Understanding the Sales Order Acknowledgment EIP

This message publishes an acknowledgement indicating that an order has been received. The Sales Order Acknowledgement EIP meets X.12 EDI requirements of the 855 transaction set. Sales Order Acknowledgement is an outbound asynchronous batch publish EIP.

Before you can publish messages with the Sales Order Acknowledgement EIP, you must:

Type of Setup	Steps
Complete PeopleTools setup	Activate the message (SALES_ORDER_ACKNOWLEDGEMENT).

Type of Setup	Steps
Complete application setup	Associate customers receiving sales order acknowledgements with an <i>ACKN</i> document code and a preferred communication value of <i>XML Only</i> or <i>XML and Print</i> . If PeopleSoft Order Management is installed, you set up these values on the Contact Additional Info page in the Maintain Contact component.
Enterprise Utility setup	Activate the associated batch publish rule and specify the appropriate output for the message (an XML-based message or a flat file).

See Also

[Chapter 7, “Integrating With a Third-Party Point-of-Use Supplier System,” page 161](#)

[Chapter 8, “Integrating With a Third-Party Surgical Resource Software Application,” page 169](#)

Pages Used to Set Up the Sales Order Acknowledgement EIP

Page Name	Object Name	Navigation	Usage
Batch Publish Rules	EO_MSGPUBATCH	Enterprise Components, Integration Definitions, Batch Publish Rules	Set up publication rules. You must activate a publish rule for the publication messages you create to follow. This rule includes instructions on message chunking, if necessary.
Contact	CONTACT	Customers, Contact Information	Maintain information about each contact.
Contact Customer	CONTACT_CUST_PAGE	Click the Contact Customer Information link on the Contact page.	Indicate the primary ship to contact.
Contact Additional Info	CONTACT_ADDTL_INFO	Click the Additional Info link for a contact on the Contact Customer page.	Enter the preferred communication method for the selected document.

Activating Messages

To activate a message for publication:

1. Open an instance of PeopleSoft Application Designer.
2. Select File, Open. The Open Object dialog box appears.
3. In the Definition drop-down menu, select *Message*, enter the message name in the Name field, and click Open. The message you specified opens.
4. Select File, Definition Properties. The Message Properties dialog box appears.
5. On the Message Properties dialog box, select the Use tab.
6. Select the Active check box to activate the message.

7. Click OK, then select File, Save to save the message.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Integration Broker

Verifying Contacts

You must ensure that the customer you are interacting with has a contact set up to accept EDI transmissions, and that the contact is a ship to contact.

Access the Contact page using the Customer ID in correction mode.

Contact

SetID: SHARE Contact ID: 10

Contact Information Find | View All First 1 of 1 Last

*Effective Date: 01/01/1990 *Status: Active

*Name: Jeffreys,Jenny *Contact Flag: External

Title: Manager External Contact

Email ID:

Salutation Code: Salutation:

*Preferred Communication: Call Call

Language Code: English

Person ID:

[Contact Customer Information](#) [Contact Phone and Type](#) [User Profile](#)

Contact Page

Access the Contact Customer page using the Contact Customer Information link.

Contact Customer

SetID: SHARE Contact ID: 10 Jeffreys,Jenny Effective Date: 01/01/1990

Link Contact to Customer Customize | Find | View All First 1-3 of 3 Last

Customer Self Service Security

*Customer SetID	*Customer ID	Customer Name	Location		Additional Info	Primary Bill To	Primary Ship To	Primary Sold To		
SHARE	1018	National Institute of Health Science	1 <input type="button" value="Q"/>	Main Address	Additional Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
SHARE	1020	Department of Health & Human Services	1 <input type="button" value="Q"/>	Granting Office	Additional Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
SHARE	FRA01	ITN Wholesale, France	1 <input type="button" value="Q"/>	Main	Additional Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Contact Customer page

Click the Primary Ship To check box to receive the proper shipping notifications.

Click the Additional Info link corresponding to the appropriate customer.

Contact Additional Info

SetID: SHARE **Contact:** 10 Jeffreys,Jenny **Effective Date:** 01/01/1990
Customer SetID: SHARE **Customer:** 1018 National Institute of Health Science

Credit Card Information Customize | Find | View All | First 1 of 1 Last

Card Type	Card Name	Card Number	Primary Card	First Name	Last Name	Expiration Month	Expiration Year	Address Sequence Number	Credit Card Address
			<input type="checkbox"/>						Credit Card Address

Documentation Customize | Find | View All | First 1 of 1 Last

*Document Code	*Preferred Communication	Number of Copies
ASN	R	1

Contact Additional Info page

Under the Documentation group box, make sure the Document Code is *ACKN* (order acknowledgement), and Preferred Communication is *R* (XML and Print) or *I* (XML only).

See Also

PeopleSoft Working with Customers and Orders 8.8 PeopleBook, “Maintaining Contacts,” Selecting Communication Preferences and Entering Contact Credit Card Information

Activate the Batch Publish Rule

Access the Batch Publish Rules page.

Batch Publish Rules Record Mapping Batch Programs

Message Name: ADVANCED_SHIPPING_NOTICE

Description: Advanced Shipping Notice

Publish Rule Definition Find | View All | First 1 of 3 Last

***Publish Rule ID:** ADVANCED_SHIPPING_NOTICE

***Description:** Advanced Shipping Notice

***Status:** Active

Chunking Rule ID: BUSINESS_UNIT Chunk by Business Unit

Alternate Chunk Table:

Message Options

☒ Create Message Header
☐ Create Message Trailer

Output Format

☒ Message
☐ Flat File
☐ Flat File with Control Record

Batch Publish Rules page

1. Select *Active* Status to activate this publish rule definition for this message to prevent this rule from applying to this message.
2. Select the appropriate Output Format. The PeopleSoft Application Engine program can create either an Extensible Markup Language (XML) message that flows through application messaging architecture or a flat file generated on the PeopleSoft Process Scheduler machine and not published elsewhere. Always select Message as your format when you send data to PeopleSoft systems, and Flat File if you are using EDI.
3. If you want to use message chunking, select a Chunking Rule ID.

See [Chapter 3, “SCM EIP Examples,” Setting Up Chunking, page 97](#).

See Also

PeopleSoft Enterprise Components, “Assigning Publishing Rules,” Assigning Batch Publishing Rules

Processing the Sales Order Acknowledgement EIP

This section discusses processing the Sales Order Acknowledgement EIP.

Pages Used to Process the Sales Order Acknowledgement EIPs

Page Name	Object Name	Navigation	Usage
Publish Outbound Message	IN_RUN_PUB_MSG	Data Exchanges, Publish Outbound Message	Initiate the outbound message publish process for outbound SCM messages that use the batch publish design pattern.
Order Acknowledgement Message Selection Criteria	OM_RUN_OUTBOUND_EC	<ul style="list-style-type: none"> Click the Sales Order Acknowledgement link on the Publish Outbound Message page. Click the Sales Order Change Notice link on the Publish Outbound Message page. Click the Sales Quote Notice link on the Publish Outbound Message page. 	Enter processing options for the Sales Order Acknowledgement, Sales Order Change Notice, and Sales Quote Notice outbound messages. You can select processing options for only one message at a time.

Publishing Outbound Sales Order Acknowledgement Messages

Access the Publish Outbound Message page.

Publish Outbound Message

Run Control ID: ASN
Report Manager
Process Monitor
Run

Language: English

Inventory Messages
☐ Balance Notification
☒ [Advanced Shipping Notices](#)
☐ Interunit Exp Receipts
☐ Internal Location Exp Receipts
☐ Shipping Order Release
☐ Item Status Change
☐ TMS Order Release

Purchasing Messages
☐ Request for Quotation
☒ [Purchase Order Dispatch](#)
☐ Return To Vendor
☐ PO Expected Receipts

Order Management Messages
☐ Sales Order Acknowledgement
☐ Sales Order Change Notice
☐ Sales Quote Notice
☐ Product Price List
☐ Sales Order/Quote Status

Manufacturing Messages
☐ Production Order Update
☐ Item Revision
☐ Replenish Request Dispatch

Billing Messages
☒ [Billing Invoice Notice](#)

Publish Outbound Message page

Click the Sales Order Acknowledgement check box, and click the Sales Order Acknowledgement link to access the Sales Order Acknowledgement page.

See Also

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

Setting Up the Purchase Order Dispatch EIP

This section discusses setting up the Purchase Order Dispatch EIP.

Understanding the Purchase Order Dispatch EIP

This EIP publishes purchase orders and purchase order change requests (change orders) to vendors. This message also supports flat-file processing. The Purchase Order Dispatch EIP meets X.12 EDI requirements of the 850 transaction set. Purchase Order Dispatch is an outbound asynchronous batch publish EIP. If enabled, the system generates a Purchase Order Dispatch EIP transaction message when you run the Publish Outbound Message process. You can specify whether to generate the billing invoice for all sales order shipments in the business unit, sales orders belonging to a specific shipping ID, sales orders for a specific sold to customer, or sales orders for a specific ship to customer.

Before you can publish messages with the Purchase Order Dispatch EIP, you must:

Types of Setup	Steps
Complete PeopleTools setup	Activate the message (PURCHASE_ORDER_DISPATCH).

Types of Setup	Steps
Complete application setup	On the purchase order, specify EDX as the PO dispatch method.
Complete Enterprise Utility setup	Activate the associated batch publish rule and specify the appropriate output for the message (an XML-based message or a flat file).

Pages Used to Set Up the Purchase Order Dispatch EIP

Page Name	Object Name	Navigation	Usage
Batch Publish Rules	EO_MSGPUBATCH	Enterprise Components, Integration Definitions, Batch Publish Rules	Set up publication rules. You must activate a publish rule for the publication messages you create to follow. This rule includes instructions on message chunking, if necessary.
PO Header Details	PO_HDR_DTL	Purchasing, Purchase Orders, Add/Update POs. Click the Header Details link on the Purchase Order page.	Enter or change PO header information online.

Activating Messages

To activate a message for publication:

1. Open an instance of PeopleSoft Application Designer.
2. Select File, Open. The Open Object dialog box appears.
3. In the Definition drop-down menu, select *Message*, enter the message name in the Name field, and click Open. The message you specified opens.
4. Select File, Definition Properties. The Message Properties dialog box appears.
5. On the Message Properties dialog box, select the Use tab.
6. Select the Active check box to activate the message.
7. Click OK, then select File, Save to save the message.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Integration Broker

Setting the Purchase Order Dispatch Method

Access the PO Header Details page.

Maintain Purchase Order			
PO Header Details			
Unit:	US001	PO ID:	NEXT
Vendor:			
PO Details			
Vendor:		PO Date:	10/26/2003
*PO Type:	GEN		
*Billing Location:	US001	Billing Address	
Origin:		<input type="checkbox"/> Tax Exempt	ID: <input type="text"/>
		Letter of Credit ID:	<input type="text"/>
Currency			
Currency Code:	USD	Exchange Rate Detail	Base Currency: USD
Rate Date:	10/26/2003	Exchange Rate:	1.00000000
Rate Type:	CRRNT		
Process Control Option			
<input checked="" type="checkbox"/> Dispatch	*Method:	EDX	
<input type="button" value="OK"/>	<input type="button" value="Cancel"/>	<input type="button" value="Refresh"/>	

PO Header Details page

Select the Dispatch check box to ensure that the system dispatches the PO. Also, select a dispatch Method of *EDX*.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, “Creating Purchase Orders Online”

Activate the Batch Publish Rule

Access the Batch Publish Rules page.

Batch Publish Rules | Record Mapping | Batch Programs

Message Name: PURCHASE_ORDER_DISPATCH

Description: Purchase Order Dispatch

Publish Rule Definition Find | View All First 1 of 2 Last

*Publish Rule ID:	PURCHASE_ORDER_DISPATCH_BU	+ -
*Description:	PO Dispatch by Business Unit	
*Status:	Active	
Chunking Rule ID:	BUSINESS_UNIT	Chunk by Business Unit
Alternate Chunk Table:		

Message Options

☐ Create Message Header

☐ Create Message Trailer

Output Format

☐ Message

☒ Flat File

☐ Flat File with Control Record

Batch Publish Rules page

1. Select *Active* Status to activate this publish rule definition for this message to prevent this rule from applying to this message.
2. Select the appropriate Output Format. The PeopleSoft Application Engine program can create either an Extensible Markup Language (XML) message that flows through application messaging architecture or a flat file generated on the PeopleSoft Process Scheduler machine and not published elsewhere. Always select Message as your format when you send data to PeopleSoft systems, and Flat File if you are using EDI.
3. If you want to use message chunking, select a Chunking Rule ID.

See [Chapter 3, “SCM EIP Examples,” Setting Up Chunking, page 97.](#)

See Also

PeopleSoft Enterprise Components, “Assigning Publishing Rules,” Assigning Batch Publishing Rules

Processing the Purchase Order Dispatch EIP

This section discusses processing the purchase order dispatch EIP.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, “Creating Purchase Orders Online”

PeopleSoft Purchasing 8.8 PeopleBook, “Dispatching and Printing Purchase Orders”

Pages Used to Process the Purchase Order EIP

Page Name	Object Name	Navigation	Usage
Dispatch Purchase Orders	RUN_DISP_POPO005	Purchasing, Purchase Orders, Dispatch POs	Run the PO Dispatch/Print process and dispatch POs, run the Email process, or run the PO Dispatch & Email multiprocess job.
Publish Outbound Message	IN_RUN_PUB_MSG	Data Exchanges, Publish Outbound Message	Initiate the outbound message publish process for outbound SCM messages that use the batch publish design pattern.
PO Dispatch Message Selection Criteria	PO_RUN_POD	Select Purchase Order Dispatch on the Publish Outbound Message page to enable the Purchase Order Dispatch link. Click the Purchase Order Dispatch link to launch the PO Dispatch Message Selection Criteria page.	Launch the Purchase Order Dispatch outbound transaction.

Dispatching Purchase Orders

Access the Dispatch PO page.

Dispatch Purchase Orders

Run Control ID: PODTL

Report Manager Process Monitor Run

Language: English Specified Recipient's

Process Request Parameters

Business Unit: US004 To:

PO ID: Select Purchase Order

Contract SetID: SHARE

Contract ID:

Release:

From Date: 01/01/2000

Through Date: 06/14/2000

Vendor ID:

Buyer:

Fax Cover Page:

Statutes to Include

☒ Approved
☐ Dispatched
☐ Pending Cancel

Dispatch Methods to Include

☒ Print
☒ FAX
☒ EDX
☒ E-Mail
☒ Phone

Miscellaneous Options

*Chartfields: Valid Chartfields

Change Orders: UnChanged Orders

☐ Print Changes Only
☒ Print PO Item Description

☐ Test Dispatch
☐ Print Duplicate

☐ Print Copy
☐ Print BU Comments

Sort By: Line No.

Dispatch Purchase Orders

Ensure that the PO to be dispatched is included in your selection criteria. Click *Run* to stage POs for dispatch.

Publishing Outbound Purchase Order Messages

Access the Publish Outbound Message page.

Data Def Maint

Transaction Type: PO Inbound Sales Order - 850 Unit: Search

☐ Queue Based

☒ Stage Table Status: Reference:

Stage Table Data Customize | Find | View All | First 1-2 of 2 Last

Stage Data	Reference	Publish Data	Date Time	Process Instance
Status	EIP Control ID	Transaction Type	Description	User
1 Complete	12854701376384770000000001	PO	Inbound Sales Order - 850	VP1
2 Error	16536454359569070000000001	PO	Inbound Sales Order - 850	VP1

Publish Outbound Message page

Click the Purchase Order Dispatch check box, and click the Purchase Order Dispatch link to access the Purchase Order Dispatch page.

Data Def Maint

Transaction Type: PO Inbound Sales Order - 850 Unit: Search

☐ Queue Based

☒ Stage Table Status: Reference:

Stage Table Data Customize | Find | View All | First 1-2 of 2 Last

Stage Data	Reference	Publish Data	Date Time	Process Instance
Status	EIP Control ID	Transaction Type	Description	User
1 Complete	12854701376384770000000001	PO	Inbound Sales Order - 850	VP1
2 Error	16536454359569070000000001	PO	Inbound Sales Order - 850	VP1

PO Dispatch Message Selection Criteria

1. Select BU or Vendor as a Selection Type.
2. If you select BU, the BU Sel Type fields are enabled, and you can select *All BUs* or a *1 Bus Unit*. If you select Vendor, the Vendor Selection Type fields are enabled, and you can select *1 Vendor* or *All Vendor*.

See Also

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

Setting Up the Customer EIP

This section discusses the Customer EIP setup.

Understanding the Customer EIP

This EIP syncs customer data with an external system. Customer can be used inbound or outbound, and is an asynchronous EIP. If enabled, the system generates a customer message when you save the customer component. Customers integrates with PeopleSoft CRM and other external systems.

Before you can publish or subscribe to messages with the Customer EIP, you must:

Types of Setup	Tasks
Complete PeopleTools setup	Activate the message (CUSTOMER_SYNC and CUSTOMER_FULLSYNC). Activate the message channel.
Complete application setup	None for this EIP.
Complete Enterprise Utility setup	None for this EIP.

Pages Used to Set Up the Customer EIP

Page Name	Object Name	Navigation	Usage
Message Monitor	AMM_OVERVIEW	PeopleTools, Integration Broker, Monitor, Monitor Message	Use to add message channels

Activating Messages

To activate a message for publication:

1. Open an instance of PeopleSoft Application Designer.
2. Select File, Open. The Open Object dialog box appears.
3. In the Definition drop-down menu, select *Message*, enter the message name in the Name field, and click Open. The message you specified opens.
4. Select File, Definition Properties. The Message Properties dialog box appears.
5. On the Message Properties dialog box, select the Use tab.
6. Select the Active check box to activate the message.
7. Click OK, then select File, Save to save the message.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Integration Broker

Activating the Message Channel

To activate the message channel:

1. Select PeopleTools, Application Designer.
2. Select File, Open.
3. Select the Object Type of Message Channel, and enter the message 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.

You can also use the Application Message Monitor to view the status of the message channel.

7. Select File, Save to save the Message Channel file.

Processing Customer EIPs

This section discusses processing Customer EIPs.

Pages used to Process Customer EIPs

Page Name	Object Name	Navigation	Usage
General Information - General Info	CUST_GENERAL1	Customers, Customer Information, General Information, General Info	Add or review a customer's name, level information, and assign associated roles.

Processing Outbound Customer Messages

To sync customer data:

1. Access the Customer component.
2. Make changes, and save the component.
3. The system automatically sends an incremental message to the external system using the Customer EIP.

Note. You can view the transaction in the Application Messaging queue.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Integration Broker

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

Setting Up the Billing Invoice EIP

This section discusses setting up the Billing Invoice EIP.

Understanding the Billing Invoice EIP

This EIP sends invoices to customers. The Billing Invoice EIP meets X.12 EDI requirements of the 856 transaction set. Billing Invoice is an outbound asynchronous batch publish EIP. If enabled, the system generates an Billing Invoice EIP transaction message when you run the Finalize Bills COBOL process (BIIVC000).

Before you can publish messages with the Billing Invoice EIP, you must:

Types of Setup	Steps
Complete PeopleTools setup	Activate the message (BILLING_INVOICE_NOTICE).
Complete application setup	Associate customers receiving Billing Invoice EIP messages with a preferred communication value of <i>XML Only</i> or <i>XML and Print</i> , and a document code of <i>Invoice</i> . The system provides these values as a default to the Standard Billing - Address Info page when you create a bill for this customer.
Complete Enterprise Utility setup	Activate the associated batch publish rule and specify the appropriate output for the message (an XML-based message or a flat file).

See Also

PeopleSoft Working with Customers and Orders 8.8 PeopleBook, “Maintaining Contacts,” Selecting Communication Preferences and Entering Contact Credit Card Information

PeopleSoft Enterprise Components, “Assigning Publishing Rules,” Assigning Batch Publishing Rules

Pages Used to Process Billing Invoices

Page Name	Object Name	Navigation	Usage
Batch Publish Rules	EO_MSGPUBATCH	Enterprise Components, Integration Definitions, Batch Publish Rules	Set up publication rules. You must activate a publish rule for the publication messages you create to follow. This rule includes instructions on message chunking, if necessary.
Contact	CONTACT	Customers, Contact Information	Maintain information about each contact.
Contact Customer	CONTACT_CUST_PAGE	Click the Contact Customer Information link on the Contact page.	Build the relationship between the contact and the different customer IDs the contact serves or is associated with. If the contact is only associated with one customer, enter that customer on this page. If the contact is a broker, for example, use this page to establish the relationships with the multiple customers that the broker serves. Set up security options on the Self Service Security tab.
Contact Additional Info	CONTACT_ADDTL_INFO	Click the Additional Info link for a contact on the Contact Customer page.	Enter the preferred communication method for the selected document.

Activating Messages

To activate a message for publication:

1. Open an instance of PeopleSoft Application Designer.
2. Select File, Open. The Open Object dialog box appears.
3. In the Definition drop-down menu, select *Message*, enter the message name in the Name field, and click Open. The message you specified opens.
4. Select File, Definition Properties. The Message Properties dialog box appears.
5. On the Message Properties dialog box, select the Use tab.
6. Select the Active check box to activate the message.
7. Click OK, then select File, Save to save the message.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Integration Broker

Activate the Batch Publish Rule

Access the Batch Publish Rules page.

Batch Publish Rules page

1. Select *Active* Status to activate this publish rule definition for this message.
2. Select the appropriate Output Format. The PeopleSoft Application Engine program can create either an Extensible Markup Language (XML) message that flows through application messaging architecture or a flat file generated on the PeopleSoft Process Scheduler machine and not published elsewhere. Always select Message as your format when you send data to PeopleSoft systems, and Flat File if you are using EDI.
3. If you want to use message chunking, select a Chunking Rule ID.

See Also

PeopleSoft Enterprise Components, “Assigning Publishing Rules”

Chapter 3, “SCM EIP Examples,” Setting Up Chunking, page 97

Verifying Contacts

You must ensure that the customer you are interacting with has a contact set up to accept EDI transmissions, and that the contact is a Ship to Contact.

Access the Contact page using the Customer ID in correction mode.

Contact

SetID: SHARE Contact ID: 10

Contact Information

Find | View All First 1 of 1 Last

*Effective Date:

01/01/1990

*Status:

Active

+

*Name:

Jeffreys,Jenny

*Contact Flag:

External

External Contact

Title:

Manager

Email ID:

Salutation Code:

Salutation:

*Preferred Communication:

Call

Call

Language Code:

English

Person ID:

Contact Customer Information Contact Phone and Type User Profile

Contact Page

Access the Contact Customer page using the Contact Customer Information link.

Contact Customer

SetID: SHARE Contact ID: 10 Jeffreys,Jenny Effective Date: 01/01/1990

Link Contact to Customer

Customize | Find | View All | First 1-3 of 3 Last

Customer

Self Service Security

*Customer SetID	*Customer ID	Customer Name	Location		Additional Info	Primary Bill To	Primary Ship To	Primary Sold To		
SHARE	1018	National Institute of Health Science	1	Main Address	<a>Additional Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
SHARE	1020	Department of Health & Human Services	1	Granting Office	<a>Additional Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
SHARE	FRA01	ITN Wholesale, France	1	Main	<a>Additional Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-

Contact Customer page

Click the Primary Bill To check box to receive the proper invoice notifications.

Click the Additional Info link corresponding to the appropriate customer.

Contact Additional Info

SetID: SHARE Contact: 10 Jeffreys, Jenny Effective Date: 01/01/1990
 Customer SetID: SHARE Customer: 1018 National Institute of Health Science

Credit Card Information										Customize	Find	View All	First	1 of 1	Last
Card Type	Card Name	Card Number	Primary Card	First Name	Last Name	Expiration Month	Expiration Year	Address Sequence Number	Credit Card Address						
			<input type="checkbox"/>												

Documentation				Customize	Find	View All	First	1 of 1	Last
Document Code	Preferred Communication	Number of Copies							
INVC	R	1							

Contact Additional Info page

Under the Documentation group box, make sure the Document Code is *INVC* (invoice), and Preferred Communication is *R* (XML and Print) or *I* (XML only).

See Also

PeopleSoft Working with Customers and Orders 8.8 PeopleBook, “Maintaining Contacts,” Selecting Communication Preferences and Entering Contact Credit Card Information

Processing Billing Invoice EIPs

This section discusses processing Billing Invoice EIPs.

See Also

PeopleSoft Billing 8.8 PeopleBook, “Processing EDI Transactions in PeopleSoft Billing”

Pages Used to Process the Billing Invoice EIP

Page Name	Object Name	Navigation	Usage
Publish Outbound Message	IN_RUN_PUB_MSG	Data Exchanges, Publish Outbound Message	Initiate the outbound message publish process for outbound SCM messages that use the batch publish design pattern.
Billing Invoice Notice Message Selection Criteria	BI_INVMSG_SEL_PNL	Select Billing Invoice Notice on the Publish Outbound Message page to enable the Billing Invoice Notice link. Click the Billing Invoice Notice link to launch the Billing Invoice Notice Message Selection Criteria page.	Launch the Billing Invoice Notice outbound transaction.

Publishing Billing Invoices

Access the Publish Outbound Message page.

Publish Outbound Message

Run Control ID: ASN Report Manager Process Monitor Run

Language: English

Inventory Messages	Purchasing Messages	Order Management Messages
<input type="checkbox"/> Balance Notification	<input type="checkbox"/> Request for Quotation	<input type="checkbox"/> Sales Order Acknowledgement
<input checked="" type="checkbox"/> <u>Advanced Shipping Notices</u>	<input checked="" type="checkbox"/> <u>Purchase Order Dispatch</u>	<input type="checkbox"/> Sales Order Change Notice
<input type="checkbox"/> Interunit Exp Receipts	<input type="checkbox"/> Return To Vendor	<input type="checkbox"/> Sales Quote Notice
<input type="checkbox"/> Internal Location Exp Receipts	<input type="checkbox"/> PO Expected Receipts	<input type="checkbox"/> Product Price List
<input type="checkbox"/> Shipping Order Release		<input type="checkbox"/> Sales Order/Quote Status
<input type="checkbox"/> Item Status Change		
<input type="checkbox"/> TMS Order Release		

Manufacturing Messages	Billing Messages
<input type="checkbox"/> Production Order Update	<input checked="" type="checkbox"/> <u>Billing Invoice Notice</u>
<input type="checkbox"/> Item Revision	
<input type="checkbox"/> Replenish Request Dispatch	

Publish Outbound Message page

Click the Billing Invoice Notice check box, and click the Billing Invoice Notice link to access the Billing Invoice Notice Selection Criteria page.

Billing Invoice Notice Message Selection Criteria

Run Control ID: POD
 Report Manager
 Process Monitor
 Run

Language: English

Billing Invoice Outbound Message
Find | View All
 First 1 of 1 Last

Request ID: BI
 + -

Description: Billing Invoice

Business Unit: US001
 🔍

OK Cancel

Billing Invoice Notice Message Selection Criteria

Enter a Request ID, Description, and Business Unit.

See Also

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

Setting Up Chunking

Chunking is an optional step with batch publish messages.

To set up chunking you:

- Associate chunking rules to publication rules.
- Map nodes to a chunk rule.
- Assign the business units to a chunk rule.
- Specify the OnRoute PeopleCode.

Pages Used to Set Up Chunking

Page Name	Object Name	Navigation	Usage
Add Nodes to Chunk Rule	EO_ADNODECHUNK_PNL	Enterprise Components, Integration Definitions, Map Chunking Rules, Node to Chunk Rule	Map PeopleSoft Application Messaging nodes to chunking rules. (A node is a PeopleTools object that represents a publishing or subscribing system on the message network. A message node often relates to an application server or database name.)

Associating Chunking Rules to Publication Rules

If the data you're transmitting won't fit in a single message, or if you want to send different parts of the message to different target systems, set up the rules to chunk the message and associate it with your publish rule. The business unit and setID chunking rules are standard in PeopleSoft applications, but you can customize your own chunking rules.

To associate a chunking rule to the publication rule:

1. Access the Batch Publish Rules page.
2. Use the Publish Rule ID field to select the name of the message for which you're setting up rules.
3. Select a status of *Active*.
4. In the Chunking Rule ID field, select the name of the field by which you want to chunk the message. The message you publish is routed based on this field.
5. In the Alternate Chunk Rule ID field, select an additional field by which to chunk the message, if required.
6. Save and repeat the process for each required message rule.

Note. Some SCM application use page specific chunking rules.

See Also

PeopleSoft Enterprise Components, "Assigning Publishing Rules," Setting Up Message Chunking

Mapping Nodes to Chunk Rules

A node is a PeopleTools object that represents a publishing or subscribing system on the message network. A message node often relates to an application server or database name.

To map nodes to a chunk rule:

1. Access the Add Nodes to Chunk Rule page.
2. In the Add column, select the check box next to the nodes that you defined earlier.
3. Click the Save button to call up the Add Chunk Values column

Add Chunk Values

In this column, click the Add button to open the Quick Map page for the message that you defined earlier.

See Also

PeopleSoft Enterprise Components, "Assigning Publishing Rules," Setting Up Message Chunking

Set Up the OnRoute PeopleCode

To set up the OnRoute PeopleCode:

1. Open up an instance of PeopleSoft Application Designer.
2. Select File, Open.
3. In the Definition drop-down menu, select Message and enter the message name in the Name field.

4. Click Open.

The system opens the Message Definition.

5. Select View, View PeopleCode.

6. From the PeopleCode Event drop-down menu, select OnRouteSend.

The system displays the PeopleCode editor.

The following is an example of OnRoute Send PeopleCode: Declare

```
Function GetNodes PeopleCode FUNCLIB_INEIP_PUBLISH_ROUTE_PC FieldFormula;  
( " " );;
```

7. Click Save to save the Message Definition.

PART 3

Using Electronic Data Interchange

Chapter 4

Using Electronic Data Interchange Messaging

Chapter 5

Understanding the Differences Between the 7.5 Flat File EDI Processes and the 8.X Flat File EDI Processes

CHAPTER 4

Using Electronic Data Interchange Messaging

This chapter provides the following:

- Overview of electronic data interchange (EDI).
- Overview of the inbound process utilizing flat files.
- Overview of the outbound process utilizing flat files.
- Overview of the inbound and outbound processing utilizing the latest industry technology (XML messaging).
- Procedure on how to set up EDI transactions using flat files.
- Procedure on how to set up EDI transactions using XML messages.
- List of EDI transactions supported by PeopleSoft.
- File layout definition information for the EDI Transactions.

Note. If you are upgrading from PeopleSoft 7.5 to PeopleSoft 8.X and using EDI with flat files, please see the additional information documented in the Understanding the Differences Between the 7.5 Flat File EDI Processes and the 8.X Flat File EDI Processes chapter. PeopleSoft believes the information contained in that chapter will be most helpful to you.

See Also

Chapter 5, “Understanding the Differences Between the 7.5 Flat File EDI Processes and the 8.X Flat File EDI Processes,” page 125

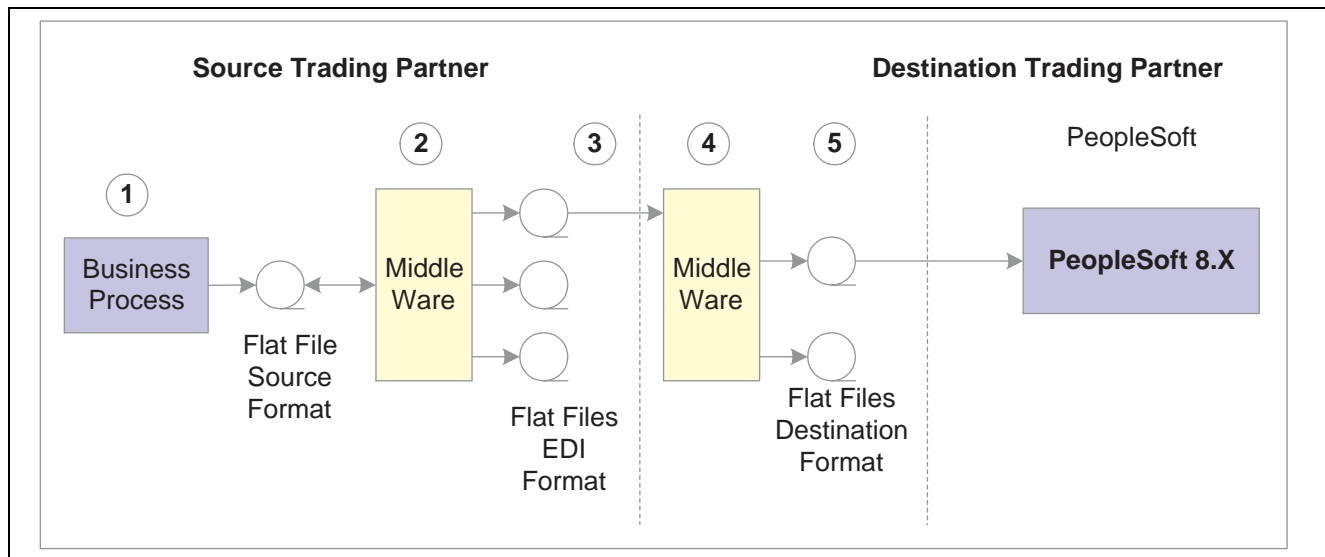
Understanding Electronic Data Interchange

Electronic Data Interchange (EDI) is a standard means of exchanging data between companies so they can transact business electronically. For example, using EDI a company can submit an order to a vendor, and the vendor can acknowledge and fulfill the order without paper changing hands or any contact between company representatives.

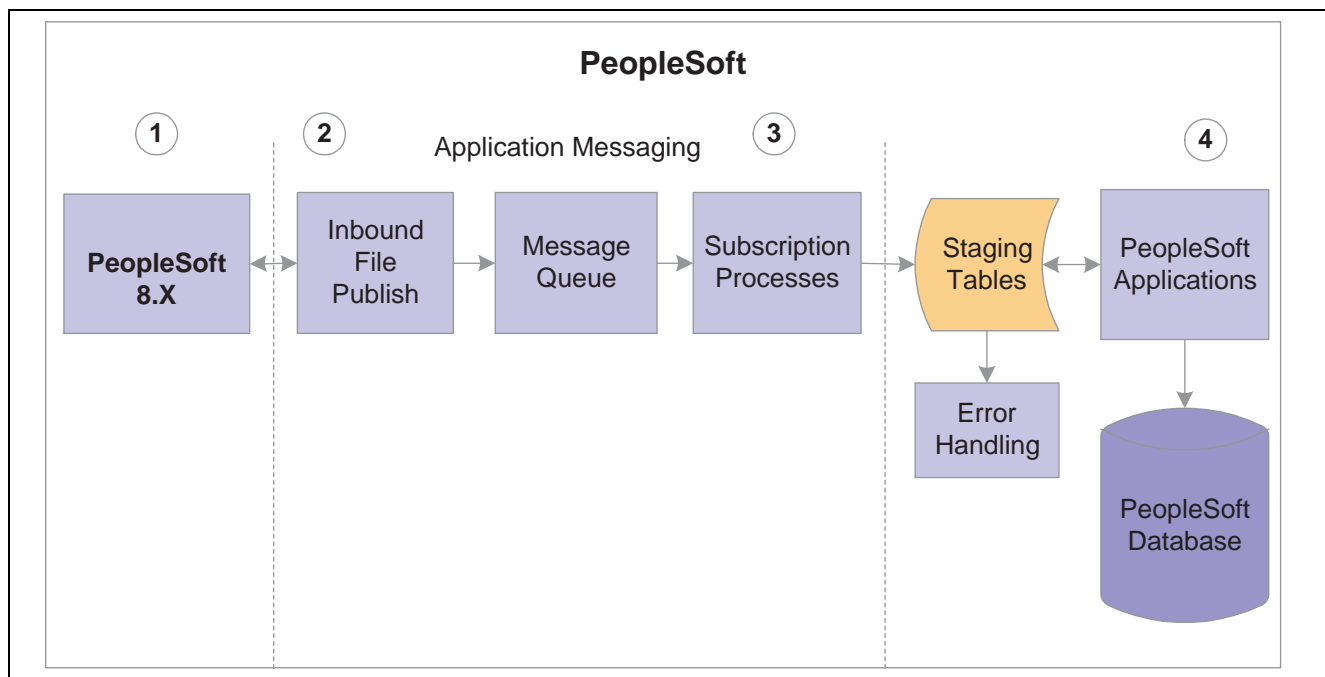
EDI provides a standard format for transaction data, allowing trading partners to communicate in a common language.

Understanding the Inbound Process Utilizing Flat Files

This diagram depicts the inbound process flow utilizing flat files:



Inbound Flat File EDI Transaction Process (1 of 2)



Inbound Flat File EDI Transaction Process (2 of 2)

EDI transactions can be processed in a multitude of ways from a source trading partner to a destination trading partner. In an attempt to make the PeopleSoft process clear, described below is a very basic EDI transaction process flow for PeopleSoft 8.X. Keep in mind that there can be many variations on this theme. This process flow is also depicted in the diagram above.

Inbound Flat File EDI Transaction Process PeopleSoft 8.X

To process inbound flat file EDI transactions:

1. Source trading partner initiates a process that generates a flat file containing EDI transactions in the sources format.
2. The file is passed on to a middleware translation tool that generates an outbound file in the appropriate EDI format (X.12, EDIFACT, and so forth). Depending on the relationship with various trading partners data mapping transformations may occur at this point to meet trading partner specific mapping requirements. The formatted file is then sent on to the source trading partners VAN.

A VAN is a private network used for exchanging EDI transactions. However, networks can also be the Internet, a dedicated link, or a sole-source provider.

3. Source trading partner's VAN then distributes the flat file to the destination trading partner's VAN.

The source trading partner and destination trading partner could be using the same VAN.

4. Destination trading partner receives the flat file from the VAN. A middleware tool is used to convert the source file into the appropriate PeopleSoft Business Document file format. This process includes a conversion from the sources EDI format (X.12, EDIFACT, and so forth). Additional translation requirements may be necessary at this point if the source trading partner is sending a generic file that does not meet the destination trading partners data requirements.

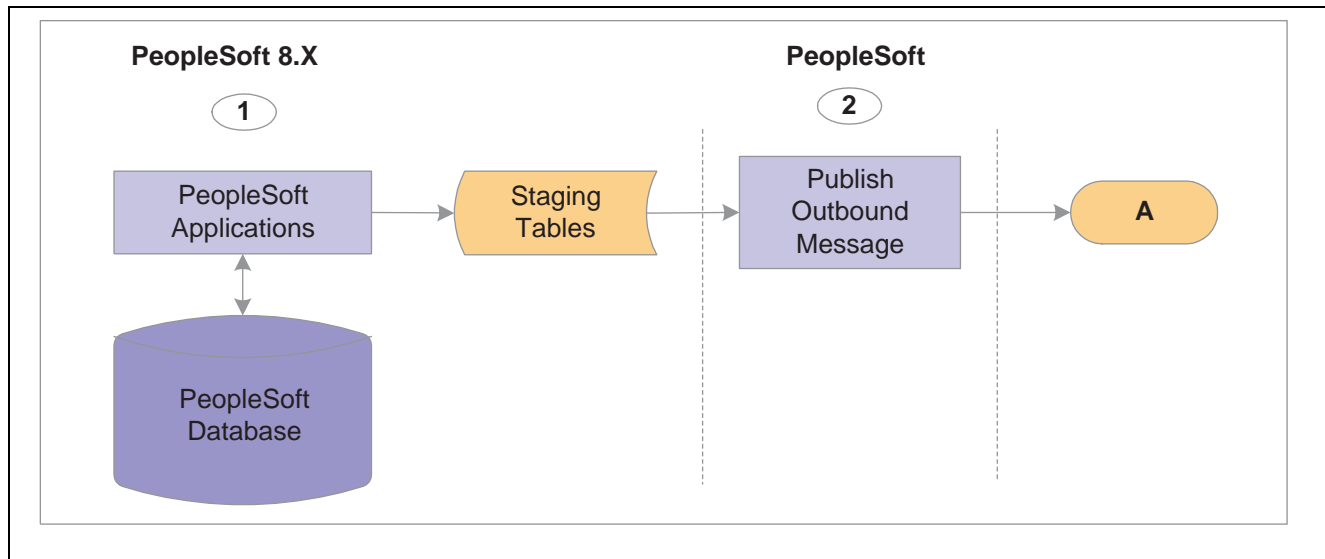
5. Destination trading partner performs the Inbound File Publish process that changes the flat file transactions to application messages and then writes them to a message queue.

The Inbound File Publish process inputs the electronic data flat file, translates the data using the PeopleSoft File Layout Definition and rules, and then publishes an application message.

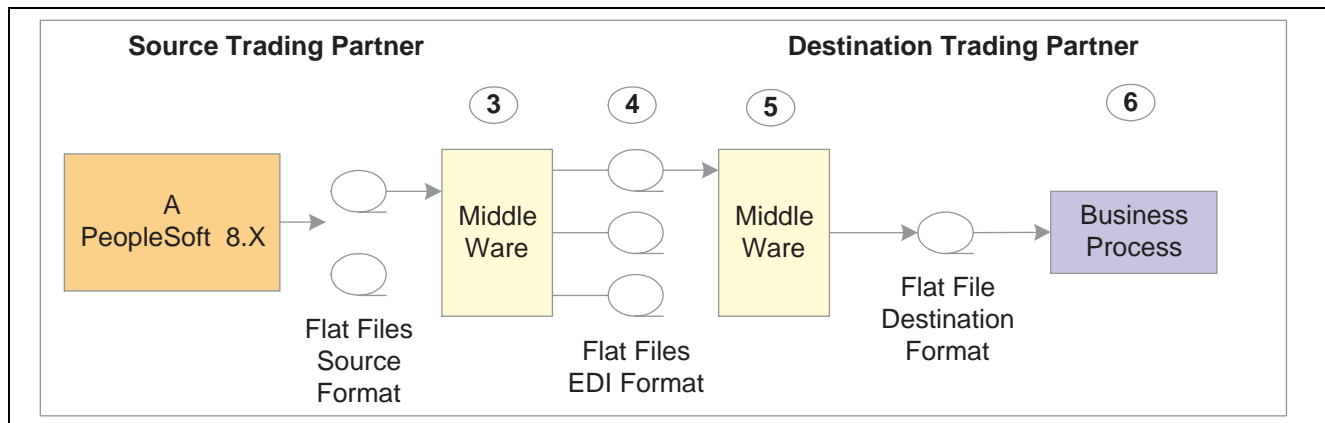
6. Different PeopleSoft Application Messaging subscription processes are automatically executed that retrieve the application messages from the message queue and then load the information into staging tables.
7. Different PeopleSoft applications initiate processes that read the transactions from the staging tables, perform validations, and load the data to the actual PeopleSoft application database tables.
8. If any errors are found in the transactions error handling is available to fix the errors and to resubmit the transactions.

Understanding the Outbound Process Utilizing Flat Files

This diagram depicts the outbound process flow utilizing flat files:



Outbound Flat File EDI Transaction Processing PeopleSoft 8.X (1 of 2)



Outbound Flat File EDI Transaction Processing PeopleSoft 8.X (2 of 2)

Outbound EDI Transaction Processing PeopleSoft 8.X

To process outbound EDI transactions:

1. Source trading partner initiates a PeopleSoft application process that will retrieve the transactional data from the PeopleSoft application database tables and then load those EDI transactions into PeopleSoft staging tables or prepares the data so it can be picked up by the Publish Outbound Message process.
2. Source trading partner performs the Publish Outbound Message process that retrieves the transactions from the staging tables or application tables and creates a flat file. The flat file is then sent to the VAN.

The Outbound File Publish process reads the staging tables, translates the data using the PeopleSoft File Layout Definition and rules, and generates a flat file.

3. The Outbound EC Agent process reads the staging tables, translates the data using the PeopleSoft Business Document layout, and generates a flat file. The file is passed on to a middleware translation tool that generates an outbound file in the appropriate EDI format (X.12, EDIFACT, and so forth). Depending on the relationship with various trading partner's, data mapping transformations may occur at this point to meet trading partner specific mapping requirements. The formatted file is then sent on to the source trading partners VAN.

4. Source trading partner's VAN then distributes the flat file to the destination trading partner's VAN.
5. Destination trading partner receives the flat file from the VAN. A middleware tool is used to convert the source file into the format required for the destination trading partner's business application software.
6. Destination trading partner loads the flat file into their business application system.

Understanding Inbound and Outbound Processing Utilizing the Latest Industry Technology (XML Messaging)

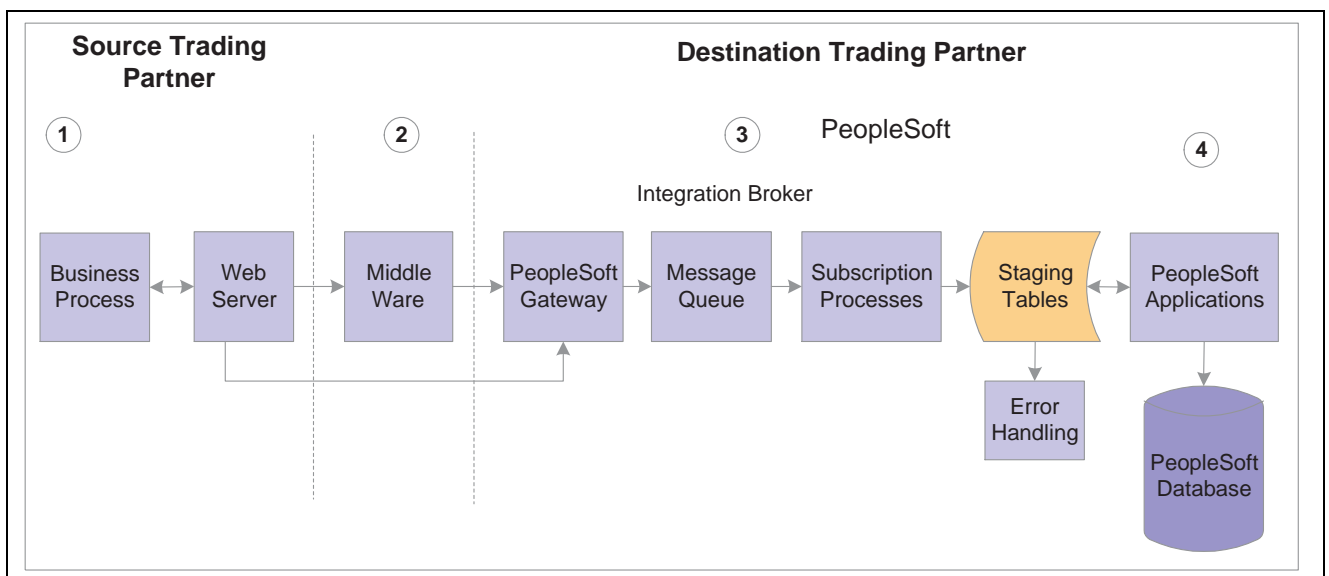
In a perfect world, the source trading partner and the destination trading partner would use the exact same format for the XML messages—EDI transactions—they exchange between themselves whether the messages are inbound or outbound. In this case, no mapping of the XML messages to the other trading partners format would be required. XML messages would be exchanged between trading partners utilizing their web servers.

In a more realistic scenario, trading partners would still use XML messages to exchange information between themselves but one side would have to perform a transformation of the XML messages using their “middleware” product such as that traditionally provided by VANs or, starting with PeopleSoft 8.4, using the mapping capabilities provided with the PeopleSoft Integration Broker.

In either of the scenarios above the processing of EDI transactions utilizing XML messages eliminates a lot of system processing and is basically a more direct exchange of information. The XML message method provides for quicker turn around of information between trading partners and reduces logistics and control issues inherent in flat file processing.

Understanding the Inbound Process Utilizing Latest Technology

This diagram depicts the inbound process utilizing the latest technology:



Inbound Process Utilizing the Latest Industry Technology

To process inbound transactions:

1. Source trading partner publishes a message. If one of the industry standard connectors compatible with PeopleSoft's Application Messaging Gateway (Integration Broker in 8.4) is being used and the XML message is compatible with PeopleSoft's XML format then it may be sent directly from the source site's gateway to the destination's (PeopleSoft system) gateway. If a compatible connector is not available then communications must be made using a middleware vendor that provides this connector. Also, if the message is not in PeopleSoft's XML format a transformation (data mapping) to PeopleSoft's XML format must be made either at the source site or at the destinations site.

Note. Transformations to and from the trading partner formats can be performed using the PeopleSoft Integration Broker.

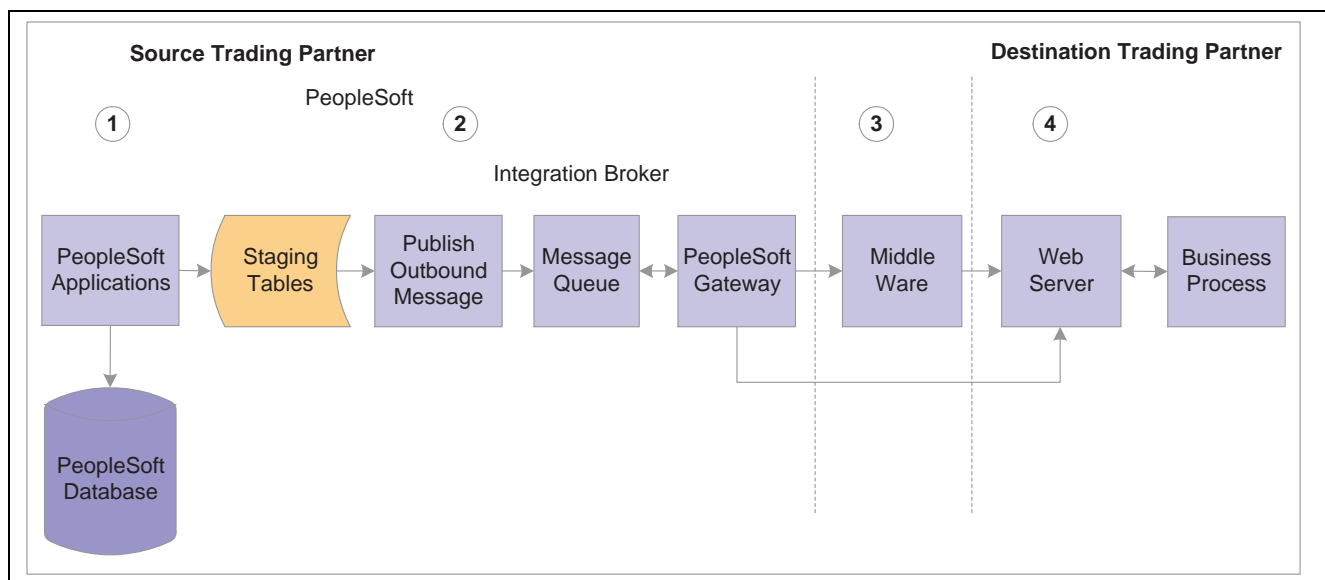
2. If a middleware transformation is being performed, transform the source XML format to the destination PeopleSoft systems XML format.

Note. Many middleware products can convert from standard EDI formats (X.12 or EDIFACT) to XML and then post XML message to the PeopleSoft system. When using these products you can still eliminate the use of flat files coming in and out of the PeopleSoft system even when working with trading partners that are not ready to move to the new technology. When utilizing this approach flat files would still be used between the middleware product and the trading partner.

3. Post message to PeopleSoft Integration Broker—transaction is posted to the PeopleSoft gateway. PeopleSoft subscription processes are automatically executed that retrieve the application messages from the message queue and then load the information into staging tables.
4. Different PeopleSoft applications initiate processes that read the transactions from the staging tables and load the data to the actual PeopleSoft application database tables.

Understanding the Outbound Process Utilizing Latest Industry Technology

This diagram depicts the outbound process utilizing the latest industry technology:



Outbound Process Utilizing Latest Industry Technology

To process outbound transactions:

1. Source trading partner initiates a PeopleSoft application process that will retrieve the transactional data from the PeopleSoft application database tables and then load those EDI transactions into PeopleSoft staging tables or prepares the data so it can be picked up by the Publish Outbound Message process.
2. Source trading partner performs the Publish Outbound Message process that retrieves the transactions from the staging tables or application tables and publishes a message.

If one of the industry standard connectors compatible with PeopleSoft's Integration Broker is being used and the destinations XML format is compatible with PeopleSoft's XML format then it may be sent directly from the source site to the destination's gateway. If a compatible connector is not available then communications must be made using a middleware vendor that provides this connector. Also, if the message is not in PeopleSoft's XML format a transformation (data mapping) "from" PeopleSoft's XML format must be made either at the source site, a middleware site or at the destinations site.

Note. Transformations to and from the trading partner formats can be performed using the Integration Broker. In this situation the Integration Broker can perform the transformation and then with the correct connector can post directly to the destination trading partners system.

3. If a middleware transformation is being performed, transform the PeopleSoft XML format to the destination's XML format.

Note. Many middleware products can convert from PeopleSoft's XML format to standard EDI formats (X.12 or EDIFACT) required by trading partners. When using these products you can still eliminate the use of flat files coming in and out of the PeopleSoft system even when working with trading partners that are not ready to move to the new technology. When utilizing this approach flat files would still be used between the middleware product, VAN and the trading partner.

4. If a middleware connector is required the middleware product will post to the destinations gateway or will create a flat file to be received by the trading partner through their VAN.

Setting Up EDI Transactions Using XML Messages

Before EDI transactions can be successfully processed several setup steps are required. These setup steps fall into two specific areas:

- PeopleSoft application specific setup. Depending on the EDI transactions you are processing you may need to access the particular PeopleSoft applications such as, PeopleSoft Inventory or PeopleSoft Purchasing and perform the individual application setup required for the EDI transactions.
- PeopleSoft Application Messaging setup. PeopleSoft provides many widely used industry standard EDI transactions. These application messages and some of the other objects used to support messaging are delivered inactive so that they do not have to be touched if not used. They will need to be activated if a message is to be utilized.

To set up an EDI transaction using XML messages:

1. If trading partner is not delivering data in PeopleSoft's XML format, then set up mapping software to transform the trading partners format to PeopleSoft's format.

See *PeopleTools PeopleBook: PeopleSoft Integration Broker*

2. Identify the connector to be used to communicate between gateways.

If one of the industry standard connectors compatible with PeopleSoft's Integration Broker is being used then messages may be sent directly from the source site to the destination's gateway. If a compatible connector is not available custom connectors can be developed or communications can be completed using a middleware vendor that provides this connector.

3. Perform application specific setup.

The table below in the section List of EDI Transactions Supported by PeopleSoft in this chapter identifies where to find the documentation explaining application specific setup instructions for each EDI transaction.

See [Chapter 4, "Using Electronic Data Interchange Messaging," List of EDI Transactions Supported by PeopleSoft, page 111.](#)

4. Configure the Integration Gateway.

In 8.4 the Integration Gateway is used as the gateway for all messages in and out of the PeopleSoft system. Detailed definitions and setup information can be found in the PeopleTools Integration Broker PeopleBook.

5. Perform Application Messaging setup.

Nodes, channels, and messages must be set up before you can begin processing inbound or outbound transactions. Subscription processes must be set up before you can begin processing inbound transactions.

- a. Set up nodes.

A node must be set up for each destination gateway that will be addressed when sending out messages or for each source gateway that will be sending messages. If communications are all going in and out of a single middleware system then only one node needs to be setup. If messages are to be sent directly to a trading partner from the PeopleSoft system then a separate node will need to be setup for each trading partner.

A transaction must also be set up for each message for each node that is to send or receive that message. Example transaction definitions have been prepackaged on the local node (PSFT_EP) for reference.

A transaction must be set up on a node definition for each message used by that node. For inbound messages setup an Inbound Asynchronous transaction on the source's node if receiving an XML message directly from the source node. If using the Inbound File Publish utility to load a flat file you do not need to setup a transaction on the source node because you are not receiving a message directly from that node. But, when you run the Inbound File Publish utility you are publishing an XML message from your local node so you do need to setup a Outbound Asynchronous transaction on your local node for any messages coming from flat files.

For outbound messages set up an Outbound Asynchronous transaction on node definitions for nodes receiving the message. The exception to this rule is when using flat files. When you set the flat file option on the batch publish rule for a specific message the flat file is generated directly without ever generating an XML message. For that reason you do not need to setup a transaction definition for outbound messages that are going to flat files.

- b. Activate messages.

PeopleSoft provides message definitions for each EDI transaction. You must activate the message in order to use it.

- c. Activate the subscription processes.

Subscription processes are processes that are automatically executed by the Integration Broker when an inbound message is received. PeopleSoft provides subscription processes for each message. You must activate the appropriate subscription process for each message.

Note. For names of messages, subscription processes, and channels for specific EDI transactions see table below in the section List of EDI Transactions Supported by PeopleSoft in this chapter.

6. Set up Batch Publish Rules for outbound messages.

The Publish Outbound Message process uses the batch publish rules to identify information about the transaction being published. Batch publish rules have been prepackaged to work with each outbound message that are initiated using the Publish Outbound Message process. These rules must be activated before they can be used. When sending transactions via XML set the output format to XML on the batch publish rule.

The table in the section List of EDI Transactions Supported by PeopleSoft in this chapter identifies names of batch publish rules associated with outbound EDI messages.

Note. The Batch Publish Rules optionally utilize a feature called “Chunking”. Chunking gives you the ability you to break up messages based on unique field values within a message. For example, if you were sending purchase orders directly to a trading partner without going through a middleware system then you would need to make sure that only that vendors transactions went on the message going to that trading partner. If chunking was not used and you had separate nodes setup for each of your trading partners then, every transaction, would go to every trading partner. Chunking provides a mechanism to make sure that messages contain a single trading partners information and allows that message to be routed to the specific trading partners node.

Realize that when using a single middleware product you are usually using a single node to identify that products destination URL so chunking is not required. In this case, all trading partner transactions can go on a single message as the segregation and routing of the message by trading partner is performed by the middleware product.

7. Setup Publish/Subscribe services on the Application Server.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Broker

Chapter 4, “Using Electronic Data Interchange Messaging,” List of EDI Transactions Supported by PeopleSoft, page 111

PeopleSoft Enterprise Components, “Enterprise Integration”

List of EDI Transactions Supported by PeopleSoft

This table summarizes the EDI inbound or outbound transactions, their associated technologies, related applications, application specific PeopleBook information, and application messaging setup information:

Note. In the I/O Column below, I = inbound and O = outbound.

EDI Transaction	I/O	Technology	PeopleSoft Application	PeopleBook Reference (Application Setup)	Application Messaging Information
Advanced Shipping Notice (X.12 856)	O	Application message Flat file (FLO)	Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Creating Shipping Documentation”. See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Order Fulfillment Processing,” Understanding Enterprise Integration Points for Fulfillment Transactions.	File Layout Definition: ADVANCED_SHIPPING_NOTICE Message Name: ADVANCED_SHIPPING_NOTICE Channel Name: ADVANCED_SHIPPING_NOTICE Subscription Name: N/A Batch Publish Rule: <ul style="list-style-type: none">• ADVANCED_SHIPPING_NOTICE• ASN_SETID_SHIPTO• ASN_SETID_SOLDTO File Rule: N/A
Advanced Shipping Receipt (X.12 856)	I	Application message Flat file (FLO)	Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Receiving Shipments”. See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.	File Layout Definition: ADVANCED_SHIPPING_RECEIPT Message Name: ADVANCED_SHIPPING_RECEIPT Channel Name: ADVANCED_SHIPPING_NOTICE Subscription Name: AdvancedShippingReceipt Batch Publish Rule: N/A File Rule: SCM_INBOUND_EDI

EDI Transaction	I/O	Technology	PeopleSoft Application	PeopleBook Reference (Application Setup)	Application Messaging Information
Billing Invoice (X.12 810)	O	Application message Flat file (FLO)	Billing	See <i>PeopleSoft Billing 8.8 PeopleBook</i> , “Processing EDI Transactions in PeopleSoft Billing”.	File Layout Definition: BILLING_INVOICE_NOTICE Message Name: BILLING_INVOICE_NOTICE Channel Name: BILLING_INVOICE Subscription Name: N/A Batch Publish Rule: BILLING_INVOICE_NOTICE File Rule: N/A
Interunit Expected Receipt (X.12 943)	O	Application message Flat file (FLO)	Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Order Fulfillment Processing,” Understanding Enterprise Integration Points for Fulfillment Transactions. See Part 4, “Integrating to Warehouse Management Systems,” page 137 .	File Layout Definition: INTERUNIT_EXPECTED_RECEIPT Message Name: INTERUNIT_EXPECTED_RECEIPT Channel Name: INTERUNIT_EXPECTED_RECEIPT Subscription Name: N/A Batch Publish Rule: INTERUNIT_EXPECTED_RECEIPT File Rule: N/A

EDI Transaction	I/O	Technology	PeopleSoft Application	PeopleBook Reference (Application Setup)	Application Messaging Information
Interunit Receipt (X.12 944)	I	Application message Flat file (FLO)	Inventory	See Part 4, “Integrating to Warehouse Management Systems,” page 137. See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Receiving and Putting Away Stock”.	File Layout Definition: INTERUNIT_RECEIPT Message Name: INTERUNIT_RECEIPT Channel Name: INTERUNIT_RECEIPT Subscription Name: InterunitReceipt Batch Publish Rule: N/A File Rule: <ul style="list-style-type: none"> • SCM_INBOUND_ED • Electronic Data Collection Feature Data Rules
Inventory Adjustment (X.12 947)	I	Application message Flat file (FLO)	Inventory	See Part 4, “Integrating to Warehouse Management Systems,” page 137. See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Making Stock Quantity Adjustments and Transfers Within the Business Unit”.	File Layout Definition: INVENTORY_ADJUSTMENT Message Name: INVENTORY_ADJUSTMENT Channel Name: INVENTORY_MANAGEMENT Subscription Name: InventoryAdjustment Batch Publish Rule: N/A File Rule: <ul style="list-style-type: none"> • SCM_INBOUND_ED • Electronic Data Collection Feature Data Rules

EDI Transaction	I/O	Technology	PeopleSoft Application	PeopleBook Reference (Application Setup)	Application Messaging Information
Inventory Balance Notification (X.12 846)	O	Application message Flat file (FLO)	Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Order Fulfillment Processing,” Understanding Enterprise Integration Points for Fulfillment Transactions. See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Managing Consigned Inventory”.	File Layout Definition: <ul style="list-style-type: none"> • INV_BAL_NOTIF_BUS_UNIT • INV_BAL_NOTIF_VENDOR Message Name: <ul style="list-style-type: none"> • INV_BAL_NOTIF_BUS_UNIT • INV_BAL_NOTIF_VENDOR Channel Name: INV_BALANCE_NOTIFICATION Subscription Name: N/A Batch Publish Rule: <ul style="list-style-type: none"> • INV_BAL_NOTIF_BUS_UNIT • INV_BAL_NOTIF_VENDOR File Rule: N/A
Item Price List (X.12 832)	I	Application message Flat file (FLO)	Inventory	See <i>PeopleSoft Managing Items 8.8 PeopleBook</i> , “Loading Items,” Understanding Item Price List and Item Master Enterprise Integration Points.	File Layout Definition: ITEM_PRICELIST_LOAD Message Name: ITEM_PRICELIST_LOAD Channel Name: ITEM_CATALOG_PRICE Subscription Name: ItemPriceListLoad Batch Publish Rule: N/A File Rule: SCM_INBOUND_EDI

EDI Transaction	I/O	Technology	PeopleSoft Application	PeopleBook Reference (Application Setup)	Application Messaging Information
Payments (X.12 820)	I	Application message Flat file (FLO)	Receivables	See <i>PeopleSoft Receivables 8.8 PeopleBook</i> , “Receiving Payments Electronically”.	File Layout Definition: PAYMENT_LOAD Message Name: PAYMENT_LOAD Channel Name: PAY_AND_REMIT Subscription Name: PaymentLoad Batch Publish Rule: N/A File Rule: N/A
Payments (X.12 820)	O	EDI Manager	Payables	See <i>PeopleSoft Payables 8.8 PeopleBook</i> , “Processing Batch Vouchers”.	N/A
Price Sales Catalog (X.12 832)	O	Application message Flat file (FLO)	Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages”.	File Layout Definition: PRODUCT_PRICELIST_SYNC Message Name: PRODUCT_PRICELIST_SYNC Channel Name: N/A Subscription Name: N/A Batch Publish Rule: PRODUCT_PRICELIST_CUSTOMER_ID File Rule: N/A
Purchase Order Acknowledgement and Purchase Order Change Acknowledgement (X.12 855, 865)	I	Application message Flat file (FLO)	Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.	File Layout Definition: PURCHASE_ORDER_ACKNOWLEDGEMENT Message Name: PURCHASE_ORDER_ACKNOWLEDGEMENT Channel Name: PURCHASE_ORDER Subscription Name: PurchaseOrderAcknowledgement Batch Publish Rule: N/A File Rule: SCM_INBOUND_EDI

EDI Transaction	I/O	Technology	PeopleSoft Application	PeopleBook Reference (Application Setup)	Application Messaging Information
Purchase Order and Purchase Order Change (X.12 850, 860)	O	Application message Flat file (FLO)	Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.	File Layout Definition: PURCHASE_ORDER_DISPATCH Message Name: PURCHASE_ORDER_DISPATCH Channel Name: PURCHASE_ORDER Subscription Name: N/A Batch Publish Rule: PURCHASE_ORDER_DISPATCH_BU File Rule: N/A
Request for Quote (X.12 840)	O	Application message Flat file (FLO)	Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.	File Layout Definition: PO_REQUEST_FOR_QUOTE Message Name: PO_REQUEST_FOR_QUOTE Channel Name: PO_REQUEST_FOR_QUOTE Subscription Name: N/A Batch Publish Rule: PO_REQUEST_FOR_QUOTE_BU File Rule: N/A
Request for Quote Response (X.12 843)	I	Application message Flat file (FLO)	Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.	File Layout Definition: PO_REQUEST_FOR_QUOTE_RESPONSE Message Name: PO_REQUEST_FOR_QUOTE_RESPONSE Channel Name: PO_REQUEST_FOR_QUOTE Subscription Name: PoRequestForQuoteResponse Batch Publish Rule: N/A File Rule: SCM_INBOUND_EDI

EDI Transaction	I/O	Technology	PeopleSoft Application	PeopleBook Reference (Application Setup)	Application Messaging Information
Return to Vendor	O	Application message Flat file (FLO)	Purchasing	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , “Using Messaging”.	File Layout Definition: RETURN_TO_VENDOR Message Name: RETURN_TO_VENDOR Channel Name: RETURN_TO_VENDOR Subscription Name: N/A Batch Publish Rule: <ul style="list-style-type: none"> RETURN_TO_VENDOR_BU RETURN_TO_VENDOR_VENDOR File Rule: N/A
Sales Order (X.12 850)	I	Application message Flat file (FLO)	Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages”.	File Layout Definition: SALES_ORDER_LOAD Message Name: SALES_ORDER_LOAD Channel Name: SALES_ORDER_LOAD Subscription Name: SalesOrderLoad Batch Publish Rule: N/A File Rule: SCM_INBOUND_EDI
Sales Order Acknowledgement (X.12 855)	O	Application message Flat file (FLO)	Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages”.	File Layout Definition: SALES_ORDER_ACKNOWLEDGEMENT Message Name: SALES_ORDER_ACKNOWLEDGEMENT Channel Name: SALES_ORDER_ACKNOWLEDGEMENT Subscription Name: N/A Batch Publish Rule: SALES_ORDER_ACK_CUSTOMER_ID File Rule: N/A

EDI Transaction	I/O	Technology	PeopleSoft Application	PeopleBook Reference (Application Setup)	Application Messaging Information
Sales Order Change (X.12 860)	I	Application message Flat file (FLO)	Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages”.	File Layout Definition: SALES_ORDER_CHANGE_LOAD Message Name: SALES_ORDER_CHANGE_LOAD Channel Name: SALES_ORDER_CHANGE_LOAD Subscription Name: SalesOrderChangeLoad Batch Publish Rule: N/A File Rule: SCM_INBOUND_EDI
Sales Order Change Acknowledgement (X.12 865)	O	Application message Flat file (FLO)	Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages”.	File Layout Definition: SALES_ORDER_CHANGE_NOTICE Message Name: SALES_ORDER_CHANGE_NOTICE Channel Name: SALES_ORDER_CHANGE_NOTICE Subscription Name: N/A Batch Publish Rule: SALES_ORDER_CHG_CUSTOMER_ID File Rule: N/A
Sales Quote (X.12 840)	I	Application message Flat file (FLO)	Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages”.	File Layout Definition: SALES_QUOTE_LOAD Message Name: SALES_QUOTE_LOAD Channel Name: SALES_QUOTE_LOAD Subscription Name: SalesQuoteLoad Batch Publish Rule: N/A File Rule: SCM_INBOUND_EDI

EDI Transaction	I/O	Technology	PeopleSoft Application	PeopleBook Reference (Application Setup)	Application Messaging Information
Sales Quote Acknowledgement (X.12 845)	O	Application message Flat file (FLO)	Order Management	See <i>PeopleSoft Order Management 8.8 PeopleBook</i> , “Using Sales Order and Quotation Messages”.	File Layout Definition: SALES_QUOTE_NOTICE Message Name: SALES_QUOTE_NOTICE Channel Name: SALES_QUOTE_NOTICE Subscription Name: N/A Batch Publish Rule: SALES_QUOTE_NOTICE_CUSTOMER_ID File Rule: N/A
Shipping Notification (X.12 945)	I	Application message Flat file (FLO)	Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Order Fulfillment Processing,” Understanding Enterprise Integration Points for Fulfillment Transactions. See Part 4, “Integrating to Warehouse Management Systems,” page 137 .	File Layout Definition: SHIPPING_NOTIFICATION Message Name: SHIPPING_NOTIFICATION Channel Name: SHIPPING_NOTIFICATION Subscription Name: ShippingNotification Batch Publish Rule: N/A File Rule: SCM_INBOUND_EDI

EDI Transaction	I/O	Technology	PeopleSoft Application	PeopleBook Reference (Application Setup)	Application Messaging Information
Shipping Order Release (X.12 940)	O	Application message Flat file (FLO)	Inventory	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Order Fulfillment Processing,” Understanding Enterprise Integration Points for Fulfillment Transactions. See Part 4, “Integrating to Warehouse Management Systems,” page 137.	File Layout Definition: SHIPPING_ORDER_RELEASE Message Name: SHIPPING_ORDER_RELEASE Channel Name: SHIPPING_ORDER_RELEASE Subscription Name: N/A Batch Publish Rule: SHIPPING_ORDER_RELEASE File Rule: N/A
Vouchers (X.12 810)	I	Application message Flat file (FLO)	Payables	See <i>PeopleSoft Payables 8.8 PeopleBook</i> , “Processing Batch Vouchers”.	File Layout Definition: VOUCHER_BUILD Message Name: VOUCHER_BUILD Channel Name: VOUCHER Subscription Name: VOUCHER Batch Publish Rule: N/A File Rule: None

File Layout Definition Information

In this section, we discuss setup steps, specific field deltas that occur when translating between PeopleSoft application messages and flat files, and how to obtain a hardcopy file layout definition.

For outbound transactions, configure the Batch Publish utility to generate a flat file. To generate a flat file using this utility a File Layout Definition (FLD) must be setup in the PeopleSoft Application Designer. Messages identified as outbound EDI messages have FLDs set up to work with their associated batch publish rules. The flat file is deposited into a subdirectory accessible by the translation software (most EDI transformation software will sweep subdirectories looking for available transaction files).

For inbound transactions, you can load data into PeopleSoft using the Inbound File Publish utility. This utility reads a flat file and then publishes an XML message for the inbound EDI subscription processes. To process a flat file using the Inbound File Publish utility a FLD must be setup in the PeopleSoft Application Designer. Messages identified as inbound EDI messages have FLD's already set up.

The files generated or received as flat files follow the same rules as messages, with the exceptions noted below. Similarities to EDI Manager business document files are also noted:

- A flat file message has the same field sequence as the XML message, but every field in the XML message has a tag.

Fields in the flat file do not have a tag, as each field instead has a fixed position in each row within the file.

- Row IDs.

The row ID identifies the hierarchical structure of the transaction. These typically follow a pattern, though the pattern may differ from EDI transaction to EDI transaction. The row ID is the first field for every record in the definition. The convention is as follows:

```
Level0  000
Level1  100
Level2  200
etc.
```

- Audit action.

The AUDIT_ACTN field is defined on each record in the FLD. The file utilities copy this field between the record and the appropriate PSCAMA on a level-by-level basis. This field is defined as the second field for every record in the FLD. A blank audit action represents a record that did not have any changes to it; this record is included to preserve parent/child relationships. Thus, a lower level record may contain the changed data.

- A "control record" that determines the format of the file's layout exists at the top of each flat file.

This control record is commonly referred to as the "998" record.

The 998 record tells the Inbound File Publish Utility which message is coming next in the flat file.

Following is the record specification:

```
AAAAAAAAAABBBBBBBBBBBBBBBBBBBBBBBBBBBBBBBB
```

- AAAAAAAAAA is the 10-character file layout ID. This is the 998 record.

- BBBB... is the file layout ID name of up to 30 characters.

- The EDI transaction's data record structure appears as follows:

```
XXXYYAABBBBB
```

- XXX is the three-character ECFILEROWID.

- Y is the one-character AUDIT_ACTN flag.

- AAABBBB.... are the fields.


```

allinone.txt - Notepad
File Edit Search Help

998      PO_REQUEST_FOR_QUOTE_RESPONSE
000 M04 2220222 0000000008 L2000-03-09 07:12:02.000 TEST USDPRASADRAJUPRASADRAJU
100 M04 2220222 1 0000000008 L10001 THIS IS JUST A TEST. I AM TESTING INBO
998      PURCHASE_ORDER_ACKNOWLEDGEMENT
000 M04 00000001231 30 0 M04 Y 2000/02/1
100 M04 00000001231 10001 1234567890123456789012345678901234567890123456789
200CM04 00000001231 1 86.00000 2000/03/0712:12:00.000 M04A 8.0000 400.00
100 M04 00000001232 10002
200CM04 00000001232 1 1943.00000 2000/02/15NULL M04A 499.0000 971500
000 M04A 00000001231 30 0 M04A Y 2000/02/1
100 M04A 00000001231 10001 1234567890123456789012345678901234567890123456789
200CM04A 00000001231 1 86.00000 2000/03/0712:12:00.000 M04A 8.0000 400.00
100 M04A 00000001232 10002
200CM04A 00000001232 1 1943.00000 2000/02/15NULL M04A 499.0000 971500
998      ADVANCED_SHIPPING_RECEIPT
000 03-12-2000 M04BUM04INUPSEXPRESS110000000000222 XXXX
100 1237329190 8238956 03-13-2000
200 CON-12 1237329190 8238956 1 1 1001
300 1237329190 8238956 1 1001 1
110 1237329190 8238956 1 1 PRASAD RAJU
  
```

File Definitions

This file example contains three distinct file definitions:

- The PO_REQUEST_FOR_QUOTE_RESPONSE control record has a single transaction.
- The PURCHASE_ORDER_ACKNOWLEDGEMENT record has two transactions.
- The ADVANCED_SHIPPING_RECEIPT has a single transaction.

Obtaining a File Layout Definition

To obtain the File Layout Definitions for the various EDI transactions it's best to view and print the file layouts directly from the PeopleSoft Application Designer.

Run Date : 06 May 2002 : 02:23 PM

Database : M09000VL

Page 1 of 20

PeopleSoft File Layout Definition

File Layout Definition Name : ADVANCED_SHIPPING_NOTICE

Definition Name	Format	Definition ID	ID Start Pos	ID Length	File Name	Description
ADVANCED SHIPPING G NOTICE	0		0	0		Outbound File Layout

Record Name	Max Length	Record ID	ID Start Pos	ID Length	Offset	Description	
IN ASN SHIP HDR	846	000	1	3	0		
Field Name	Seq No	Yes	Field Type	Decimal Pos	Date Format	Date Separator	Field Length
ECFILEROYMD	1	Yes	Character				3
AUDIT ACTN	2	Yes	Character				1
EIP CTL ID	3	Yes	Character				25
BUSINESS_UNIT	4	Yes	Character				5
SHIP ID	5	Yes	Character				10
BILL OF LADING	6	Yes	Character				30
SETID	7	Yes	Character				5
CUST ID	8	Yes	Character				15
SHIP TO CUST ID	9	Yes	Character				15
ADDRESS SEQ NUM	10	Yes	Number	0			3
CARRIER_ID	11	Yes	Character				10
SHIP TYPE ID	12	Yes	Character				10
CUST NAME	13	Yes	Character				40

An example of a portion of the File Layout Definition report for the Advanced Shipping Notice EDI transaction generated in the PeopleSoft Application Designer (1 of 2)

Run Date : 06 May 2002 : 02:26 PM		Database : M06000\A		Page 2 of 20	
		PeopleSoft File Layout Definition			
		File Layout Definition Name : ADVANCED_SHIPPING_NOTICE			
Start Pos	Offset	Inherit Record	Inherit Field	Default Value	Description
1	0			000	
4	0				
5	0				
30	0				
35	0				
45	0				
75	0				
80	0				
95	0				
110	0				
113	0				
123	0				
133	0				
173	0				

An example of a portion of the File Layout Definition report for the Advanced Shipping Notice EDI transaction generated in the PeopleSoft Application Designer (1 of 2)

The File Layout Definition report contains all the necessary information to assist you with your flat file EDI transaction processing. The report contains information such as, each field in the file layout, the sequence of the fields, the type of field—character, number, and so on—length of the fields, and the starting position of the fields.

To open, view, and print the file layout for an EDI transaction:

1. Open an instance of the Application Designer.
2. Select File, Open.

The Open Definition dialog box appears.

3. In the Definition drop down menu, Select File Layout, enter the EDI transaction name in the Name field, and click Open.

The file layout definition you specified opens.

4. With the file layout definition open, select File, Print Preview.

The File Layout Definition Report appears for the file layout specified. You can easily scroll through the report to view the complete file layout definition online. A portion of the report is displayed above.

5. In print preview mode, click the Print button.

The File Layout Definition Report is routed and printed at the printer you select.

CHAPTER 5

Understanding the Differences Between the 7.5 Flat File EDI Processes and the 8.X Flat File EDI Processes

This chapter provides the following:

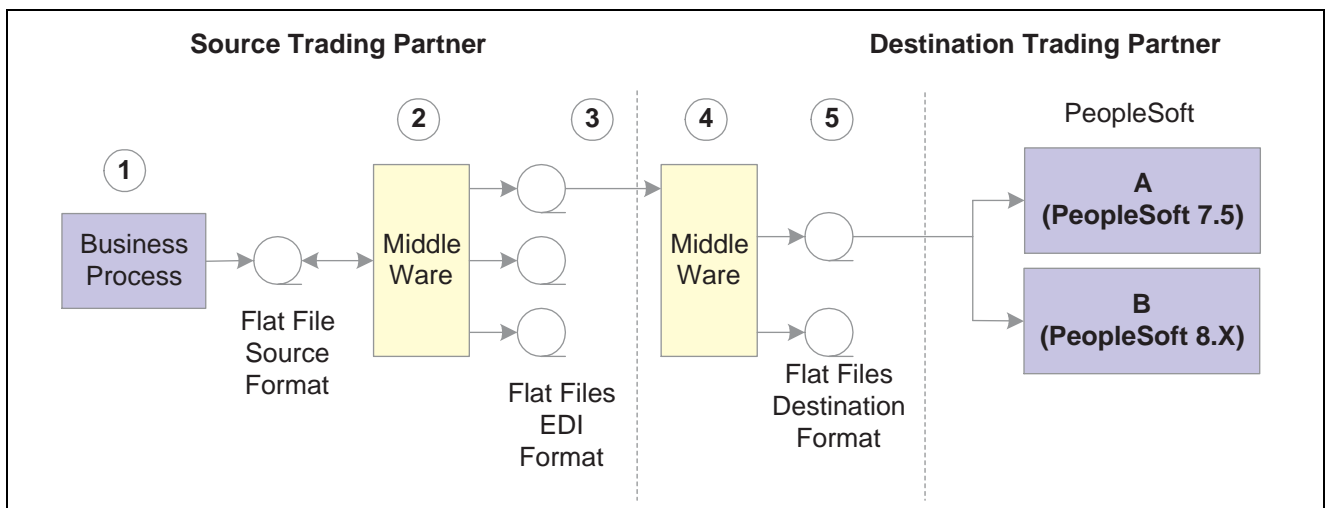
- Overview of the inbound process utilizing flat files (PeopleSoft 7.5 and 8.X).
- Overview of the outbound process utilizing flat files (PeopleSoft 7.5 and 8.X).
- EDI transaction set up using flat files.
- File layout definition information.

See Also

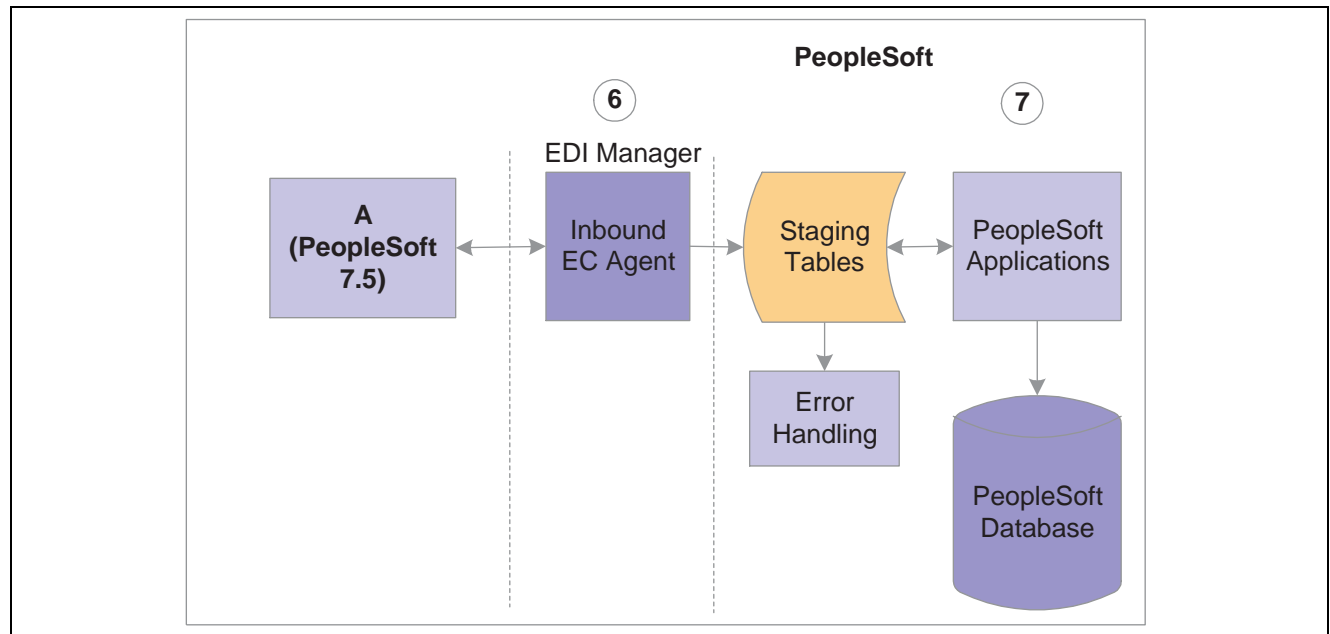
Chapter 4, “Using Electronic Data Interchange Messaging,” page 103

Understanding the Inbound Process Utilizing Flat Files (PeopleSoft 7.5 and 8.X)

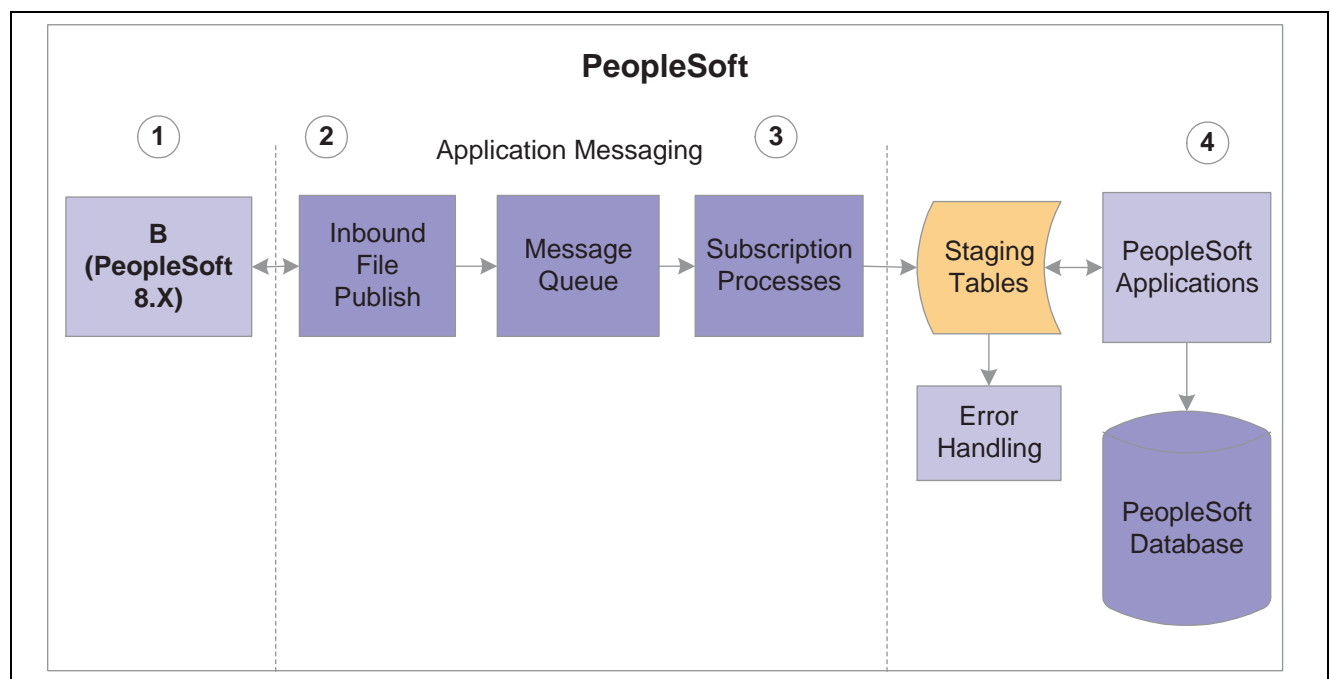
These diagrams depict the inbound transaction process:



Inbound Flat File EDI Transaction Process (PeopleSoft 7.5 and PeopleSoft 8.X)



PeopleSoft 7.5 Inbound Flat File EDI Transaction Process



PeopleSoft 8.X Inbound Flat File EDI Transaction Process

EDI transactions can be processed in a multitude of ways from a source trading partner to a destination trading partner. In an attempt to make the PeopleSoft process clear, described below is a very basic EDI transaction process flow for PeopleSoft 7.5 and PeopleSoft 8.X. Keep in mind that there can be many variations on this theme. These process flows are also depicted in the diagrams above.

There are only a few differences between how EDI transactions were processed in 7.5 and how they are now processed in 8.X. For PeopleSoft 7.5, EDI transactions were processed in PeopleSoft utilizing the EDI Manager. For PeopleSoft 8.X, now EDI transactions are processed in PeopleSoft utilizing Application Messaging. Messaging offers a more automated, timely, and efficient way to send data across systems than was previously available. The publish-and-subscribe architecture of PeopleSoft's application messaging technologies enables more zero-latency data transmittal, direct business-to-business communication, and Extensible Markup Language (XML) adoption. In PeopleSoft 8.X, we still maintain the ability to process EDI transactions using flat files. This allows for an easy transition to the new publish/subscribe technology that provides full capabilities to be implemented as business requirements and trading partner relationships demand this functionality.

Described in this overview is the simplest approach you would take moving from PeopleSoft 7.5 to 8.X. Basically an EDI Manager process has been replaced with an Application Messaging process. The changes are depicted in the diagrams above with the "gray" shading.

Inbound Flat File EDI Transaction Process PeopleSoft 7.5

To process inbound EDI flat file transactions:

1. Source trading partner initiates a process that generates a flat file containing EDI transactions in the source's format.
2. The file is passed on to a middleware translation tool that generates an outbound file in the appropriate EDI format (X.12, EDIFACT, and so forth). Depending on the relationship with various trading partners data mapping transformations may occur at this point to meet trading partner specific mapping requirements. The formatted file is then sent on to the source trading partner's VAN.

A VAN is a private network used for exchanging EDI transactions. However, networks can also be the Internet, a dedicated link, or a sole-source provider.

3. Source trading partner's VAN then distributes the flat file to the destination trading partner's VAN.

The source trading partner and destination trading partner could be using the same VAN.

4. Destination trading partner receives the flat file from the VAN. A middleware tool is used to convert the source file into the appropriate PeopleSoft Business Document file format. This process includes a conversion from the source's EDI format (X.12, EDIFACT, and so forth). Additional translation requirements may be necessary at this point if the source trading partner is sending a generic file that does not meet the destination trading partner's data requirements.
5. Destination trading partner performs the Inbound EC Agent process (EDI Manager) in PeopleSoft and this process loads the transactions into staging tables.

The Inbound EC Agent process inputs the electronic data flat file, translates the data using the PeopleSoft Business Document layout, and stages the data into the staging tables.

6. Different PeopleSoft applications initiate processes that read the transactions from the staging tables, perform validations, and load the data to the actual PeopleSoft application database tables.
7. If any errors are found in the transactions error handling is available to fix the errors and to resubmit the transactions.

Note. The mapping functions—to and from the standard EDI formats—may be done at the source trading partner's site, the source or destination's VAN, or at the destination trading partner's site depending on the relationship established with the trading partners and the VANs.

Inbound Flat File EDI Transaction Process PeopleSoft 8.X

To process inbound EDI flat file transactions:

1. Perform steps (steps 1 through 4) as discussed above for inbound flat file EDI transaction processing for PeopleSoft 7.5.

There are a few minor differences. Some of the business document file layouts have changed to take advantage of the new application level functionality as well as to work with the new processes that load the files.

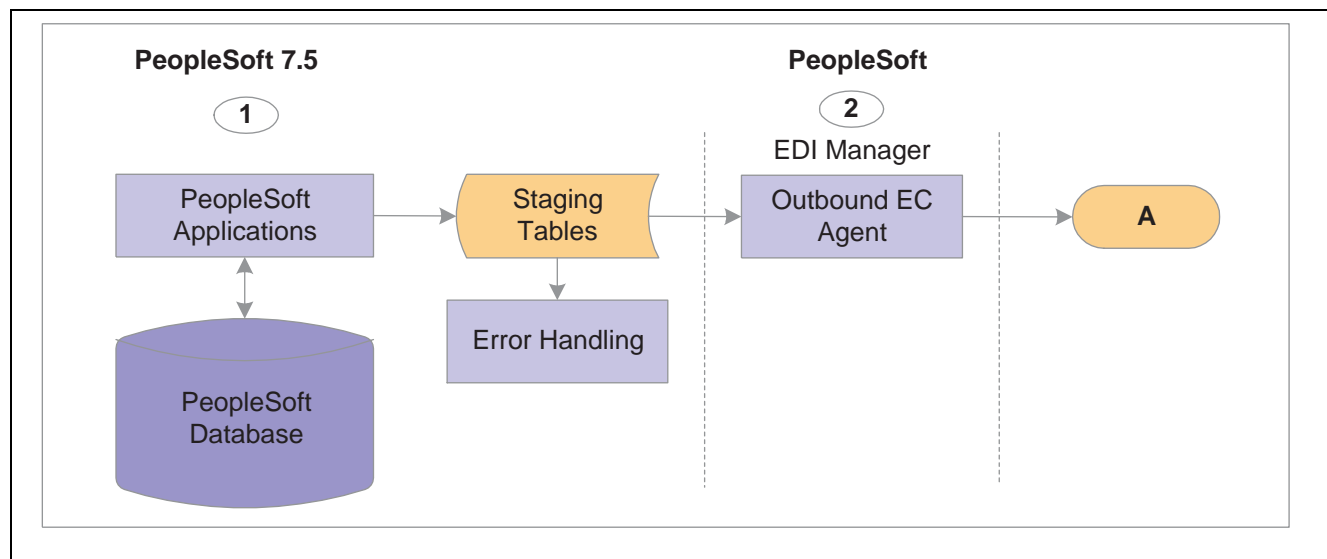
2. Destination trading partner performs the Inbound File Publish process that changes the flat file transactions to application messages and then writes them to a message queue.

The Inbound File Publish process inputs the electronic data flat file, translates the data using the PeopleSoft File Layout Definition and rules, and then publishes an application message.

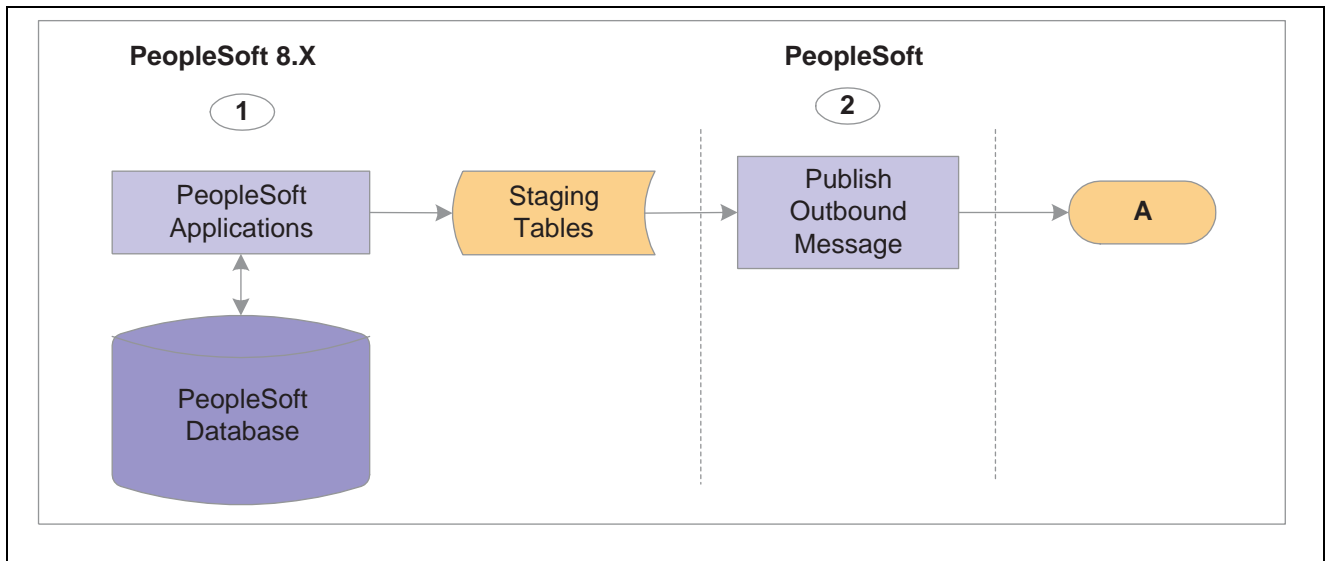
3. Different PeopleSoft Application Messaging subscription processes are automatically executed that retrieve the application messages from the message queue and then load the information into staging tables.
4. Different PeopleSoft applications initiate processes that read the transactions from the staging tables, perform validations, and load the data to the actual PeopleSoft application database tables.
5. If any errors are found in the transactions error handling is available to fix the errors and to resubmit the transactions.

Understanding the Outbound Process Utilizing Flat Files (PeopleSoft 7.5 and 8.X)

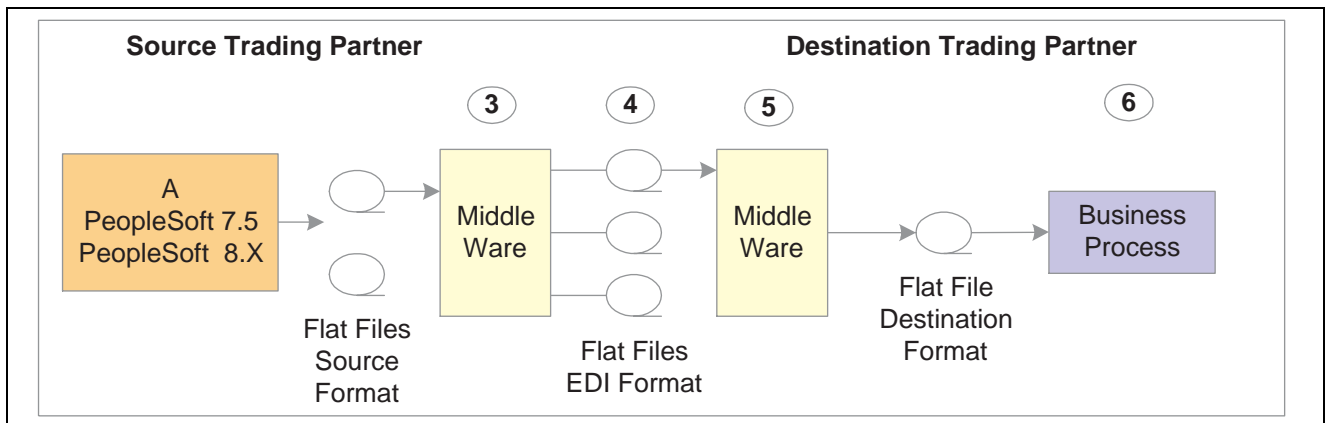
These diagrams depict the outbound transaction process:



Outbound Flat File EDI Transaction Process PeopleSoft 7.5



Outbound Flat File EDI Transaction Processing PeopleSoft 8.X



Outbound Flat File EDI Transaction Process (PeopleSoft 7.5 and PeopleSoft 8.X)

Outbound Flat File EDI Transaction Processing PeopleSoft 7.5

To process outbound flat file EDI transactions:

1. Source trading partner initiates a PeopleSoft application process that will retrieve the transactional data from the PeopleSoft application database tables and then load those EDI transactions into PeopleSoft staging tables or prepares the data so it can be picked up by the EDI Manager process.
2. Source trading partner performs the Outbound EC Agent process (EDI Manager) in PeopleSoft and this process reads the EDI transactions from the staging tables and generates a flat file.
3. The Outbound EC Agent process reads the staging tables, translates the data using the PeopleSoft Business Document layout, and generates a flat file. The file is passed on to a middleware translation tool that generates an outbound file in the appropriate EDI format (X.12, EDIFACT, and so forth). Depending on the relationship with various trading partner's, data mapping transformations may occur at this point to meet trading partner specific mapping requirements. The formatted file is then sent on to the source trading partners VAN.
4. Source trading partner's VAN then distributes the flat file to the destination trading partner's VAN.

5. Destination trading partner receives the flat file from the VAN. A middleware tool is used to convert the source file into the format required for the destination trading partner's business application software.
6. Destination trading partner loads the flat file into their business application system.

Outbound Flat File EDI Transaction Processing PeopleSoft 8.X

To process outbound flat file EDI transactions:

1. Source trading partner initiates a PeopleSoft application process that will retrieve the transactional data from the PeopleSoft application database tables and then load those EDI transactions into PeopleSoft staging tables or prepares the data so it can be picked up by the Publish Outbound Message process.
2. Source trading partner performs the Publish Outbound Message process that retrieves the transactions from the staging tables or application tables and creates a flat file. The flat file is then sent to the VAN.

The Outbound File Publish process reads the staging tables, translates the data using the PeopleSoft File Layout Definition and rules, and generates a flat file.

3. Perform steps (steps 3 through 6) as discussed above for outbound flat file EDI transaction processing for PeopleSoft 7.5.

EDI Transaction Set Up Using Flat Files

Before EDI transactions can be successfully processed several setup steps are required. These setup steps fall into two specific areas:

- PeopleSoft application specific setup. Depending on the EDI transactions you are processing you may need to access the particular PeopleSoft applications such as, PeopleSoft Inventory or PeopleSoft Purchasing and perform the individual application setup required for the EDI transactions.
- PeopleSoft Application Messaging setup. PeopleSoft provides many widely used industry standard EDI transactions. These application messages and some of the other objects used to support messaging are delivered inactive so that they do not have to be touched if not used. They will need to be activated if a message is to be utilized.

Inbound Publishing

To set up an EDI transaction using flat files for inbound publishing:

1. If trading partner is not delivering data in PeopleSoft's business document file format, then set up mapping software to transform the trading partners format to PeopleSoft's format.

For a definition of PeopleSoft's business document file format obtain the file layout for the EDI transaction. The procedure for obtaining the file layouts is discussed in the File Layout Definition Information section of this chapter. For the appropriate file layout definition for each transaction see the section List of EDI Transactions Supported by PeopleSoft.

See Chapter 4, "Using Electronic Data Interchange Messaging," List of EDI Transactions Supported by PeopleSoft, page 111.

2. Perform application specific setup.

The table in the section List of EDI Transactions Supported by PeopleSoft identifies where to find the documentation explaining application specific setup instructions for each EDI transaction.

See Chapter 4, “Using Electronic Data Interchange Messaging,” List of EDI Transactions Supported by PeopleSoft, page 111.

3. Perform Application Messaging setup.

Nodes, channels, messages, and subscription processes must be set up before you can begin processing inbound transactions.

a. Set up nodes.

For inbound transactions using flat files you only need the local node. The Local node (PSFT_EP) is packaged with initial delivery of the system so unless you are changing the local node no additional node setup is required.

b. Activate messages.

PeopleSoft provides message definitions for each EDI transaction. You must activate the message in order to use it.

See Chapter 4, “Using Electronic Data Interchange Messaging,” List of EDI Transactions Supported by PeopleSoft, page 111.

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

c. Activate the subscription processes.

Subscription processes are processes that are automatically executed by Application Messaging when an inbound message is received. PeopleSoft provides subscription processes for each message. You must activate the appropriate subscription process for each message.

See Chapter 4, “Using Electronic Data Interchange Messaging,” List of EDI Transactions Supported by PeopleSoft, page 111.

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

4. Set up Inbound File Rule.

The Inbound File Publish process uses the inbound file rule to identify information about the source file. Most EDI transactions are already set up on the “SCM Inbound EDI” file rule. If you are processing one of these transactions then all you have to do is enter the file name on the file rule and activate the file rule.

See *PeopleSoft Enterprise Components*, “Using the Flat File Utility”.

5. Setup Publish/Subscribe services on the Application Server.

Note. A web server does not have to be set up when working only with inbound flat files since the Inbound File Publish process is publishing application messages to the local node.

See *PeopleTools PeopleBook: Application Messaging PeopleBook*

6. When you are ready to process a trading partners file run the Inbound File Publish process. Then, run the appropriate application process to validate and load the transactions.

See *PeopleSoft Enterprise Components*, “Using the Flat File Utility”.

See [Chapter 4, “Using Electronic Data Interchange Messaging,” List of EDI Transactions Supported by PeopleSoft, page 111.](#)

Outbound Publishing

To set up an EDI transaction using flat files for outbound publishing:

1. If trading partner is not delivering data in PeopleSoft’s business document file format, then set up mapping software to transform the trading partners format to PeopleSoft’s format.

For a definition of PeopleSoft’s business document file format obtain the file layout for the EDI transaction. The procedure for obtaining the file layouts is discussed in the File Layout Definition Information section of this chapter. For the appropriate file layout definition for each transaction see the section List of EDI Transactions Supported by PeopleSoft.

See [Chapter 4, “Using Electronic Data Interchange Messaging,” List of EDI Transactions Supported by PeopleSoft, page 111.](#)

2. Perform application specific setup.

The table in the section List of EDI Transactions Supported by PeopleSoft identifies where to find the documentation explaining application specific setup instructions for each EDI transaction.

See [Chapter 4, “Using Electronic Data Interchange Messaging,” List of EDI Transactions Supported by PeopleSoft, page 111.](#)

3. Activate messages.

PeopleSoft provides message definitions for each EDI transaction. You must activate the message in order to use it.

See [Chapter 4, “Using Electronic Data Interchange Messaging,” List of EDI Transactions Supported by PeopleSoft, page 111.](#)

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

4. Set up Batch Publish Rules.

The Publish Outbound Message process uses the batch publish rules to identify information about the transaction being published. Batch publish rules have been prepackaged to work with each outbound message that are initiated using the Publish Outbound Message process. These rules must be activated before they can be used. When sending transactions to a flat file you must also set the output format to flat file on the batch publish rule.

The table in the section List of EDI Transactions Supported by PeopleSoft identifies names of batch publish rules associated with outbound EDI messages.

See [Chapter 4, “Using Electronic Data Interchange Messaging,” List of EDI Transactions Supported by PeopleSoft, page 111.](#)

See *PeopleSoft Enterprise Components*, “Using the Effective Date Publish Utility,”
Performing a Full Data Publish of Current Effective Data.

Note. When using an output format of flat file on the batch publish rule an application message is never generated. The output goes directly to a flat file. This is why the channel and node do not need to be set up for outbound transactions published from the Publish Outbound Message process that are going to flat files. The message still needs to be activated in the Application Designer since validations are performed to prevent unexpected transactions from being generated.

Note. Neither a web server nor Publish/Subscribe services with an application server need to be set up when working only with transactions published from the Publish Outbound Message process where the batch publish rule is set up with an output format of flat file. These transactions are written directly to flat files and application messages are never generated.

5. When you are ready to generate EDI transactions run the appropriate application processes.

The table in the section List of EDI Transactions Supported by PeopleSoft identifies where to find the documentation explaining the application specific information for each EDI transaction.

See [Chapter 4, “Using Electronic Data Interchange Messaging,” List of EDI Transactions Supported by PeopleSoft, page 111.](#)

File Layout Definition Information

In this section, we discuss setup steps, specific field deltas that occur when translating between PeopleSoft application messages and flat files, and how to obtain a hardcopy file layout definition.

For outbound transactions, configure the Batch Publish utility to generate a flat file. To generate a flat file using this utility a File Layout Definition (FLD) must be setup in the PeopleSoft Application Designer. Messages identified as outbound EDI messages have FLDs set up to work with their associated batch publish rules. The flat file is deposited into a subdirectory accessible by the translation software (most EDI transformation software will sweep subdirectories looking for available transaction files). The format of these files closely matches previous PeopleSoft EDI Manager files, minimizing the changes in the process of mapping to the format.

For inbound transactions, you can load data into PeopleSoft using the Inbound File Publish utility. This utility reads a flat file that mimics PeopleSoft EDI Manager format, then publishes an XML message for the inbound EDI subscription processes. To process a flat file using the Inbound File Publish utility a FLD must be setup in the PeopleSoft Application Designer. Messages identified as inbound EDI messages have FLD's already set up.

The files generated or received as flat files follow the same rules as messages, with the exceptions noted below. Similarities to EDI Manager business document files are also noted:

- A flat file message has the same field sequence as the XML message, but every field in the XML message has a tag.

Fields in the flat file do not have a tag, as each field instead has a fixed position in each row within the file.

- Row IDs.

ECFILEROWIDs from EDI Manager maps still exist. These typically follow a pattern, though the pattern may differ from EDI transaction to EDI transaction. The ECFILEROWID is the first field for every record in the definition. The convention is as follows:

```

Level0  000
Level11 100
Level12 200
etc.

```

- Audit action.

The AUDIT_ACTN field is defined on each record in the FLD. The file utilities copy this field between the record and the appropriate PSCAMA on a level-by-level basis. This field is defined as the second field for every record in the FLD. A blank audit action represents a record that did not have any changes to it; this record is included to preserve parent/child relationships. Thus, a lower level record may contain the changed data.

- A "control record" that determines the format of the file's layout exists at the top of each PeopleSoft EDI Manager flat file.

This control record is commonly referred to as the "999" or "998" record.

The 999 record specifies the trading partner identifiers related to the document's sender and receiver. These IDs resolve to a specific map format using a database query in PeopleSoft EDI Manager.

The 998 record specifies the actual map name and transaction ID.

The new FLDs also supports control records. PeopleSoft Application Designer specifies the format of the record, which then instructs the file object processor how to interpret the record data. The convention used for PeopleTools 8.4 EDI transactions becomes the 998 record.

Following is the record specification:

```
AAAAAAAAAABBBBBBBBBBBBBBBBBBBBBBBBBBBBBBBBBB
```

- AAAAAAAAAA is the 10-character file layout ID. This is the 998 record.
- BBBB... is the file layout ID name of up to 30 characters.

- The EDI transaction's data record structure appears as follows:

```
XXXYAAABBBB
```

- XXX is the three-character ECFILEROWID.
- Y is the one-character AUDIT_ACTN flag.
- AAABBBB.... are the fields.

```

allinone.txt - Notepad
File Edit Search Help

998 PO_REQUEST_FOR_QUOTE_RESPONSE
000 M04 2220222 0000000008 L2000-03-09 07:12:02.000 TEST USDPRASADRAJUPRASADRAJU
100 M04 2220222 1 0000000008 L10001 THIS IS JUST A TEST. I AM TESTING INBO
998 PURCHASE_ORDER_ACKNOWLEDGEMENT
000 M04 00000001231 30 0 M04 Y 2000/02/1
100 M04 00000001231 10001 1234567890123456789012345678901234567890123456789
200CM04 00000001231 1 86.00000 2000/03/0712:12:00.000 M04A 8.0000 400.00
100 M04 00000001232 10002
200CM04 00000001232 1 1943.00000 2000/02/15NULL M04A 499.0000 971500
000 M04A 00000001231 30 0 M04A Y 2000/02/1
100 M04A 00000001231 10001 1234567890123456789012345678901234567890123456789
200CM04A 00000001231 1 86.00000 2000/03/0712:12:00.000 M04A 8.0000 400.00
100 M04A 00000001232 10002
200CM04A 00000001232 1 1943.00000 2000/02/15NULL M04A 499.0000 971500
998 ADVANCED_SHIPPING_RECEIPT
000 03-12-2000 M04BUM04INUPSEXPRESS110000000000222 XXXX
100 1237329190 8238956 03-13-2000
200 CON-12 1237329190 8238956 1 1 1001
300 1237329190 8238956 1 1001 1
110 1237329190 8238956 1 1 PRASAD RAJU
  
```

File Definitions

This file example contains three distinct file definitions:

- The PO_REQUEST_FOR_QUOTE_RESPONSE control record has a single transaction.
- The PURCHASE_ORDER_ACKNOWLEDGEMENT record has two transactions.
- The ADVANCED_SHIPPING_RECEIPT has a single transaction.

Obtaining a File Layout Definition

To obtain the File Layout Definitions for the various EDI transactions it's best to view and print the file layouts directly from the PeopleSoft Application Designer.

Run Date : 06 May 2002 : 02:23 PM Database : M09000VL Page 1 of 20
 PeopleSoft File Layout Definition
 File Layout Definition Name : ADVANCED_SHIPPING_NOTICE

Definition Name	Format	Definition ID	ID Start Pos	ID Length	File Name	Description
ADVANCED_SHIPPING_NOTICE	0		0	0		Outbound File Layout

Record Name	Max Length	Record ID	ID Start Pos	ID Length	Offset	Description	Field Length
IN ASN SHIP HDR	846	000	1	3	0		
Field Name	Seq No	Yes	Field Type	Decimal Pos	Date Format	Date Separator	
ECFILEROYMD	1	Yes	Character				3
AUDIT ACTN	2	Yes	Character				1
EIP_CTL_ID	3	Yes	Character				25
BUSINESS_UNIT	4	Yes	Character				5
SHIP_ID	5	Yes	Character				10
BILL OF LADING	6	Yes	Character				30
SETID	7	Yes	Character				5
CUST_ID	8	Yes	Character				15
SHIP TO CUST ID	9	Yes	Character				15
ADDRESS SEQ NUM	10	Yes	Number	0			3
CARRIER_ID	11	Yes	Character				10
SHIP TYPE ID	12	Yes	Character				10
CUST NAME	13	Yes	Character				40

An example of a portion of the File Layout Definition report for the Advanced Shipping Notice EDI transaction generated in the PeopleSoft Application Designer (1 of 2)

Run Date : 06 May 2002 : 02:26 PM		Database : M06000\A		Page 2 of 20	
		PeopleSoft File Layout Definition			
		File Layout Definition Name : ADVANCED_SHIPPING_NOTICE			
Start Pos	Offset	Inherit Record	Inherit Field	Default Value	Description
1	0			000	
4	0				
5	0				
30	0				
35	0				
45	0				
75	0				
80	0				
95	0				
110	0				
113	0				
123	0				
133	0				
173	0				

An example of a portion of the File Layout Definition report for the Advanced Shipping Notice EDI transaction generated in the PeopleSoft Application Designer (1 of 2)

The File Layout Definition report contains all the necessary information to assist you with your flat file EDI transaction processing. The report contains information such as, each field in the file layout, the sequence of the fields, the type of field—character, number, and so on—length of the fields, and the starting position of the fields.

To open, view, and print the file layout for an EDI transaction:

1. Open an instance of the Application Designer.
2. Select File, Open.

The Open Definition dialog box appears.

3. In the Definition drop down menu, Select File Layout, enter the EDI transaction name in the Name field, and click Open.

The file layout definition you specified opens.

4. With the file layout definition open, select File, Print Preview.

The File Layout Definition Report appears for the file layout specified. You can easily scroll through the report to view the complete file layout definition online. A portion of the report is displayed above.

5. In print preview mode, click the Print button.

The File Layout Definition Report is routed and printed at the printer you select.

PART 4

Integrating to Warehouse Management Systems

Chapter 6

Understanding Warehouse Management Systems

CHAPTER 6

Understanding Warehouse Management Systems

This chapter discusses:

- General warehouse management system (WMS) integration issues.
- WMS enterprise integration points (EIPs).
- The order-to-cash business process in a WMS integration.
- The procure-to-pay business process in a WMS integration.
- Four-wall warehousing functions in a WMS integration.
- Static information updates in a WMS integration.

General WMS Integration Issues

This section discusses system-wide assumptions about WMS integration.

Integrating PeopleSoft with a third-party WMS enables you to streamline the order-to-cash and procure-to-pay business processes. This streamlining enables you to reduce costs, improve service levels, and generate more revenue.

You can integrate the following products with a WMS:

- PeopleSoft Purchasing.
- PeopleSoft Payables.
- PeopleSoft Order Management.
- PeopleSoft Inventory.

The integration consists of generic EIPs using PeopleSoft Application Messaging publish and subscribe technology to exchange transactional and static data between the PeopleSoft system and the WMS. Transactional data relates to order processing and material management. Static data relates to customers, items, carriers, and locations.

See Also

PeopleSoft Enterprise Components

System-Wide Assumptions About WMS Integration

The WMS integration works as designed only if you understand certain system-wide assumptions and your system complies with them. The following sections discuss these assumptions.

Business Units

One WMS installation corresponds to one PeopleSoft Inventory business unit. When defining the PeopleSoft Inventory business unit in the PeopleSoft system, you specify that the business unit is under external warehouse control on the Inventory Definition - Business Unit Options page.

Static Information

All static information, such as customer, vendor, carrier, and item information, is maintained in the PeopleSoft system. Updates are sent to the WMS when new information is added or changes are made to existing information. Changes made to this information within the WMS are not sent back to the PeopleSoft system.

Quantity Balance Data

The WMS drives all inventory balances. The WMS sends material movement transactions to the PeopleSoft system. Any material movement transactions initiated in the system are *not* sent to the WMS. If the WMS is not manually updated to reflect a material movement transaction performed in the PeopleSoft system, quantity balance data between the two systems will not agree.

Open and Hold Stock Status Attributes

The PeopleSoft system does not need to track on-hand quantity balances at the storage location level because all material movement transactions occur within the WMS. In most cases, quantity balances in the PeopleSoft system can be maintained at the business-unit level by using the *Open* or *Hold* stock status attributes to determine which stock is available to fulfill orders. In this balance structure, you can use the PeopleSoft storage location balance record, PHYSICAL_INV, to maintain the *Open* and *Hold* quantity balances. Two storage location balance records are created in PHYSICAL_INV: one for stock quantity with an *Open* status and another for stock quantity with a *Hold* status.

When determining whether to use this structure or a more detailed balance structure, take the following considerations into account:

- Storage locations can have a status of only *Open* or *Hold*.

Inventory status values of *Restricted* and *Rejected* are not used in a WMS integration. You should always initiate status updates in the WMS. Status changes made using the Inventory Status page or the Lot Control Information page in PeopleSoft Inventory are not reflected in the WMS and may cause discrepancies between the available (that is, *Open*) and unavailable (or *Hold*) quantity balances in the two systems.

- The status update message that the WMS sends to the PeopleSoft system does not directly change the status of stock.

Instead, the WMS reports a storage location stock transfer in which the stock is moved to a location with the appropriate status, *Open* or *Hold*. The Inventory Transfer EIP (the EIP used for status update messages) is designed with the assumption that the *Open* or *Hold* status of a storage location is handled in the WMS mapping logic to support the status update transaction. If the WMS implementation uses the storage location fields in PeopleSoft Inventory for purposes other than tracking *Open* and *Hold* balances, these fields must be accounted for in the mapping logic.

- All key fields related to item definition in the PeopleSoft Inventory storage location balance table, PHYSICAL_INV, are supported for transactions that allow entry of the item ID.

These fields include the business unit, item, staged date, lot ID, serial ID, container ID, and unit of measure. If you want to maintain a breakdown of balances at a lower level than the item ID (for example, at the lot ID or serial ID level), all transactions entered against these balances must contain all item definition keys.

- Modifications to the check boxes on the Material Storage Locations page in PeopleSoft Inventory can affect available balances for items in that location.

Changes made to these settings are not reflected in the WMS and may cause discrepancies in the available and unavailable quantity balances between the two systems.

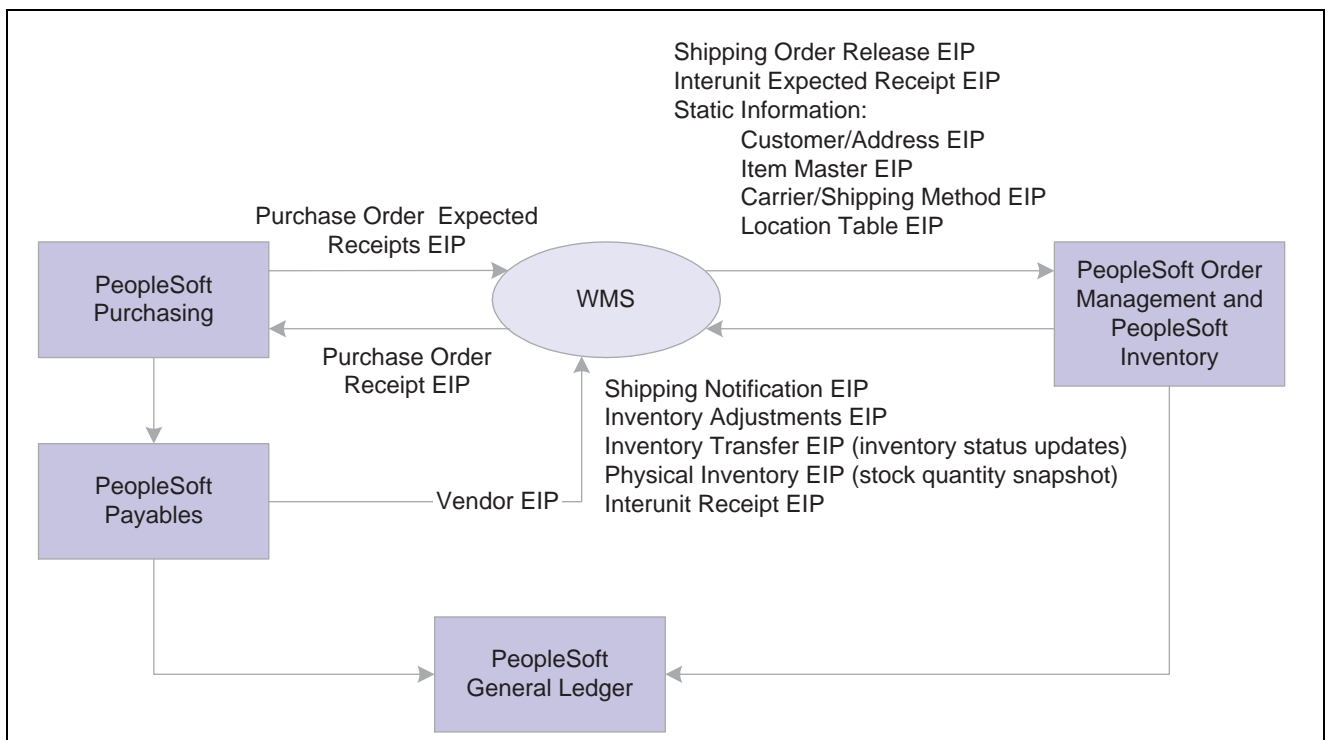
See Also

PeopleSoft Inventory 8.8 PeopleBook, “Managing Inventory Status”

WMS EIPs

EIPs are used to exchange data between the PeopleSoft system and a WMS.

The following diagram illustrates the data flow in a WMS integration:



PeopleSoft and warehouse management system integration

The following sections describe the information that each EIP provides.

PeopleSoft Purchasing

The EIPs within PeopleSoft Purchasing are:

EIP Name	Description
Purchase Order Expected Receipts EIP (outbound)	Provides the WMS with a list of expected receipts that have not been received for a dispatched purchase order.
Purchase Order Receipt EIP (inbound)	Updates the status of purchase order receipts in the PeopleSoft system to indicate whether the quantity on the receipt has been received in the WMS system.

PeopleSoft Order Management and PeopleSoft Inventory

The EIPs within PeopleSoft Order Management and PeopleSoft Inventory are:

EIP Name	Description
Shipping Order Release EIP (outbound)	Provides the WMS with details of orders that have been released for picking and shipment.
Interunit Expected Receipt EIP (outbound)	Notifies the WMS that an interunit stock transfer has been shipped to it from another PeopleSoft Inventory business unit.
Customer/Address EIP (outbound)	Updates the customer and address information in the WMS with the current information in the PeopleSoft system.
Item Master EIP (outbound)	Updates item master, item business unit attributes, purchasing item attributes, item unit of measure, and item revision information in the WMS with the current information in the PeopleSoft system.
Carrier/Shipping Method EIP (outbound)	Updates carrier and shipping method information in the WMS with the current information in the PeopleSoft system.
Location Table EIP (outbound)	Updates internal ship to location data in the WMS with the current information in the PeopleSoft system.
Shipping Notification EIP (inbound)	Reports picking and shipping activities to the PeopleSoft system.
Inventory Adjustment EIP (inbound)	Reports adjustments in stock quantity balances to PeopleSoft.

EIP Name	Description
Inventory Transfer EIP (inbound)	Reports transfers of stock quantity between storage locations. In a WMS integration, this message is used by the WMS to modify the inventory status in PeopleSoft Inventory to <i>Open</i> or <i>Hold</i> . The stock quantity is logically transferred to a location with the appropriate status.
Physical Inventory EIP (inbound)	Reports cycle counting and complete physical inventory activities. In a WMS integration, this message is used to synchronize the quantity balances between the two systems. PeopleSoft Inventory processes this message as a stock quantity update from a counting event.
Interunit Receipt EIP (inbound)	Updates the status of interunit receipts in PeopleSoft to indicate whether the quantity on the receipt has been received in the WMS system.

PeopleSoft Payables

The EIPs within PeopleSoft Payables are:

EIP Name	Description
Vendor EIP (outbound)	Updates the WMS with the current data from the vendor table and its related tables in the PeopleSoft system.

PeopleSoft General Ledger

PeopleSoft General Ledger is not directly integrated with the WMS. Instead, it is updated by transactions in PeopleSoft Payables, PeopleSoft Order Management, and PeopleSoft Inventory.

See Also

PeopleSoft Enterprise Components

Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” page 9

Chapter 6, “Understanding Warehouse Management Systems,” The Order-to-Cash Business Process in a WMS Integration, page 144

Chapter 6, “Understanding Warehouse Management Systems,” The Procure-to-Pay Business Process in a WMS Integration, page 149

Chapter 6, “Understanding Warehouse Management Systems,” Four-Wall Warehousing Functions in a WMS Integration, page 154

Chapter 6, “Understanding Warehouse Management Systems,” Static Information Updates in a WMS Integration, page 156

PeopleSoft Inventory 8.8 PeopleBook, “Managing Inventory Status”

PeopleSoft Inventory 8.8 PeopleBook, “Performing Physical Accounting”

The Order-to-Cash Business Process in a WMS Integration

This section discusses:

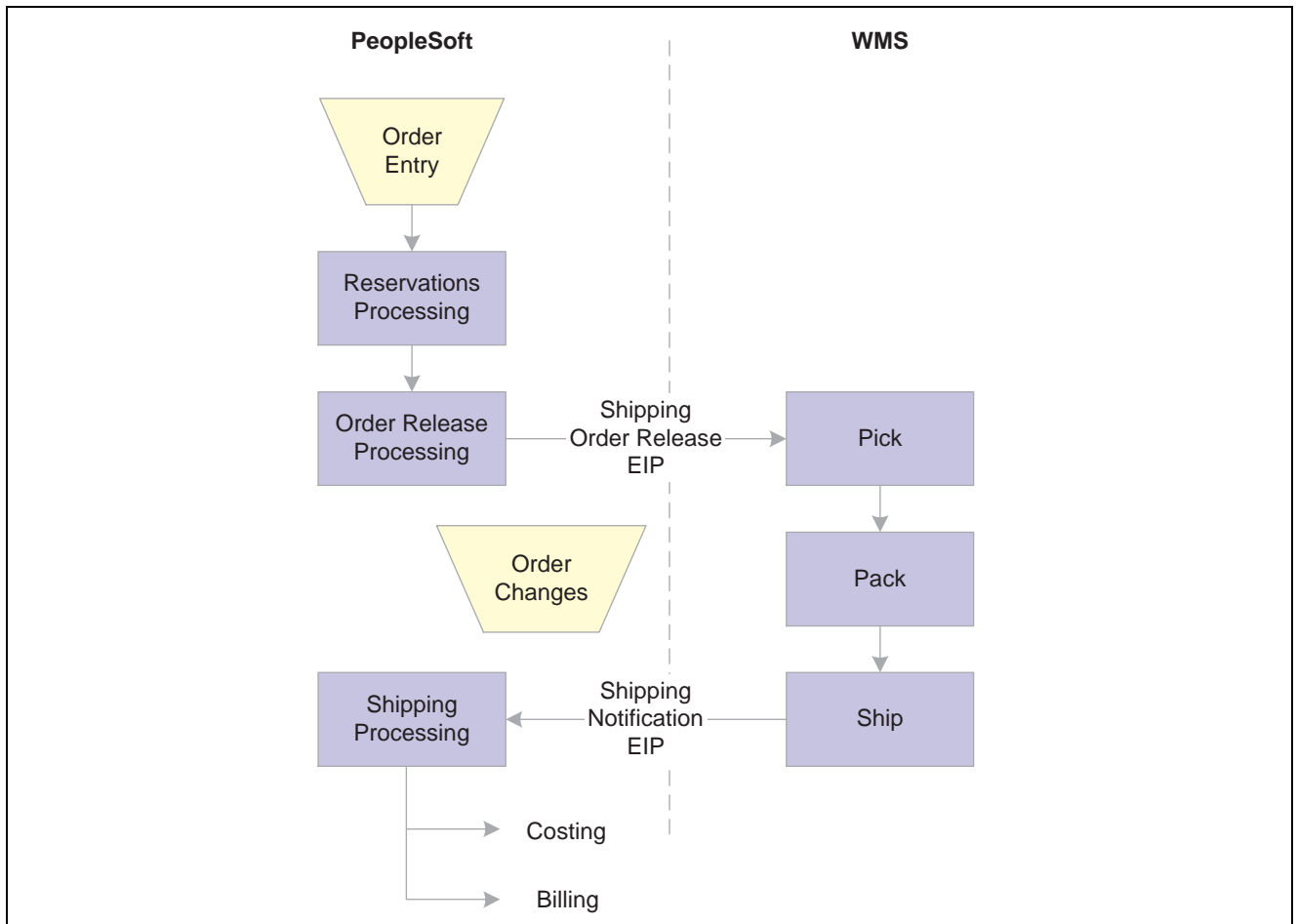
- Order entry.
- Reservation processing.
- Order release processing.
- Order changes.
- Shipping processing.

The order-to-cash business process enables companies to sell their goods and services to customers. Here is an overview of the process in a WMS integration:

1. PeopleSoft components are used to take the customer orders, reserve the orders against available quantity balances, and release the orders to the WMS.
2. In the WMS, the orders are picked, packed, and shipped to the customer.
3. PeopleSoft provides shipment tracking, advanced shipment notice transactions, costing, accounting, invoicing, and cash collection functions.

Order-to-Cash Process Flow in a WMS Integration

The following diagram shows how order-to-cash functions are performed in a WMS integration:



Order-to-cash processing

The EIPs that support the order-to-cash business process in a WMS integration are based on a number of assumptions. The following sections detail the assumptions for each phase of the order-to-cash business process.

Order Entry

In a WMS integration, orders are captured and staged for fulfillment in PeopleSoft tables. PeopleSoft Inventory enables you to capture demand for stock from many sources, including sales order entry functions in PeopleSoft Order Management and material stock requests accepted from other PeopleSoft business units and third-party applications.

Regardless of demand source, all orders that are staged for fulfillment in the PeopleSoft Inventory demand staging table, DEMAND_INF_INV, or directly inserted into the PeopleSoft Inventory demand management table, DEMAND_INF, can be processed in a WMS. However, orders issued with the Creating Express Issue Stock Requests in PeopleSoft Inventory cannot be processed in a WMS. Express issue orders bypass picking, packing, and shipping functions and are directly inserted into the PeopleSoft Inventory shipping history table, SHIP_INF_INV.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Creating Orders for Fulfillment”

PeopleSoft Inventory 8.8 PeopleBook, “Order Fulfillment Processing,” Understanding Fulfillment Processing

PeopleSoft Order Management 8.8 PeopleBook, “Introduction to Sales Order Entry”

Reservation Processing

Before the order can be released for picking in a WMS, the demand line for the order must be inserted into the PeopleSoft Inventory demand management table, DEMAND_INV. Inserting a demand line for an order into DEMAND_INV requires some form of reservation processing. PeopleSoft Inventory offers four types of reservation processing:

- Soft reservations.
- Non-soft reservations.
- Available-to-promise reservations.
- Lot allocations.

Lot Allocations

Lot allocations allocate quantity at the storage location level. On order release, the storage location information is sent to the WMS in the order release message. If PeopleSoft Inventory receives a transfer transaction for a lot-allocated item from the WMS, the transaction is rejected because allocated material cannot be transferred. Do not use lot-allocation processing if the WMS implementation has procedures that require transferring material from a storage location to a shipping area before sending the shipping notification message.

Back Orders

If back orders are permitted for orders, the back order processing takes place in PeopleSoft Inventory. Back order functionality in the WMS is not used in a WMS integration. If you allow order lines to ship with partial quantities, demand lines with the available portion of the requested quantity are inserted into DEMAND_INV, where they can be released for picking in the WMS.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Promising and Reserving Inventory”

Order Release Processing

In a WMS integration, generating a pick plan in PeopleSoft Inventory releases eligible orders to the WMS to be picked, packed, and shipped. For PeopleSoft Inventory business units under external warehouse control, the Picking Plan process inserts the demand lines associated with a pick batch ID into the released orders staging table, ORDER_REL_INV. Once orders are staged to this table, the Publish Outbound Message process can publish a message containing the order data to the WMS using the Shipping Order Release EIP.

The sort selections available from the Picking Plan Report page do not control the sequence of the orders in the shipping order release message. Order data in the order release message sent to the WMS is separated into logical orders based on breaks in the following sort sequence:

1. Business unit.

2. Demand source.
3. Source business unit.
4. Order number.
5. Customer ID.
6. Ship to ID.
7. Address sequence code.
8. Carrier ID.
9. Ship via.

Note. If the Ship Using TMS Reference ID check box is selected on the Inventory Definition page then the orders released to the WMS system will be set up and sorted using the TMS Reference ID and TMS Reference ID Line Number.

Note. If the address information for an order is modified before order release, the address fields are added to the sort sequence.

For each logical order, there is a single order header that contains the address and shipping information for the order. The Picking Plan process assigns an external reference number to the order header. For each Picking Plan process run, the external reference numbers are assigned to order headers sequentially starting with 1. This number is also referenced on each demand line associated with the order header and can be viewed on the Stock Requests Inquiry page. The combination of the external reference number and the pick batch ID provides a unique key that the WMS uses to identify a specific order release transaction.

The order release message contains detailed information for each line on the order, including details of quantities allocated to specific items and storage locations. Lot detail for lot-allocated demand lines is always provided; however, quantity allocation for push picking plans is provided on an optional basis only.

The order release transaction in a WMS integration is the same for both pull and push picking plans. However, if you use a push picking plan, the quantities are allocated at the storage location level. If PeopleSoft Inventory receives a transfer transaction for an allocated item from the WMS, the transaction is rejected because allocated material cannot be transferred. Push picking plans should not be used if the WMS implementation has procedures that require transferring material from a storage location to a shipping area before sending the shipping notification message.

To delete an order line from a pick batch ID, you must manually delete the line in both PeopleSoft Inventory and the WMS. To delete the order line in PeopleSoft Inventory, use the Picking Feedback page. (This is the only circumstance in which the Picking Feedback page is used in a WMS integration.) If you do not also delete the order line in the WMS system and the line is returned to PeopleSoft Inventory on a shipping notification transaction, the line is rejected because it is no longer associated with the order.

The order release transaction does not include substitute item detail as provided on picking plans in PeopleSoft Inventory. However, all other notes tied to a picking plan are included in the order release message. In addition, the order release message includes any notes associated with the bill of lading to support WMSs that print their own bills of lading.

See Also

Chapter 2. “Managing PeopleSoft Supply Chain Management Integration Points,” page 9

PeopleSoft Inventory 8.8 PeopleBook, “Picking Inventory”

Order Changes

In general, once an order is released to the WMS, any changes made to the order in either the WMS or in the PeopleSoft system must be manually communicated between the two systems. The PeopleSoft system does not send any order change information to the WMS. Changes made to the order shipping information in the WMS for the carrier, shipping method, and freight terms are sent to the PeopleSoft system as part of the shipping notification message. Any other order changes made in the WMS, however, must be manually duplicated in the PeopleSoft system.

You can cancel an order line at any time until the order line has the status *Shipped* in PeopleSoft Inventory. However, in a WMS integration, first cancel the order in the WMS and then cancel the order in the PeopleSoft system using the Stock Request Cancel/Hold page. If an order canceled in PeopleSoft Inventory is actually shipped in the WMS, PeopleSoft Inventory rejects the shipping notification transaction received from the WMS. You cannot reverse an order cancellation in PeopleSoft Inventory.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Changing Orders”

Shipping Processing

When the WMS ships an order, it sends a shipping notification message to the PeopleSoft system using the Shipping Notification EIP. This message contains all the information necessary to pick, pack, and ship individual orders in the PeopleSoft system tables. In addition to providing basic information, the message creates single-level shipping containers and ship serial IDs.

Here is an overview of the process:

1. The shipping notification message is staged as a transaction in the PeopleSoft Inventory electronic data collection (EDC) transaction log (JRH_BCT_CTL and BCT_DTL).
2. The Inventory Picking process (INXPICK) pulls the shipping notification transaction from the EDC transaction log and performs all necessary validation before updating the system tables.
3. For orders flagged as *ship complete*, auto-ship processing is used to record the quantities picked and shipped in the PeopleSoft shipping history table, SHIP_INF_INV.

For orders that are not *ship complete*, the Shipping/Issues component in PeopleSoft Inventory can be used to enter any additional freight information before depletion and billing processing.

4. The Depletion process (INPDDEPL) in PeopleSoft Inventory completes the shipping operation.

The shipping notification message includes the shipment header and shipment lines. A shipment designated by a shipment header is defined as a shipment event for a single carrier ID, ship type ID, freight terms value, ship date, ship time, and bill of lading. These field values must be identical for all lines defined for the given instance of a shipment header.

The WMS must assign a shipping ID to the shipment before it can be processed in the PeopleSoft system. However, if the Ship ID field on the shipment header is left blank, the PeopleSoft system automatically assigns a shipping ID.

Note. A single release order line cannot be split across two different shipping IDs.

The ship flag in the shipment header determines whether the shipment is complete and ready for the Depletion process or whether it should be left open for additional processing within the PeopleSoft system. If the shipped lines received from the WMS are not shipped complete, you can use the Shipping/Issues component to alter the shipping information and to add freight charges before depletion and billing processing.

If changes are made in the WMS to the carrier, shipping method, or freight terms on the order, the changes are included in the shipping notification message sent to PeopleSoft Inventory.

Shipping History and Documentation

PeopleSoft collects and tracks shipping history based on the information from the shipping notification transaction. If a bill of lading number is sent to PeopleSoft Inventory in the shipping notification message, the PeopleSoft system updates the shipping history table, SHIP_INF_INV, for tracking purposes only. A bill of lading is not created in the PeopleSoft system.

In a WMS integration, the required shipping documentation is usually generated using the WMS; however, you can also generate this documentation using PeopleSoft components.

Orders for Kits

In a WMS integration, orders for kits can be processed in the WMS. However, due to restrictions in the auto-ship processing used for shipment notification transactions, the demand lines for the kit cannot be returned with a *Shipped* status. Instead, you must manually ship kits using the Shipping/Issues component in PeopleSoft Inventory.

See Also

Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” page 9

PeopleSoft Inventory 8.8 PeopleBook, “Picking Inventory,” Entering Picking Feedback Using an Electronic Data Collection System

PeopleSoft Inventory 8.8 PeopleBook, “Shipping Inventory”

PeopleSoft Inventory 8.8 PeopleBook, “Order Fulfillment Processing,” Understanding Fulfillment Processing

The Procure-to-Pay Business Process in a WMS Integration

This section discusses:

- Requisitions.
- Purchase orders.
- Purchase order expected receipts processing.

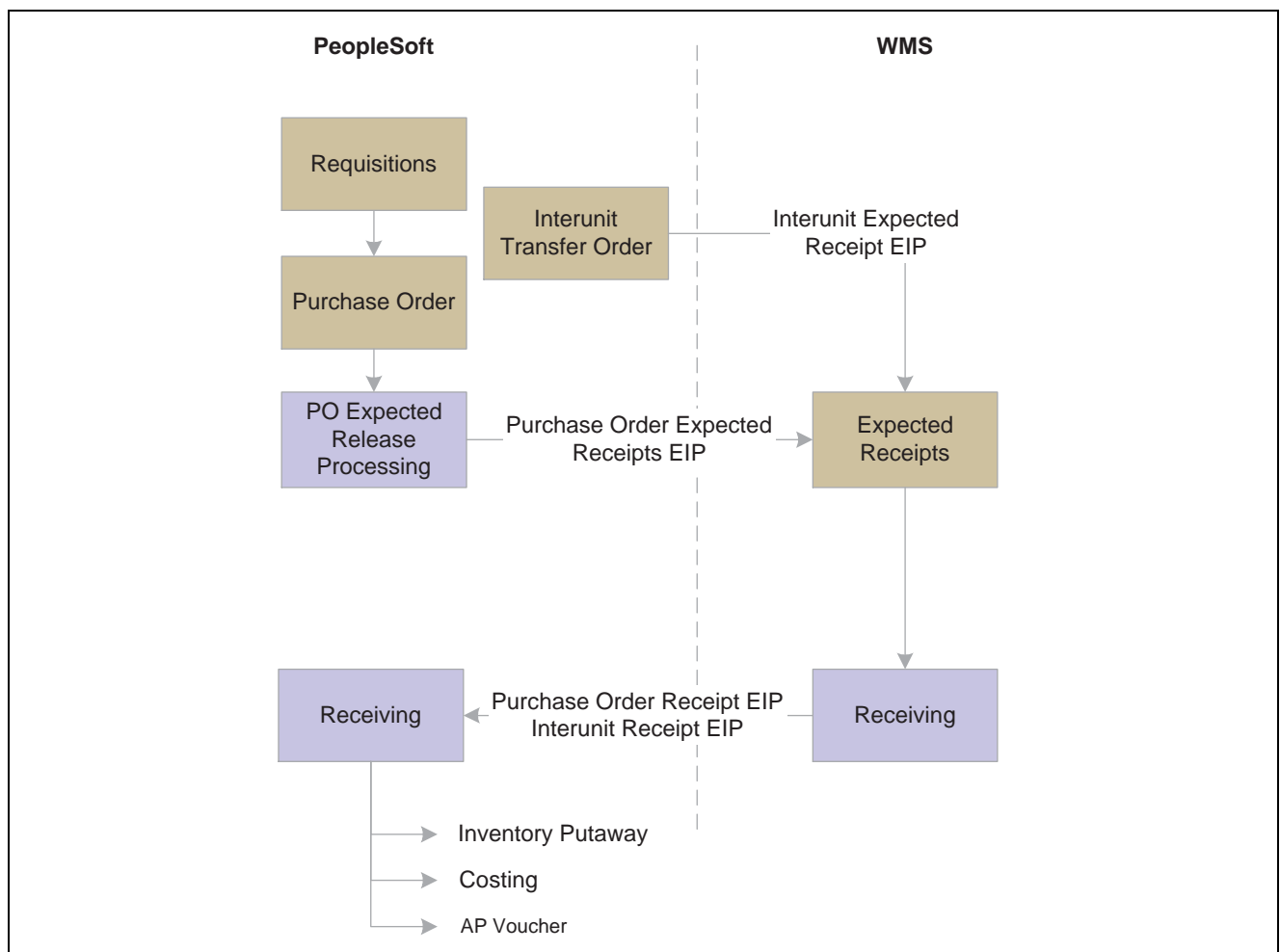
- Receiving.

The procure-to-pay business process enables companies to buy goods and services from their suppliers. Here is an overview of the process in a WMS integration:

1. PeopleSoft components are used to manage stock replenishment, create requisitions and purchase orders, and automatically source and dispatch the purchase orders.
2. When the requested stock on purchase orders arrives, the WMS handles the receiving, inspection, and putaway transactions for the stock.
3. The PeopleSoft system provides costing and accounts receivable functions.

Procure-to Pay Process Flow in a WMS Integration

The following diagram shows how the procure-to-pay functions are performed in a WMS integration:



Procure-to-pay processing

The EIPs that support the procure-to-pay business process in a WMS integration are based on a number of assumptions. The following sections detail these assumptions for each phase of the procure-to-pay business process.

Requisitions

Requisitions can be created in PeopleSoft Purchasing using a variety of methods. After a requisition is created, it moves through PeopleSoft Purchasing to become either a purchase order that is sent to a vendor or a demand that is staged in a PeopleSoft Inventory business unit. In a WMS integration, requisitions are created and maintained in the PeopleSoft system. Requisitions are not sent to the WMS.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, “Understanding Requisitions”

Purchase Orders

As with requisitions, purchase orders can be created in PeopleSoft Purchasing using a variety of methods. After they are approved and sourced, purchase orders are dispatched to vendors.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, “Understanding Purchase Orders”

Purchase Order Expected Receipts Processing

For purchase orders that will be received by a business unit under external warehouse control, the PeopleSoft system publishes an expected receipts message using the Purchase Order Expected Receipts EIP. When receiving the stock from a purchase order, the WMS matches the actual receipt against the data in the expected receipts message.

An expected receipts message is sent to the WMS for dispatched purchase orders that are expected to be received within a user-defined period. If a change is made to a purchase order that has been included in a previous expected receipts message, another expected receipts message is published when the change event occurs. This includes closing or canceling the purchase order. When the WMS receives an expected receipts message for a purchase order with a *Closed* or *Canceled* status, the corresponding expected receipt transaction in the WMS can also be closed or canceled.

The expected receipts transaction includes purchase order header, order line, schedule line, and comment information. The expected receipt line segment includes an order quantity field that represents the total of the associated schedule lines. The schedule line segment contains a combination of specific purchase order line, schedule, and distribution information. Purchase order comments and notes segments are provided at the header, line, and schedule levels.

Note. The order quantity on the receipt line is provided for WMSs that cannot handle the three-level purchase order structure (header, line, and schedule). In this case, the WMS uses the purchase order line-level receipt variation (Transaction Code 0103) of the purchase order receipt transaction.

In the PeopleSoft system, there are two types of purchase order expected receipt messages:

- The first type contains expected receipt information for a specific PeopleSoft Inventory business unit.

For example, you may have a single purchase order line with an order quantity of 75 units that are distributed among three different PeopleSoft Inventory business units for a quantity of 25 units each. Three different purchase order expected receipt transactions containing an order line quantity of 25 are generated, one for each inventory business unit. This is the transaction that is used in most WMS implementations, because most WMSs expect purchase order information for the specific business unit under their control.

- The second type contains expected receipt information for a specific ship to location.

In this case, the expected receipts are grouped by ship to location instead of business unit. Using this second type of purchase order expected receipt transaction in the preceding example, the system generates a single transaction for a total quantity of 75 units.

The Processing Outbound Application Message Transactions publishes the purchase order expected receipt messages for expected receipt transactions for all PeopleSoft Inventory business units or ship to locations on purchase orders that meet specified selection criteria.

Only the Process Outbound Message process publishes purchase order expected receipt messages. An expected receipt transaction cannot be generated from the Return to Vendor - RTV page. This constraint has the following implications for a WMS integration:

- When you reopen a purchase order in PeopleSoft, no message is sent to the WMS to reopen the purchase order; however, if you make a change to the reopened purchase order, the system sends an expected receipt message to the WMS, where the purchase order has a *Closed* status.

To resolve this discrepancy, you can set up the WMS to reopen a purchase order automatically if an expected receipt transaction is received for a closed purchase order. Alternatively, for business units under WMS control, the option to reopen purchase orders for vendor returns—the RTV Reopen PO option—can be disabled in the PeopleSoft system on the Purchasing Definition - Business Unit Options page.

- When you perform a vendor return in PeopleSoft Purchasing, you can return a quantity for replacement.

When you select the return-for-replacement option, the quantity that was received is reduced by the quantity you are returning for replacement. This logic makes the open quantity on the purchase order equal to the returned quantity. However, because no expected receipt message is sent to the WMS from the Return to Vendor - RTV page, the new open quantity is not reflected in the WMS. To resolve this discrepancy, you can either:

- Enable the WMS to over-receive—that is, to allow receipts greater than the original order quantity.

This solution requires that the WMS be able to receive against a closed purchase order. If the purchase order was originally closed in the PeopleSoft system and then reopened from the RTV page, the status of the purchase order remains closed in the WMS.

- Disable the RTV Adjust Source option on the Purchasing Definition - Business Unit Options page.

When you disable this option, the receipt quantity (Net Receive Qty) is not decreased when you return for replacement from the Return to Vendor - RTV page. With this solution, after entering the return-to-vendor information, you add a new schedule for the replacement quantity on the Purchase Order - Form page. The change on the Purchase Order Form page generates an expected receipts message, which provides the WMS with an open quantity against which to receive.

Interunit Transfer Expected Receipts Processing

Interunit transfer orders are created in the PeopleSoft system to move stock between business units. An interunit expected receipt message is generated by the Process Outbound Message process using the Interunit Expected Receipt EIP. This occurs when an interunit transfer order has a destination business unit that is under external warehouse control and the transfer order is depleted. The WMS uses the information from the interunit expected receipt message to validate the receipt of goods when the shipment arrives at the destination warehouse.

The interunit expected receipt message includes receipt header information and receipt lines with details of each item that was shipped.

In PeopleSoft Inventory, you can cancel in-transit interunit transfer orders using the Interunit Cancellations page. For transfer orders that have been sent out on previous interunit expected receipt messages, the cancellation transaction generates an interunit expected receipt message with a status of *Cancel*.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, “Creating Requisitions Online,” Creating Requisition Lines

PeopleSoft Inventory 8.8 PeopleBook, “Transferring Stock Between Business Units”

Receiving

In a WMS integration, all receiving, inspection, and putaway activities are performed using the WMS. To confirm that stock has been received for a purchase order or an interunit transfer, the WMS sends a receipt confirmation message to the PeopleSoft system using the Purchase Order Receipt EIP or the Interunit Receipt EIP.

For both purchase order and interunit receipts, the receipt confirmation message includes header information and receipt lines with details about what was physically received at the business unit under WMS control.

The WMS can include the receipt ID and receipt line number in either of the receipt confirmation messages. To ensure that receipt IDs assigned by the WMS are unique, define a range of ID numbers during implementation for exclusive use by the WMS. If the receipt ID is not included on the confirmation message, the PeopleSoft system generates one automatically.

If either of the receipt confirmation messages includes the storage location data, the item is put away to the specified storage location. Otherwise, the item is put away using the putaway rules defined for the business unit.

Blind receipts from a WMS are not accepted. All receipt confirmation messages that the WMS sends must have a valid purchase order number or interunit ID number.

In PeopleSoft Purchasing, the Receiver Load process (PO_RECVLOAD) processes the purchase order receipt confirmation transactions. The Receiver Load process can accept purchase order receipts at either the purchase order line or schedule level. During a WMS implementation, consider these processing rules when deciding how best to use this functionality:

- When working at the schedule level, the Receiver Load process receives the full quantity against a given schedule line number.

When working at the line level, the Receiver Load process applies the full quantity received to the first open schedule for that line unless the Allow Receipt Load Cascade option is enabled to cascade receipts across multiple schedules. If the cascading feature is enabled, any full quantity is applied to the first schedule, and any excess quantity is applied to the next schedule, and so on until the full quantity is consumed. You set the Allow Receipt Load Cascade option on the Purchasing Definition - Business Unit Options page.

- The inventory business unit is included in the receipt transaction to associate the receipts to the appropriate distribution line.

If the inventory business unit is included on the transaction, the receipt affects only the quantity for the business unit's distribution line. If the inventory business unit is blank, the quantity received is received against each distribution line until the entire quantity for the schedule is received.

The Interunit Receiving process (INPJURV) processes the interunit transfer receipt confirmation transactions. When an interunit receipt is completely received and closed, an interunit expected receipt message is generated with a status of *Received*. The *Received* status on the transaction indicates that the transfer order can be closed in the WMS system.

See Also

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

PeopleSoft Purchasing 8.8 PeopleBook, “Receiving Shipments”

Four-Wall Warehousing Functions in a WMS Integration

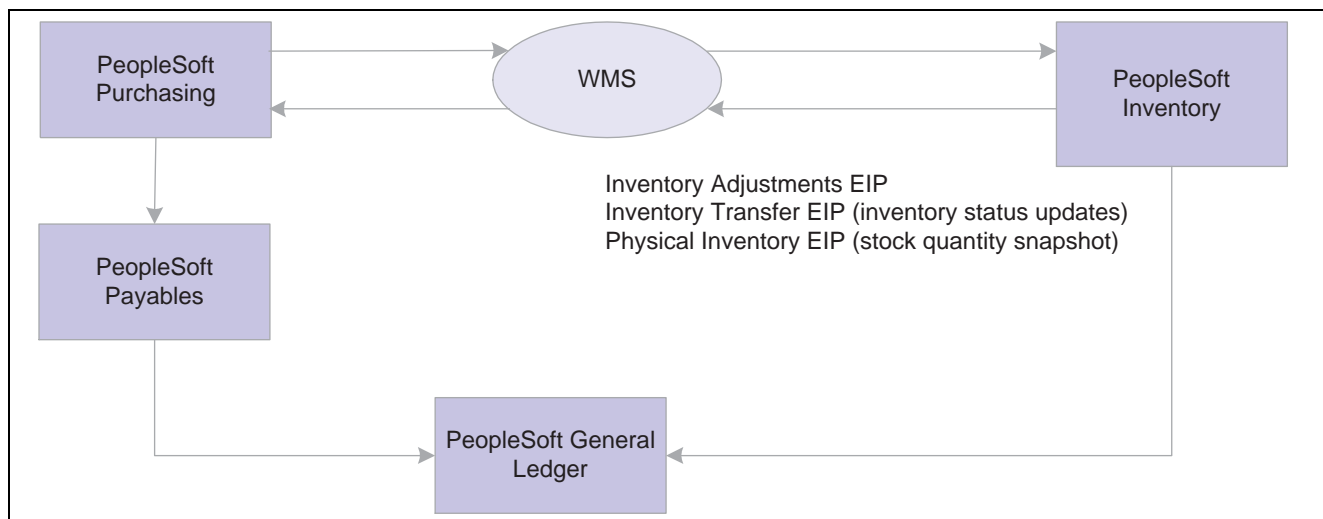
This section discusses:

- Inventory adjustments.
- Storage location transfers (inventory status updates).
- Physical inventory (stock quantity snapshots).

Four-wall functions are material management activities bounded by the four walls of a specific warehouse, including performing cycle counts and full physical inventory counts, adjusting quantities for specific storage locations, replenishing fixed picking locations, and making any other stock transfers between storage locations. In a WMS integration, all four-wall functions are performed in the WMS and then reported to the PeopleSoft system by using application messages.

Process Flow for Four-Wall Warehousing Functions in a WMS Integration

The following diagram shows the process flow for four-wall application messages in a WMS integration:



Four-wall warehousing functions

The EIPs that support the four-wall functions in a WMS integration are based on a number of assumptions. The following sections detail the assumptions for each function.

Inventory Adjustments

Messages about inventory quantity adjustment transactions are generated from the WMS using the Inventory Adjustment EIP. The inventory adjustment message notifies PeopleSoft Inventory of quantity changes required for defective, found, or lost stock. This transaction is a simple quantity adjustment for an item in a particular storage location.

Distribution types on the adjustment transaction are used for inventory accounting. Some WMSs have charge codes that match up to the distribution type fields. However, if the WMS charge codes differ from the distribution types established in PeopleSoft Inventory on the Distribution Type page, the WMS charge codes must be converted to match the PeopleSoft distribution types when the transaction is mapped. If the distribution type field is left blank, the PeopleSoft system uses the default distribution type established for the selected adjustment type on the Default Distribution Type page.

Note. ChartField overrides are not permitted for adjustment transactions.

Storage Location Transfers (Inventory Status Updates)

To notify PeopleSoft Inventory of material transfers between storage locations, the WMS generates inventory transfer messages using the Inventory Transfer EIP. In a typical WMS integration in which quantity balances are tracked only at the business unit level in the PeopleSoft system, the inventory transfer messages sent to the PeopleSoft system change the status of the stock to *Open* or *Hold*. In PeopleSoft Inventory, two storage locations are defined in the PHYSICAL_INV table: one for quantity with an *Open* status and another for quantity with a *Hold* status. Inventory status change transactions originating from the WMS must be translated to map to the Storage Location Transfers message by identifying the *Open* and *Hold* locations that are used in the PeopleSoft system.

Physical Inventory (Stock Quantity Snapshots)

To synchronize quantity balances between the two systems, the WMS uses the Physical Inventory EIP to send PeopleSoft Inventory a stock quantity snapshot message that reflects the current stock quantity balances for the business unit. In PeopleSoft Inventory, this message is processed as a physical inventory transaction. You can use the quantity balances in the message to run a reconciliation report and stock quantity update process, just as you would for a cycle or physical count performed for an PeopleSoft Inventory business unit that is not integrated with a WMS.

Because the success of the WMS integration relies on synchronous quantity balances between the two systems, a quantity balance synchronization procedure should be performed as often as feasible.

Synchronizing Quantity Balances

Here are steps for synchronizing quantity balances between PeopleSoft Inventory and a WMS:

1. In the WMS, perform a counting event and use the Physical Inventory EIP to send PeopleSoft Inventory a message that reflects the current quantity count.

A counting event can be for all items in the WMS or for a specific item, lot, or storage location. Each stock quantity snapshot message includes header information for the counting event and lines detailing the count quantity and storage location information for each item counted. On message receipt, PeopleSoft Inventory loads the counting event data into the electronic data collection transaction tables.

Note. The message sent using the Physical Inventory EIP is used to perform periodic checks of the quantity balance synchronization between the two systems. There is no expectation that an actual cycle count or physical inventory count has occurred in the WMS. The Physical Inventory EIP is not used to communicate quantity balance changes from a physical inventory or cycle counts in the WMS. In these cases, the WMS sends PeopleSoft Inventory an adjustment message using the Inventory Adjustments EIP.

2. Run the Physical Inventory process (INPIPHYS) to move the counting event data to the count table (COUNT_INV) in PeopleSoft Inventory.

Set up run control parameters for the Physical Inventory Load process on the Physical Inventory Process page under the Manage Data Exchanges menu.

3. Run the Physical Accounting Reconciliation report to detect any discrepancies between the two systems.

Set up run control parameters for the Physical Accounting Reconciliation report on the Reconciliation Report page. If you find a discrepancy and do not want to accept the adjustment, you can use the Item Counts page to change the status of the counting event line to exclude it from the Stock Quantity Update process (INPOPOST).

4. Run the Stock Quantity Update process to update the quantities in PeopleSoft Inventory.

Set up run control parameters for the Stock Quantity Update process on the Stock Quantity Update Process page.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Performing Physical Accounting”

Static Information Updates in a WMS Integration

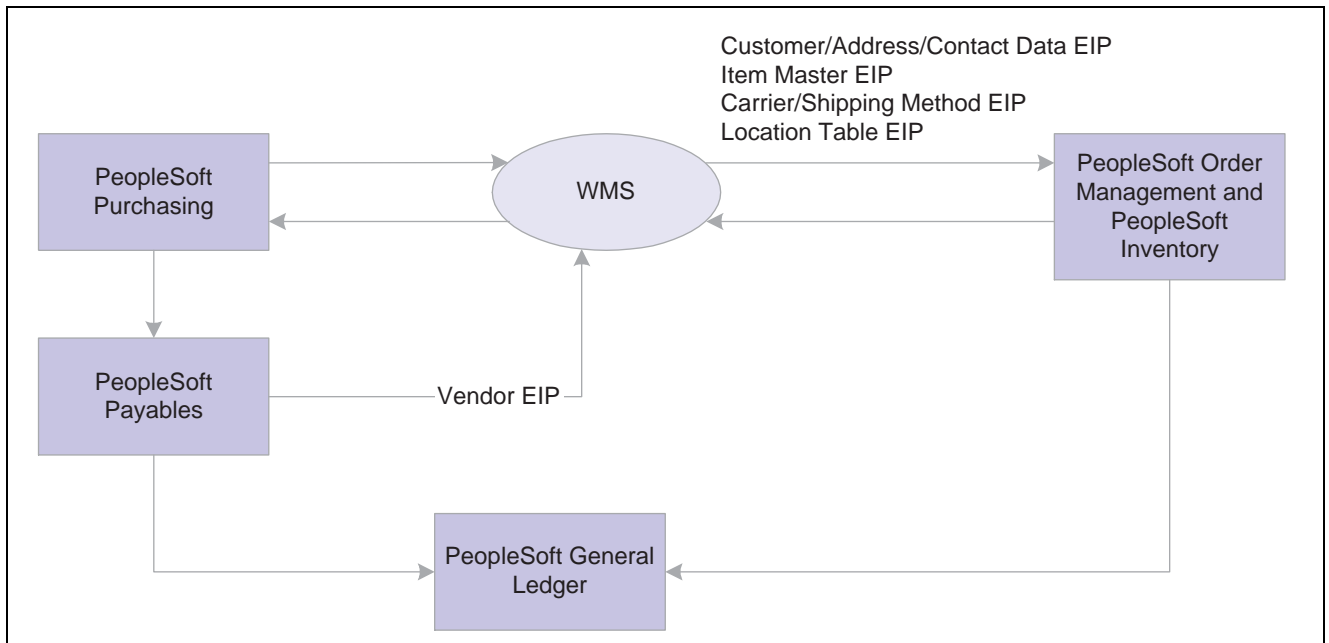
This section discusses:

- Customer data.
- Vendor data.
- Item data.
- Carrier and shipping method data.
- Location data.

Static information includes data about customers, vendors, items, carriers, and locations. In a WMS integration, all static information is maintained in the PeopleSoft system and update messages are sent to the WMS as necessary. If a change is made to any part of the static information in the PeopleSoft system—even to a field that does not exist on the outbound message—a message indicating a change event is sent to the WMS.

Process Flow Static Information Transfers in a WMS Integration

The following diagram shows the process flow for static information transfers in a WMS integration:



Static information transfers in a WMS integration

The EIPs that support the static information updates in a WMS integration are based on a number of assumptions. The following sections detail these assumptions for each static data type.

Customer Data

Using the Customer/Address EIP, the PeopleSoft system publishes updates for customer-related information to the WMS when a customer record is created, changed, or inactivated. The message includes customer master and address information and may be filtered based on the PeopleSoft setID.

See Also

PeopleSoft Working with Customers and Orders 8.8 PeopleBook, “Maintaining General Customer Information”

Vendor Data

Using the Vendor EIP, the PeopleSoft system publishes updates for vendor-related information to the WMS when a vendor record is created, changed, or inactivated. The message may be filtered by the PeopleSoft setID.

See Also

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

Item Data

Using the Item Master EIP, the PeopleSoft system publishes updates for item-related information to the WMS when an item record is created and set to an approved status, or when changes are made to the item after it has reached an approved status. The message includes item master, item detail, unit of measure, purchasing attributes, business unit attributes, and business unit weight and volume information for approved items only. The item data in the message may be filtered by both the PeopleSoft setID and business unit.

See Also

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Items”

Carrier and Shipping Method Data

Using the Carrier/Shipping Method EIP, the PeopleSoft system publishes updates for carrier-related information to the WMS when a carrier record is created or changed. The message includes carrier master information and is filtered by the PeopleSoft setID.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Defining Financials and Supply Chain Management Common Definitions,” Setting Up Freight Carriers

Location Data

Using the Location Table EIP, the PeopleSoft system publishes updates for location-related information to the WMS when a location record is created or changed. The message includes location master information and is filtered by the PeopleSoft setID. The locations are established on the Location - Location Definition page in the PeopleSoft system to identify the address of an internal location that can receive interunit transfer orders. The WMS uses the location on interunit transfer orders as it would the customer ID on customer sales orders.

PART 5

Integrating to Healthcare Applications

Chapter 7

Integrating With a Third-Party Point-of-Use Supplier System

Chapter 8

Integrating With a Third-Party Surgical Resource Software Application

CHAPTER 7

Integrating With a Third-Party Point-of-Use Supplier System

This chapter provides an overview of point-of-use (POU) supplier systems and discusses how to:

- Define par location data for the POU supplier and the PeopleSoft system.
- Manage item replenishment data in the POU supplier and the PeopleSoft system.
- Restock a POU supplier.
- Use POU supplier enterprise integration points (EIPs).

Understanding POU Supplier Systems

This section discusses:

- General assumptions about POU supplier systems.
- Definition of items and par locations.
- Chunking Rules for streamlining POU supplier integration processes.
- POU suppliers as par locations in PeopleSoft Inventory.
- Returns to vendors (RTVs) for POU supplier items.

You can integrate PeopleSoft Inventory par location functionality with POU supplier systems. This integration consists of generic EIPs, using PeopleSoft Application Messaging publish and subscribe technology to exchange applicable par location, item counts, and expected receipt information between the PeopleSoft system and the POU supplier.

This chapter describes the implementation of a full integration between POU medical supply dispensing cabinets and PeopleSoft. The use of POU supplier systems for issuing medical supplies is prevalent in today's typical hospital environment. POU supplier systems maintain available stores of medical supplies for the immediate and ad hoc needs of a hospital's surgical, nursing, and distribution staff during normal operations. A POU supplier system maintains on-hand quantities at all times and records patient usage as it occurs.

A POU supplier system can be a complete standalone system, but it is usually integrated with a hospital's materials management information system (MMIS), such as PeopleSoft Inventory and PeopleSoft Purchasing. Integrating a POU supplier system with an MMIS can help a healthcare organization achieve maximum benefit from its investments on both fronts.

In this integration scenario, the PeopleSoft system is responsible for:

- Defining and maintaining the par location and item information.

- Issuing stock from inventory to the par locations.
- Performing the receipt of purchased goods.
- Replenishing the materials to the par locations.

The POU supplier systems are responsible for:

- Keeping track of the stock on hand in the POU locations.
- Capturing the use of the medical supplies issued.

That use can in turn be charged directly to a specific patient's account. If the charges are made directly to patient accounts, the POU supplier system is also usually integrated with the hospital's patient accounting or clinical systems.

See Also

PeopleSoft Enterprise Components

Assumptions About POU Supplier System Integration

The POU supplier system integration works as designed only if you understand the following assumptions and your system complies with them:

- Because patient usage is recorded in the POU supplier system and not in PeopleSoft Inventory, the material usage and reconciliation feature in PeopleSoft Inventory should not be used.

Any reconciliation procedures must be handled by the POU supplier system.

- If you use POU supplier systems in some locations and PeopleSoft Inventory par locations in others, and if you plan to use the consumer usage feature, you need to set up two feeds to the admission, discharge, and transfers and patient billing systems: one from PeopleSoft and one from the POU supplier system.
- If a POU supplier is reconfigured—for example, if bins are removed, added, or moved—the physical reconfiguration of the POU supplier needs to occur first, followed by the manual online maintenance of the par location in PeopleSoft Inventory.

The Par Location EIP application messages are then published to update the supplier accordingly.

- All par locations, whether integrated with a POU supplier system or not, are replenished using the PeopleSoft Inventory Par Location Replenishment process (INPGCDMD).

Definition of Items and Par Locations for a POU Supplier Integration

All item and par location data is set up and maintained in the PeopleSoft system. However, a successful integration with a POU supplier depends on understanding how the POU supplier system uses the fields that you define in the PeopleSoft system. Here are two important points to keep in mind:

- The charge code and the usage tracking method (charge type) are required fields for every item in the par location for use with POU supplier systems.

Because the POU suppliers pass patient usage information directly to a patient billing system, these two pieces of information are vital. Both fields are part of the par location definition created in the Par Location Definition component, and they are included in the par location application messages that PeopleSoft Inventory sends to the POU supplier system.

- The same item can exist in a par location in both the PeopleSoft system and POU supplier system.

The compartment in the PeopleSoft system and the bin in the POU supplier both identify the unique location of an item in the POU par location. The POU supplier's bin is a system-generated, assigned field and the PeopleSoft system's compartment field cannot be fed into it. The POU supplier system needs to process the PeopleSoft compartment information separately to avoid data update conflicts.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Tracking Material Usage”

Chunking Rules for Streamlining POU Supplier Integration Processes

You can use the PeopleSoft chunking methodology to reduce the volume of application messages that are sent in the outbound publishing process. Chunking enables you to segment a message by business unit and location or par location and define which nodes receive the specific messages. This functionality is especially helpful if not all of your subscribing nodes need to receive application messages published by all departments. For example, you can set up processes so that business units and locations that exist as subscribers in third-party systems receive only application messages that are specifically published for them according to the chunking rules and node maps that you implement.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Broker

POU Suppliers as Par Locations in PeopleSoft Inventory

Rather than setting up POU suppliers as PeopleSoft Inventory business units, you can set up your system to track POU suppliers as par locations within PeopleSoft Inventory. In this case, par location replenishment transactions for affected items must be subject to the same replenishment rules in PeopleSoft Inventory or PeopleSoft Purchasing.

However, the PeopleSoft system is not responsible for consumer charges because POU supplier systems pass this information to the consumer accounting system. The direct purchase and direct inventory issue processes to the POU suppliers should remain as originally designed in the PeopleSoft system.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Managing Par Inventory”

RTVs for POU Supplier Items

A PeopleSoft Purchasing RTV should be created if an incorrect item is delivered for replenishing a POU supplier. This kind of mistake is typically discovered at the main loading dock of the healthcare facility. However, if the item has already been received into PeopleSoft Purchasing, a message will have already been published to the POU supplier system. In this case, the POU supplier never receives the shipment and the system never fills the PO Receipt Notification application message that is issued for the item.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, “Managing Vendor Returns”

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

Defining Par Location Data for the POU Supplier and the PeopleSoft System

This section discusses the procedures and application functions that are used to maintain par location data in PeopleSoft Inventory and the POU supplier system. Here are steps for defining and maintaining the par location data:

1. Decide on and document the specifications for the POU supplier configuration.

You build the POU supplier system based on the specifications (for example, compartment sizing, capacity, and so forth). Thoroughly document the system requirements.

2. Create par locations in the PeopleSoft system that correspond to the POU supplier.

Once you determine the configuration of the supplier and build the POU supplier system, create the corresponding par location in the PeopleSoft system by using the Par Location Definition component. You set up and maintain all item and par location data in the PeopleSoft system.

3. Run the Full Data Publish process to initially populate the POU supplier with item data.

Use the Full Data Publish process (available under the Manage Integration Rules menu) to publish a full-data replication of the par locations for the initial implementation by using the PAR_LOCATION_FULL_SYNC application message. Run this process after the par locations are defined. This application message is used to initially populate the POU supplier with par location item data.

4. Save changes to the Par Location Definition component to update the POU supplier.

All subsequent changes saved to the Par Location Definition component for existing par locations are sent to the POU supplier in partial-data replication application messages (PAR_LOCATION_SYNC) using the Par Location EIP. These partial-data replications are published when saving the Par Location Definition component to keep the POU supplier current with ongoing PeopleSoft Inventory par location definitions and item changes.

See Also

Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” page 9

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

PeopleSoft Enterprise Components, “Enterprise Integration”

Managing Item Replenishment Data in the POU Supplier and the PeopleSoft System

This section discusses the procedures and application functions used to manage item replenishment data in POU suppliers and PeopleSoft. Here is the process for managing item replenishment data:

1. The POU supplier system tracks on-hand quantity and material usage.

The POU supplier system maintains on-hand quantities for each of its par location items set up in the PeopleSoft Inventory Par Location Definition component, and it records consumer material usage throughout the day.

2. The POU supplier system publishes on-hand par location count application messages to PeopleSoft Inventory.

The POU supplier uses the Par Location Count EIP to publish on-hand par location count application messages to PeopleSoft Inventory. This publication occurs at user-requested intervals from the POU supplier to provide the PeopleSoft system with current on-hand quantities for each item in the POU par locations.

3. PeopleSoft Inventory subscribes to the on-hand par location count application messages from the POU supplier system.

PeopleSoft Inventory uses the Par Location Count EIP to subscribe to this application message. Once the data is received, the PeopleSoft system updates the par location count tables and the par location count information is ready to be processed using the Par Location Replenishment process (INPGCDMD).

Note. Any existing POU supplier-based replenishment processes are not used in this integration.

4. Run the Par Location Replenishment process (INPGCDMD) in PeopleSoft Inventory.

The Par Location Replenishment process takes each par location count and replenishes items that fall below the par level that you identify on the Par Location Definition - Line page. A purchase order, requisition, or material stock request is created in the PeopleSoft system to replenish the stock to par levels.

5. Deplete the material stock requests created to replenish a POU supplier.

For material stock requests that have issued stock from inventory to the par location and have been depleted, the Internal Location Expected Receipt EIP publishes an application message to the POU application using the IN_PUB_MSG Application Engine process.

6. Receive direct-purchase items with the Receiving component in PeopleSoft Purchasing.

Receiving material against a purchase order in the Receiving component in PeopleSoft Purchasing triggers the publication of an application message to the POU supplier using the Purchase Order Receipt Notification EIP. This message identifies all direct-purchase items and quantities that have been received and are delivered to specified locations. The Receipt Push process (RECV_PUSH) loads the stage table (RECV_PUSH_NTFY). If a chunking rule for the message name and publish rule exists on the publish rule definition table (EO_MSGPUBDEFN), then the system creates staging records for only those par location receipt transactions that have the par location defined on the par location chunking table (IN_BU_PAR_EOC). If the chunking rule does not exist, then staging records are created for all par location receipt transactions. Once the stage table is loaded, it calls the program that in turn publishes the receipt notification message.

See Also

Chapter 2. “Managing PeopleSoft Supply Chain Management Integration Points,” page 9

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

Chapter 8. “Integrating With a Third-Party Surgical Resource Software Application,” page 169

PeopleSoft Inventory 8.8 PeopleBook, “Managing Par Inventory,” Replenishing Par Locations

Restocking a POU Supplier

This section discusses the typical procedure used to physically restock POU supplier systems. Here are the steps:

1. Generate the appropriate reports for the material to be restocked at the POU supplier.

Typically, the technician assigned to restock the POU supplier is prompted through the POU supplier restock event by the light guides on the POU supplier unit. The lights are activated based on the information in the application messages sent using the Internal Location Expected Receipt EIP (outbound) or Purchase Order Receipt Notification EIP (outbound).

For item issues out of inventory, the Shipping Document Report page (INC6503) can be requested to accompany the delivery of the stock items to the POU par location. For purchased items, the Receiver Delivery report (POY5030) can be generated to accompany the stockless and non-stock items to the POU par location.

The restock technician can then use these reports along with the light guides on the POU to ensure that the par locations are updated with the correct quantities.

2. Compare expected receipts with actual receipts, and record discrepancies.

When restocking a light-guided POU supplier, the technician follows the lights on the POU supplier and, for each item, verifies that the quantity displayed—that is, the expected receipt quantity—is the same as the actual quantity received. If the quantity received is different from the expected quantity, the technician records the variation on the report.

3. Manually restock the POU bin or compartment with the received stock.

The technician refills the bins or compartments in the POU supplier with the received stock.

4. Complete the restocking event in the POU supplier system.

The final step of the restocking event takes place in the third-party POU supplier system. Typically, the technician updates the POU supplier system with the actual quantities that are used to restock the POU supplier bins or compartments.

Using POU Supplier EIPs

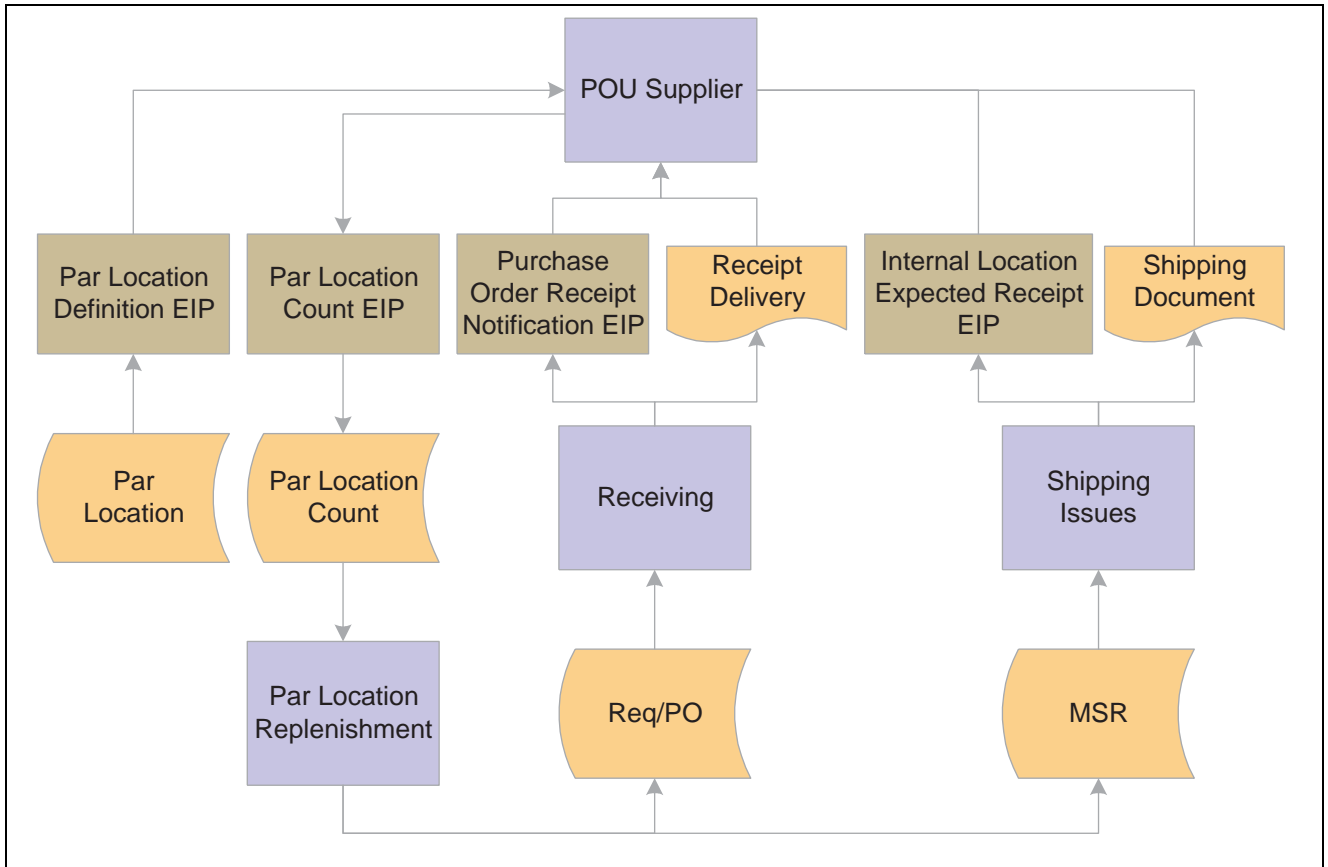
Four EIPs are used to exchange data between the PeopleSoft Inventory and the POU supplier systems. They are:

- Par Location EIP (outbound).

- Par Location Count EIP (inbound).
- Internal Location Expected Receipt EIP (outbound).
- Purchase Order Receipt Notification EIP (outbound).

Following the Data Flow Between the PeopleSoft System and the POU Supplier System

The following diagram illustrates the data flow in a POU supplier integration:



POU supplier integration with a PeopleSoft system

See Also

Chapter 7, “Integrating With a Third-Party Point-of-Use Supplier System,” Defining Par Location Data for the POU Supplier and the PeopleSoft System, page 164

Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” page 9

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

Managing Subscription Errors for POU EIPs

Error management is integral to the effectiveness of inbound EIPs in the PeopleSoft system. In the process of uploading application messages, the PeopleSoft subscription process detects any data errors and stores them in application message queues or staging tables for manual correction in the PeopleSoft system before updating any core PeopleSoft application tables.

Each of the inbound EIPs facilitating the subscription of application messages from third-party applications has its own transaction code that must be entered on an assigned data management page to access the EIP's specific error-correction page.

The Par Location Count EIP, which is used in both surgical resource system and POU supplier system integrations, uses the transaction code *Par Loc*, which is entered on the Transaction Maintenance page. You use the Transaction Maintenance page to access error-correction pages for transactional data.

See Also

Chapter 2, "Managing PeopleSoft Supply Chain Management Integration Points," page 9

CHAPTER 8

Integrating With a Third-Party Surgical Resource Software Application

This chapter provides an overview of surgical resource software (SRS) applications and discusses how to:

- Define assumptions of an SRS application integration.
- Define items and par locations for an SRS application integration.
- Use chunking to streamline your SRS application integration processes.
- Create RTVs for surgical resource par location items.
- Implement an SRS application integration.
- Use SRS application EIPs.
- Manage errors for SRS EIPs.

See Also

PeopleSoft Enterprise Components

Understanding SRS Applications

SRS applications:

- Manage a variety of medical resources.
- Ensure that proper medical supplies are available at surgical facilities when needed.
- Handle scheduling to ensure that physicians and supporting staff are available at the correct place and time to perform surgical procedures.

Defining Assumptions of an SRS Application Integration

The SRS application integration is based on the following assumptions:

- Because patient usage is recorded in the SRS application and not in PeopleSoft Inventory, the material usage and reconciliation feature in PeopleSoft Inventory should not be used.

Any reconciliation procedures must be performed in the SRS application.

- You set up dual feeds if you use an SRS application in some surgical resource locations and PeopleSoft Inventory par locations in others, and you use the patient usage feature in PeopleSoft.

Set up the two feeds from the admissions, discharges, and transfers and patient billing systems—one to the PeopleSoft system and one to the SRS application.

- All par locations, whether integrated with an SRS application or not, are replenished using the PeopleSoft Inventory Par Location Replenishment process (INPGCDMD).

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Managing Par Inventory,” Replenishing Par Locations

Defining Items and Par Locations for an SRS Application Integration

All item and par location data is set up and maintained in the PeopleSoft system. However, a successful integration with an SRS application depends on understanding how the SRS application uses the fields that you define in the PeopleSoft system.

A charge code and usage tracking method (charge type) are required fields for every par location item that is used with an SRS application. Because the SRS application passes patient usage directly to a patient billing system, these two pieces of information are vital. Both of these fields are a part of the par location definition created in the Par Location Definition component, and they are included in the par location application messages that PeopleSoft Inventory sends to the SRS application.

When you define a par location in PeopleSoft Inventory, the par location ID appears by default in the location field. For the SRS application integration, it is imperative that you do not overwrite this default value. When direct purchase requests are passed to PeopleSoft Purchasing through the Purchase Order Requisition EIP (PURCHASE_REQUISITION_LOAD), the par location ID is used as the location.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Tracking Material Usage”

Using Chunking to Streamline SRS Application Integration Processes

You can use PeopleSoft chunking methodology to reduce the volume of application messages sent in the outbound publish process. Chunking enables you to segment the message by business unit and location or par location and to define which nodes receive the specific messages. This functionality is useful if only some of the subscribing nodes need to receive application messages published by all departments. For example, you can set up your processes so that business units and locations that exist as subscribers in third-party systems receive only those application messages that are specifically published for them according to the chunking rules and node maps that you implement.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Broker

Creating RTVs for Surgical Resource Par Location Items

A PeopleSoft Purchasing return to vendor (RTV) should be created if an incorrect item is delivered for replenishing a surgical resource par location. This mistake is usually discovered at the main loading dock of the healthcare facility. However, if the item has already been received into PeopleSoft Purchasing, a message will have already been published to the SRS application. In this case, the surgical resource par location never receives the shipment and the system never fills the PO Receipt Notification application message issued for that item.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, “Managing Vendor Returns”

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

Implementing an SRS Application Integration

This section discusses how to:

- Define par location data for the SRS application and the PeopleSoft system.
- Stock case carts from a surgical resource par location.
- Maintain item replenishment data in the SRS application and the PeopleSoft system.
- Restock a surgical resource par location.

Defining Par Location Data for the SRS Application and the PeopleSoft System

This section describes the procedures and application functions used to maintain par location data in PeopleSoft Inventory and the SRS application.

To maintain par location data in PeopleSoft and the SRS application:

1. Create surgical resource par locations in PeopleSoft Inventory.

Define the operating room resource locations as par locations in PeopleSoft Inventory using the Par Location Definition component. All item and par location data is set up and maintained in the PeopleSoft system.

2. Run the Full Data Publish process to initially populate the SRS application with item data.

Use the Full Data Publish process to publish a full-data replication of the par locations for the initial implementation using the PAR_LOCATION_FULL_SYNC application message. This process should be run once the par locations are defined. You use this application message to initially populate the SRS application with par location item data.

3. Save changes to the Par Location Definition component to update the SRS application.

All subsequent changes saved to the Par Location Definition component for existing par locations are sent to the SRS application in partial-data replication application messages (PAR_LOCATION_SYNC) using the Par Location Definition EIP. These partial-data replications are published when saving the Par Location Definition component to keep the SRS application current with ongoing PeopleSoft Inventory par location definition and item changes.

See Also

Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” page 9

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

PeopleSoft Enterprise Components, “Enterprise Integration”

Stocking Case Carts From a Surgical Resource Par Location

This section describes the tasks performed to stock a case cart in an integration of a PeopleSoft system and a third-party SRS application.

To stock a case cart for a procedure:

1. Schedule the surgical procedure in the SRS application.

Typically, the operating room (OR) nurse or assistant schedules a procedure in the SRS application and defines a case cart of the required supplies for the procedure by using the preference cards defined for a physician or surgeon.

2. Run the material requisition process in the SRS application to source supplies required for upcoming procedures in PeopleSoft.

Several days before the procedure, a materials requisition process in the SRS application identifies all of the items needed for the procedure. For the required items with on-hand quantity below par, the SRS application publishes an application message containing the required quantities needed for the procedure.

PeopleSoft Purchasing subscribes to this application message using the Purchase Order Requisition EIP. This message provides the PeopleSoft system with the information to enable the direct purchase of miscellaneous items needed for a particular procedure. This information includes the item ID, requested quantity, unit of measure, location (that is, the SRS storage location and PeopleSoft par location), due date (the procedure date), and case ID. The case ID is for trace purposes, and it is stored in the Description field (DESCR254) in the Comments table (PO_RQLD_CMT_SEG) in the EIP.

A Subscription PeopleCode agent subscribes to the requisition messages and performs a bulk insert into the PeopleSoft Purchasing requisition staging tables (PO_REQLOAD_RQST and PO_REQLOAD_CMT). The Purchasing Requisition Loader process (PO_REQLOAD) picks up the staged requisitions and inserts those with no data errors into the PeopleSoft Purchasing requisition tables for sourcing.

If the Purchasing Requisition Loader process discovers errors in the requisition message (such as data type inconsistency), the entire message is rejected. If there are application errors, the data is inserted and you can use the error-correction page to correct the data.

Requests for non-stock items that have been staged to the PeopleSoft system are designated as processed in the SRS application. If the material requisitioning process is run again before the procedure is performed, requisitions for items below par are not duplicated. However, if additional quantities of requested items are required or if new items are needed, a new requisition message is published and staged to PeopleSoft Purchasing.

If the original requisition quantity is decreased or canceled in the SRS application, the OR nurse or assistant can produce a cancellation report using the SRS application. This report identifying the canceled stock quantities can be sent to the materials management director, who can manually update the PeopleSoft system with the required changes. This might include canceling a requisition or modifying the requested quantity. If the vendor has already shipped the order or if the order has been received, it might require a return-to-vendor transaction.

To facilitate finding the purchase order associated with the procedure that was canceled, the case ID is passed on in the application messages exchanged in the Purchase Order Requisition EIP.

Based on setID, vendor priority, and item attributes, PeopleSoft Purchasing sources the requested item using the PeopleSoft Purchasing distribution network, and it creates purchase orders for stockless items as well as material stock requests in PeopleSoft Inventory for stock items if the stock is available.

3. Receive and deliver the requested stock quantities to the surgical resource location.

Non-stock and stockless items are received using components in PeopleSoft Purchasing and delivered to the surgical resource location that generated the request for the item. Stock items are issued to the surgical resource par location from PeopleSoft Inventory.

4. At the surgical resource location, pick materials required for the case cart.

The day before the procedure, the OR nurse or assistant generates a pick list using the SRS application. The pick list is used at the surgical resource par location to retrieve the materials required to stock the case cart for the procedure.

Depending on internal rules and regulations, material that is not consumed from the case cart can be returned to the surgical resource par location, where it can be picked for another procedure.

See Also

Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” page 9

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

PeopleSoft Inventory 8.8 PeopleBook, “Changing Orders”

PeopleSoft Inventory 8.8 PeopleBook, “Creating Orders for Fulfillment,” Creating Express Issue Stock Requests

Maintaining Item Replenishment Data in the SRS Application and the PeopleSoft System

Here’s how to manage item replenishment data in the SRS application and the PeopleSoft system:

1. Use the SRS application to track material usage and on-hand quantity adjustments for the surgical resource par location.

After a procedure, the OR nurse or assistant records consumer material usage in the SRS application and adjusts par on-hand quantities for applicable surgical resource par locations.

2. Use the SRS application to publish on-hand par location count application messages to PeopleSoft Inventory using the Par Location Count EIP.

This publish occurs at user-requested intervals from the SRS application to provide the PeopleSoft system with current on-hand quantities for each item in the surgical resource par locations.

3. Use PeopleSoft Inventory to subscribe to the on-hand par location count application messages from the SRS application.

PeopleSoft Inventory subscribes to this application message using the Par Location Count EIP. Once the data is received, the PeopleSoft system updates the par location count tables and the par location count information is ready to be processed using the Par Location Replenishment process.

Note. Any existing SRS application-based replenishment processes are not used in this integration.

4. Run the Par Location Replenishment process in PeopleSoft Inventory.

The Par Location Replenishment process takes each par location count and replenishes those items that fall below the par level identified for the item on the Par Location Definition - Line page. A purchase order, requisition, or material stock request is created in the PeopleSoft system to replenish the stock to par levels.

5. Deplete the material stock requests created to replenish a surgical resource par location.

For material stock requests that have issued stock from inventory to the par location and have been depleted, the Internal Location Expected Receipt EIP publishes an application message to the SRS application by using the IN_PUB_MSG Application Engine process.

6. Receive direct-purchase items with the PeopleSoft Purchasing Receiving component.

Receiving material against a purchase order in the PeopleSoft Purchasing Receiving component triggers the publication of an application message to the SRS application using the Purchase Order Receipt Notification EIP. This message identifies all direct-purchase items and quantities that have been received and are delivered to specified locations. The Receipt Push process (RECV_PUSH) loads the stage table (RECV_PUSH_NTIFY). If a chunking rule for the message name and publish rule exists in the publish rule definition table (EO_MSGPUBDEFN), then the system creates staging records for only those par location receipt transactions that have the par location defined in the Par Location Chunking table (IN_BU_PAR_EOC). If a chunking rule does not exist, then staging records are created for all par location receipt transactions. Once the stage table is loaded, it calls the program that in turn publishes the receipt notification message.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Managing Par Inventory,” Replenishing Par Locations

[Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” page 9](#)

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

Restocking a Surgical Resource Par Location

This section describes the typical procedure used to physically restock a surgical resource par location.

To physically restock a surgical resource par location:

1. Generate the appropriate reports for the material being restocked at the surgical resource par location.

For item issues out of inventory, the IN Shipping Document (inventory shipping document) report (INC6503) can be requested to accompany the delivery of the stock items to the surgical resource par location. For purchased items, a Receiver Delivery report (POY5030) can be generated to accompany the stockless and non-stock items to the par location. This report, along with the application message acknowledgment of the items sent, ensures that the par locations are updated with the correct quantities.

2. Compare expected receipts against actual receipts and record discrepancies.

When restocking a surgical resource location, verify that the quantity delivered to the location is the same as the quantity expected. If the actual quantity received is different from the expected quantity, record the variation on the report.

3. Manually restock the surgical resource par location's bin or compartment with the received stock.

Refill the bins or compartments in the surgical resource location with the received stock.

4. Complete the restocking event in the SRS application.

The final step of the restocking event takes place in the third-party SRS application. Typically, the person restocking the surgical resource par location updates the SRS application with the actual received quantities that are used to restock the bins or compartments in the surgical resource par location.

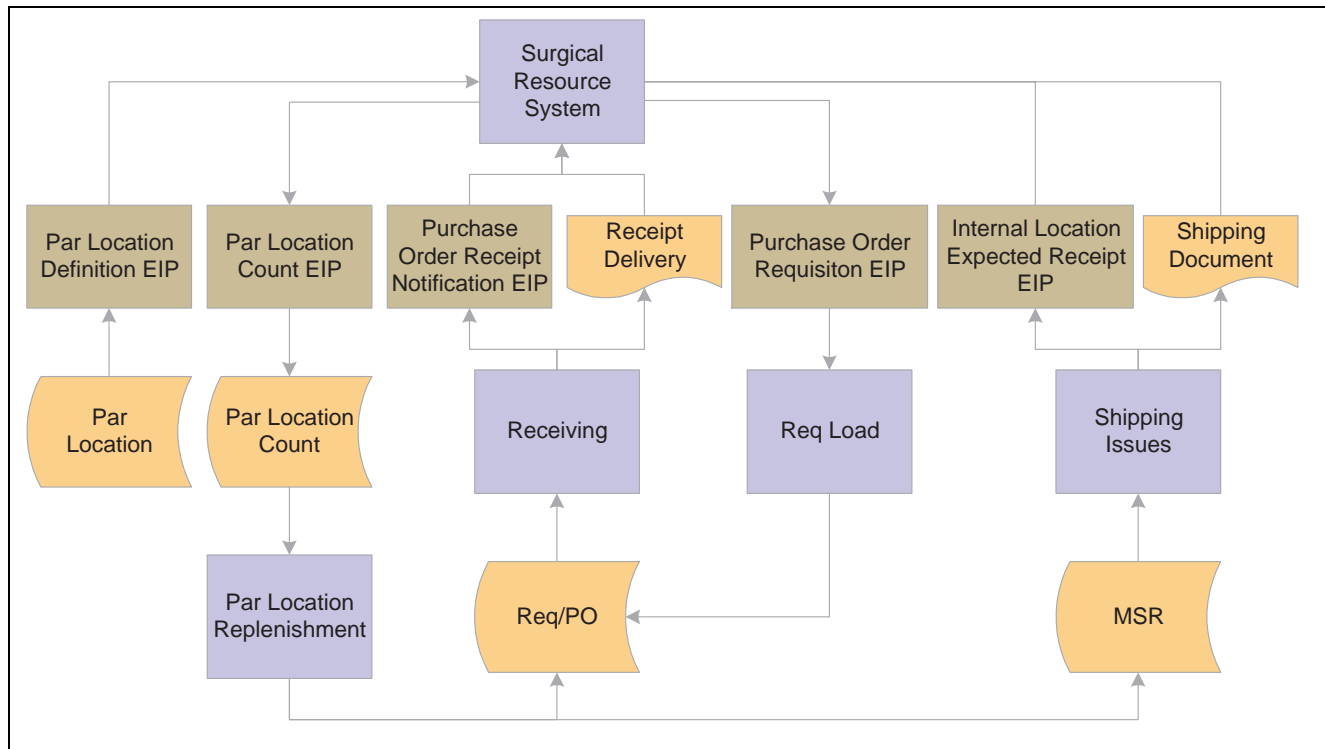
Using SRS Application EIPs

Five EIPs are used to exchange data between PeopleSoft Inventory and an SRS application. This section discusses the data flow and provides cross-references to information about the functional role and features of the following EIPs:

- Par Location EIP (outbound).
- Par Location Count EIP (inbound).
- Purchase Order Requisition EIP (inbound).
- Internal Location Expected Receipt EIP (outbound).
- Purchase Order Receipt Notification EIP (outbound).

Data Flow Between the PeopleSoft System and the SRS Application

The following diagram illustrates the data flow in an SRS application integration:



SRS application integration with a PeopleSoft system

SRS Application EIPs

This table provides cross-references to information about the functional role and features of the SRS EIPs.

Enterprise Integration Point	Reference
Par Location EIP (Outbound)	<p>See Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” page 9.</p> <p>See Chapter 8, “Integrating With a Third-Party Surgical Resource Software Application,” Implementing an SRS Application Integration, page 171.</p> <p>See http://www.peoplesoft.com/corp/en/products/technology/oif/eip_catalog.jsp</p>
Par Location Count EIP (Inbound)	<p>See Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” page 9.</p> <p>See Chapter 8, “Integrating With a Third-Party Surgical Resource Software Application,” Implementing an SRS Application Integration, page 171.</p> <p>See http://www.peoplesoft.com/corp/en/products/technology/oif/eip_catalog.jsp</p>

Enterprise Integration Point	Reference
Purchase Order Requisition EIP (Inbound)	<p>See Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” page 9.</p> <p>See Chapter 8, “Integrating With a Third-Party Surgical Resource Software Application,” Implementing an SRS Application Integration, page 171.</p> <p>See http://www.peoplesoft.com/corp/en/products/technology/oif/eip_catalog.jsp</p>
Internal Location Expected Receipt EIP (Outbound)	<p>See Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” page 9.</p> <p>See Chapter 8, “Integrating With a Third-Party Surgical Resource Software Application,” Implementing an SRS Application Integration, page 171.</p> <p>See http://www.peoplesoft.com/corp/en/products/technology/oif/eip_catalog.jsp</p>
Purchase Order Receipt Notification EIP (Outbound)	<p>See Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” page 9.</p> <p>See Chapter 8, “Integrating With a Third-Party Surgical Resource Software Application,” Implementing an SRS Application Integration, page 171.</p> <p>See http://www.peoplesoft.com/corp/en/products/technology/oif/eip_catalog.jsp</p>

Managing Errors for SRS EIPs

Error management is an integral part of the effectiveness of the PeopleSoft system of inbound EIPs. In the process of uploading application messages, the PeopleSoft subscription process detects any data errors and stores them in application message queues or staging tables for manual correction in the PeopleSoft system before updating any core PeopleSoft application tables.

Each inbound EIP that handles subscription of application messages from third-party applications has a respective transaction code that must be entered on an assigned data management page. The data management page allows access to the EIP’s specific error correction page.

The Par Location Count EIP, which is used in both the SRS and point-of-use (POU) supplier system integrations, uses the transaction code *Par Loc*, which is entered on the Transaction Maintenance page. The Transaction Maintenance page is used to access error-correction pages for transactional data.

The Purchase Order Requisition EIP, which is used in the SRS integration, uses the transaction code *REQLOAD*, which is entered on the Data Definition Maintenance page. The Data Definition Maintenance page is used to access error-correction pages for definitional data.

See Also

[Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,”](#) page 9

PART 6

Integrating to Electronic Data Collection Systems

Chapter 9
Designing an Electronic Data Collection System

Chapter 10
Using an Electronic Data Collection System

Chapter 11
Understanding Record Layouts for the Electronic Data Collection System

CHAPTER 9

Designing an Electronic Data Collection System

This chapter provides an overview of electronic data collection and discusses how to:

- Set up electronic data collection defaults.
- Set up labels.
- Set up the Uniform Code Council/European Article Numbering (UCC/EAN) manufacturer ID.
- Set up the wedge command code.
- Set up unit of measure.
- Set up picking.
- Set up putaway.

Understanding Electronic Data Collection

Electronic data collection offers many advantages. It enables you to:

- Increase the accuracy of data entry.
- Decrease the amount of time spent on data entry.
- Improve productivity.
- Save cost.

PeopleSoft applications use electronic data collection for key material movement transactions and support for bar code printing on standard reports and labels. You can use the electronic data collection components to capture data from multiple sources, such as bar code devices, external feeds, and direct data entry.

Bar code-enabled material movement transactions are based on an open architecture so that you can select the data collection solution for use with PeopleSoft applications. With this architecture, third-party or in-house data collection hardware and software can feed transactions originating from data collection devices into the PeopleSoft system using a common, predefined interface.

See Also

Chapter 10, “Using an Electronic Data Collection System,” page 185

Setting Up Electronic Data Collection Defaults

To use an electronic data collection system with PeopleSoft applications, you must first set up system default information.

See [Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” Setting Up Electronic Data Collection Defaults, page 35](#).

Setting Up Labels

To setup labels for data collection, use the Data Collection Label Setup component. You must first select a label type to access the Data Collection Label Setup page. For example, you might select Container ID Label as the label type to identify containers at storage locations.

This section discusses how to set up data collection labels.

See Also

[Chapter 10, “Using an Electronic Data Collection System,” Generating Labels, page 191](#)

Pages Used to Set Up Labels

Page Name	Object Name	Navigation	Usage
Data Collection Label Setup	BCT_LABEL_FS	Data Exchanges, Barcode Labels, Setup Data Collection Labels, Data Collection Label Setup	At the setID level, identify valid label formats that may be required when interfacing with a third-party label printing application.

Setting Up Data Collection Labels

Access the Data Collection Label Setup page.

Format ID

Enter an ID for a unique label design. A label type can have many format IDs. However, a format ID is not required. If the label printing application does not require a format ID, use this page to define the prefix and suffix for the file name of the label extract file.

The format ID can be anything that you choose. If the label printing application does not require a format ID in the extract file, then the format ID is for your reference only. If the label printing application does require a format ID in the extract file, you would enter the format ID that the application uses and select the Include Format check box.

The file name has an xxxyyyyzzzz format, where xxx is the file prefix, yyyy is the last five characters of the process instance ID, and zzzz is the file suffix. For example, if the file prefix is *GEN* and the suffix is *.LBL*, then the flat file generated by process instance 12345 would be named GEN12345.LBL.

Default	Select to set a format ID as the default that appears on the Label Generation page. If you do not select a default format ID, the first format ID listed becomes the default.
File Prefix	Enter the prefix for the file name of flat files generated for printing labels. This is an optional field
File Suffix	Enter the suffix for the file name of any flat files generated for printing labels. If you want a period as part of the suffix, you must include it in the field. This is an optional field.
Include Format	If this check box is selected, the format ID is inserted as the first field on every row in the label extract file.

Setting Up the UCC/EAN Manufacturer ID

To identify a manufacturer ID and starting container number, use the UCC/EAN Manufacturer component. You need to specify the manufacturer ID and starting container number for the label printing application in order to create a standard bar code accessible to all companies in the trading chain.

This section discusses how to specify the manufacturing ID.

Pages Used to Set Up the UCC/EAN Manufacturer ID

Page Name	Object Name	Navigation	Usage
UCC/EAN Manufacturer ID	BCT_MFGID_SETUP	Data Exchanges, Barcode Labels, Setup UCC/EAN Manufacturer ID, UCC/EAN Manufacturer ID	Specify the manufacturer ID and starting container number.

Specifying the Manufacturer ID

Access the UCC/EAN Manufacturer ID page.

Manufacturer ID	Enter an ID that is included in the extract file for the shipping container labels so that it can be formatted by the label printing software to create an industry-standard bar code label.
Shipping Container Serial ID	Enter an ID to uniquely identify the shipping container. Enter the starting container number, with up to nine digits, or leave it blank to start at 1. The shipping container serial ID is included in the extract file for the shipping container labels so that it can be formatted by the label printing software to create an industry-standard bar code label.

Setting Up the Wedge Command Code

To set up wedge command codes use the Set Up Wedge Command Code component.

See *PeopleSoft Inventory 8.8 PeopleBook*, “Packing Orders for Shipment,” Using Wedge Commands in Packing Sessions.

Setting Up Unit of Measure

To associate items with units of measure use the Define Item component.

See *PeopleSoft Managing Items 8.8 PeopleBook*, “Working With Items,” Using Units of Measure.

Setting Up Picking

To set up picking use the Setup Fulfillment component.

See *PeopleSoft Inventory 8.8 PeopleBook*, “Setting Up Fulfillment Operations for the Business Unit,” Defining Business Unit Fulfillment Options.

Setting Up Putaway

To set up the Putaway Plan Report use the Putaway Plan Report component.

See *PeopleSoft Inventory 8.8 PeopleBook*, “Receiving and Putting Away Stock,” Generating the Putaway Plan Report.

CHAPTER 10

Using an Electronic Data Collection System

This chapter provides an overview of electronic data collection and discusses how to:

- Use electronic data collection transactions.
- Use background transaction processes.
- Purge transactions.
- Generate labels.
- Manage files.

Understanding Electronic Data Collection

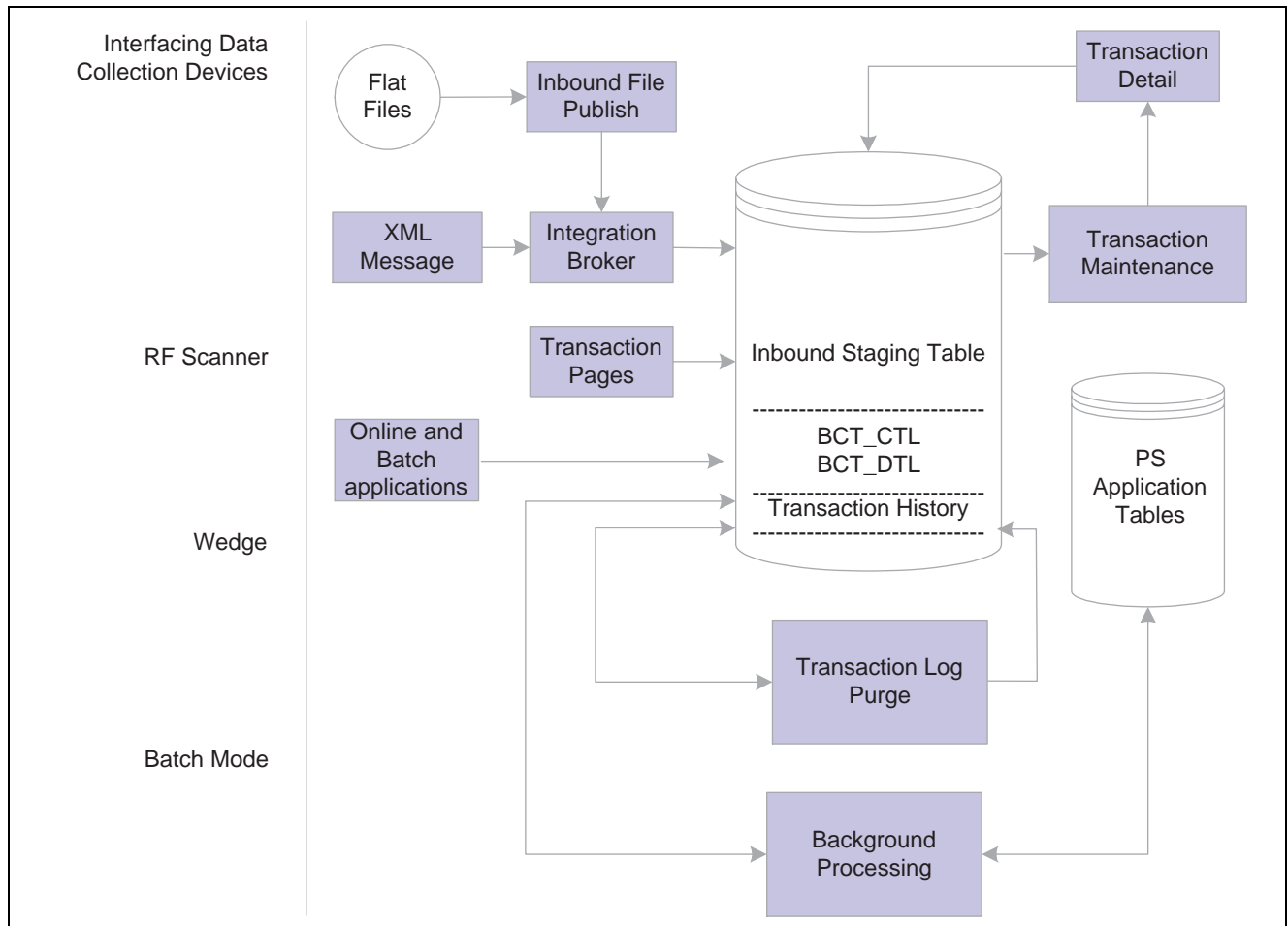
Electronic data collection enables you to:

- Increase the accuracy of data entry.
- Decrease the amount of time spent on data entry.

You can use the electronic data collection components to capture data from:

- Bar code devices.
- External feeds.
- Direct data entry.

The following diagram shows the data flow for electronic data collection:



Electronic data collection data flow

See Also

[Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,”](#)
[Using Transaction Maintenance, page 36](#)

[Chapter 10, “Using an Electronic Data Collection System,” Purging Transactions, page 191](#)

Device Selection

The first step in designing an electronic data collection system is to select the data collection devices you will use to process bar code material movement transactions. PeopleSoft provides support for three bar code technologies:

Radio Frequency

Radio frequency (RF) systems are used when immediate access to the database is required. This technology requires RF terminals and controllers. RF data collection applications, developed in-house or by third-party vendors, produce transactions that are passed to the PeopleSoft applications through PeopleSoft Integration Broker using XML messages.

Batch

Batch systems are used when real-time updates are not needed. Batch-oriented data collection applications, developed in-house or by a third-party vendor, produce transactions that are collected in an ASCII text file. The text file is loaded into the PeopleSoft system using the Inbound File Publish utility.

Keyboard Wedge

Keyboard wedges can be used when the person collecting the bar-coded information has access to a workstation running the PeopleSoft application. A wand or a laser gun connects to the keyboard wedge that inputs the bar-coded information directly into the transaction pages. The computer interprets information entered using the keyboard wedge in the same manner as information entered using the keyboard.

See Also

Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” Processing Inbound Application Message Transactions, page 13

Using Electronic Data Collection Transactions

Data collection transactions received through XML messages, batch oriented flat files, and the transaction pages are loaded into the transaction log. Background processes pick up these transactions, validate them, and then update the appropriate PeopleSoft application tables. If an error is found, the system does not process the transaction. The transaction’s status on the transaction log is changed to *Error*, and the system inserts a row into the error table for each error message.

The BCt Errors Workflow process (IN_WFBCTERRS) checks for electronic data collection transactions that have an error status and generates a worklist entry. Once you process the worklist entry, the PeopleSoft system displays the Transaction Maintenance page, where you can view the errors and fix them.

Once you have modified the transaction and saved the Transaction Maintenance Detail page, the transaction can be reprocessed. Transactions that have been processed to the *Complete* status or that have been canceled in the Transaction Maintenance page can be archived and purged from the transaction log using the transaction purge process.

The background processes validate all information before performing any updates. However, when you enter the transactions through the data collection transaction pages, selected pieces of information on the page have edits to verify the data that is entered.

Transactions	Reference
Inventory Adjustments	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Making Stock Quantity Adjustments and Transfers Within the Business Unit”.
Interunit Receiving	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Receiving and Putting Away Stock,” Staging Interunit Transfers Using an Electronic Data Collection System.

Transactions	Reference
Inventory Picking	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Picking Inventory,” Entering Picking Feedback Using an Electronic Data Collection System.
Inventory Putaway	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Receiving and Putting Away Stock,” Entering Stockroom Feedback Using an Electronic Data Collection System.
Inventory Transfer	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Making Stock Quantity Adjustments and Transfers Within the Business Unit”.
Kanban Transfers	See <i>PeopleSoft Flow Production 8.8 PeopleBook</i> , “Using Replenishment Sources,” Understanding the Kanban Transfer Process.
Ship Containers and Serial IDs	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Packing Orders for Shipment,” Working With Shipping Containers and Shipping Serial IDs Using an Electronic Data Collection System.
Shipping Request	See <i>PeopleSoft Inventory 8.8 PeopleBook</i> , “Shipping Inventory”. Process name = INV_FUL_BCT Page Name = BCT_INV_REQFUL *** Use for to find the link.
Production Picking	See <i>PeopleSoft Manufacturing 8.8 PeopleBook</i> , “Issuing Material to Production,” Processing Picking Plans Using Electronic Data Collection.
Kanban Replenishment Request	See <i>PeopleSoft Flow Production 8.8 PeopleBook</i> , “Maintaining Kanban Cards and Replenishment Requests,” Creating Replenishment Requests Using Electronic Data Collection.
Production Completions and Scrap	See <i>PeopleSoft Manufacturing 8.8 PeopleBook</i> , “Recording Completions and Scrap Using Electronic Data Collection,” Processing Electronic Data Collection Completions Transactions.
Production Multiple Outputs Completions and Scrap	See <i>PeopleSoft Manufacturing 8.8 PeopleBook</i> , “Recording Completions and Scrap Using Electronic Data Collection,” Processing Electronic Data Collection Completions Transactions.

Transactions	Reference
Kanban Completions	See <i>PeopleSoft Flow Production 8.8 PeopleBook</i> , "Using Replenishment Sources," Processing Kanban Completions.
Production Kit Issues and Returns	See <i>PeopleSoft Manufacturing 8.8 PeopleBook</i> , "Issuing Material to Production," Processing Kit Issues and Returns Using Electronic Data Collection.
Component Issues and Returns	See <i>PeopleSoft Manufacturing 8.8 PeopleBook</i> , "Recording Completions and Scrap Using Electronic Data Collection," Editing or Issuing Components Using Electronic Data Collection.
Actual Hours	See <i>PeopleSoft Manufacturing 8.8 PeopleBook</i> , "Recording Completions and Scrap Using Electronic Data Collection," Recording Actual Machine and Labor Hours.
Purchasing Receiving	See <i>PeopleSoft Purchasing 8.8 PeopleBook</i> , "Receiving Shipments," Receiving Using Electronic Data Collection.
Kanban Receiving	See <i>PeopleSoft Flow Production 8.8 PeopleBook</i> , "Using Replenishment Sources," Using the Receive by Kanban ID Transaction.

Using Background Transaction Processes

You set up electronic data collection background processes to scan the transaction log continuously as long as there are transactions in the log with the status *New* or *Reprocess*. If no transactions with the status *New* or *Reprocess* are in the log when a process scans the log, the process shuts down. If the process shuts down, you can restart it with PeopleSoft Process Scheduler. Because you can set up Process Scheduler to automatically restart the background processes at predefined intervals, transaction processing can occur continuously or at set periods throughout the day.

Transaction	Page Name	Process Name	Tables Accessed	Tables Updated
Inventory Adjustments	BCT_INV_REQIADJ	INPVIADJ	BCT_INV_REQIADJ	BCT_INV_REQIADJ
Interunit Receiving	BCT_INV_REQIURV	INPJURV	BCT_INV_REQIURV	BCT_INV_REQIURV

Transaction	Page Name	Process Name	Tables Accessed	Tables Updated
Inventory Picking and Shipping	BCT_INV_REQPICK	INXPICK	BCT_INV_REQPICK	BCT_INV_REQPICK
Inventory Putaway	BCT_NV_REQPWFB	INPZPTWY	BCT_NV_REQPWFB	BCT_NV_REQPWFB
Inventory Transfers	BCT_INV_REQTRFR	INPTTRFR	BCT_INV_REQTRFR	BCT_INV_REQTRFR
Physical Inventory	BCT_INV_REQPHYS	INPIPHYS	BCT_INV_REQPHYS	BCT_INV_REQPHYS
Ship Containers and Serial IDs	BCT_INV_REQSHPM	INPFSHPM	BCT_INV_REQSHPM	BCT_INV_REQSHPM
Shipping Request	BCT_INV_REQFUL	INV_FUL_BCT	RUN_CNTL_IN_FUL	RUN_CNTL_IN_FUL
Production Picking	BCT_MG_REQPIK	SFPEPICK	BCT_MG_REQPIK	BCT_MG_REQPIK
Kanban Replenishment Requests	BCT_MG_REQREPL	FPPAREPL	BCT_MG_REQREPL	BCT_MG_REQREPL
Production and Completions Scrap	BCT_MG_REQCOMP	SFPDCDRV	BCT_MG_REQCOMP	BCT_MG_REQCOMP
Kit Issues and Returns	BCT_MG_REQMISC	SFPFMISC	BCT_MG_REQMISC	BCT_MG_REQMISC
Actual Hours	BCT_MG_REQACT	SFPGACTH	BCT_MG_REQACT	BCT_MG_REQACT
Load Purchase Order Receipts	RUN_RECVLOAD	PO_RECVLOAD	RUN_CNTL_RECVLD	RUN_CNTL_RECVLD

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Making Stock Quantity Adjustments and Transfers Within the Business Unit”

PeopleSoft Inventory 8.8 PeopleBook, “Packing Orders for Shipment,” Working With Shipping Containers and Shipping Serial IDs Using an Electronic Data Collection System

PeopleSoft Flow Production 8.8 PeopleBook, “Maintaining Kanban Cards and Replenishment Requests,” Creating Replenishment Requests Using Electronic Data Collection

PeopleSoft Manufacturing 8.8 PeopleBook, “Issuing Material to Production,” Processing Picking Plans Using Electronic Data Collection

PeopleSoft Manufacturing 8.8 PeopleBook, “Recording Completions and Scrap Using Electronic Data Collection,” Processing Electronic Data Collection Completions Transactions

PeopleSoft Manufacturing 8.8 PeopleBook, “Issuing Material to Production,” Processing Kit Issues and Returns

PeopleSoft Manufacturing 8.8 PeopleBook, “Recording Completions and Scrap Using Electronic Data Collection,” Running the Actual Hours Data Collection (COBOL SQL) Process

Purging Transactions

You can periodically purge data collection transactions. The data collection architecture uses the standard purge process for PeopleSoft Supply Chain Management inbound transactions.

See Also

Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” Purging Transactions, page 39

Generating Labels

To generate bar code labels, you must first set up the attributes for each label type on the Label Setup page. Next, you generate a flat file containing the label data by running a PeopleSoft Process Scheduler Structured Query Report (SQR) program from the label-specific run control page. Use the Generate Labels component to create this flat file. Finally, you pass the flat file to an in-house or a third-party bar code label product to print the labels.

The PeopleSoft system can print 10 types of labels:

Purchasing Receipt labels	Use these labels to track items that are received by the business unit. Receiving labels are generated for each item on a receipt. To print these labels, you must have PeopleSoft Purchasing installed.
Production Completion labels	Apply these labels to items that have been manufactured. To print these labels, you must have PeopleSoft Production Management installed.

Pull Ticket labels	Use these labels to track material replenished from online replenishment requests. To print these labels, you must have PeopleSoft Flow Production installed.
Kanban Card labels	Use these labels to track material replenished by Kanban Card. To print these labels, you must have PeopleSoft Flow Production installed.
Storage Location labels	Use these labels on storage locations—such as aisles, rows, and bins—in a business unit. To print these labels, you must have PeopleSoft Inventory installed.
Item Storage labels	Use these labels to identify items in a carton or storage location. To print these labels, you must have PeopleSoft Inventory installed.
Storage Container labels	Use these labels to identify storage containers at a storage locations. To print these labels, you must have PeopleSoft Inventory installed.
Shipping Carton labels	Apply these labels to each carton before shipping to provide shipping information to shipping personnel and carriers. You can also use them to build shipping containers, and to provide customer-specific information that identifies items within the cartons. To print these labels, you must have PeopleSoft Inventory installed.
Shipping Serial labels	Use these labels to identify a serial ID assigned to items at the time the items are shipped. To print these labels, you must have PeopleSoft Inventory installed.
Shipping Container labels	Use these labels to identify shipping containers. Shipping container labels can be used to provide shipping information to shipping personnel, carriers, and customers. To print these labels, you must have PeopleSoft Inventory installed.
Item Usage labels	Use these labels to identify medical supplies used for patients. To print these labels, you must have PeopleSoft Inventory installed.

See Also

Chapter 9, “Designing an Electronic Data Collection System,” Setting Up Labels, page 182

Managing Files

This section discusses how you work with files when generating labels.

Override File

To specify a file directory and file name for the extraction file, select the Override File check box, and enter the file directory and file name. Leave the Override File check box clear to create the extraction file in the default directory with the default file name.

File Directory

Enter a directory path for the label file.

If you do not select the Override File check box, on any label except the Carton Label, the directory is selected according to the following hierarchy:

1. The directory name is the FILEPREFIX that was specified in SETENV.SQC during the initial system setup.

For information on setting the FILEPREFIX in the SETENV.SQC, refer to the *PeopleTools Installation and Administration* for the platform.

2. If no FILEPREFIX was specified during system setup, the directory name is by default the current work directory on the server running the label program.

File Name

Enter a file name for the label file.

If you do not select the Override File check box, on any label except the carton label, the file is named according to the following hierarchy:

1. The file name is the file prefix that is defined for the format ID (on the Data Collection Label Setup page in the Generate Labels window) combined with the last five digits of the process ID; the file name suffix is the file suffix defined for the format ID.
2. If no format ID is specified on the Data Collection Label Setup page, the last five digits of the process ID are used as the file name, and the file name suffix is the file suffix defined on the Data Collection Setup page in Process Transactions.
3. If no file suffix is defined on the Data Collection Setup page, the last five digits of the process ID are used as the file name, and the file name suffix is the FILESUFFIX that you specified in SETENV.SQC when you initially set up the system.

For information on setting the FILESUFFIX in the SETENV.SQC, refer to the installation documentation.

4. If no file suffix was specified in SETENV.SQC when you initially set up the system, the last five digits of the process ID are used as the file name, and no suffix is appended.

The following table indicates the sequence of defaults that the system uses when assigning file names:

File Prefix	File Name	File Suffix
Override	Override	Override
From format ID specified on the Data Collection Label Setup page.	The last five digits of the process ID. If multiple requests can be entered on the label request page, then an additional two-digit sequential number starting with 01 is appended to the end of the file name.	From format ID specified on the Data Collection Label Setup page.
None	The last five digits of the process ID. If multiple requests can be entered on the label request page, then an additional two-digit sequential number starting with 01 is appended to the end of the file name.	The file suffix defined on the Data Collection Setup page.

File Prefix	File Name	File Suffix
None	The last five digits of the process ID. If multiple requests can be entered on the label request page, then an additional two-digit sequential number starting with 01 is appended to the end of the file name.	The FILESUFFIX that you specified in SETENV.SQC.
None	The last five digits of the process ID. If multiple requests can be entered on the label request page, then an additional two-digit sequential number starting with 01 is appended to the end of the file name.	None.

See Also

Chapter 9, “Designing an Electronic Data Collection System,” Setting Up Labels, page 182

Chapter 10, “Using an Electronic Data Collection System,” Printing Shipping Carton Labels, page 201

Common Elements Used in This Section

Language	Select a language for the legible portion of the labels.
Business Unit or Unit	Select the unit for which to print labels.
Format ID	Enter a label format ID. Label formats are defined on the Data Collection Label Setup page. If you set up a default label format, it's ID appears in this field.
Copies	Enter the number of copies of each label to print. When printing serial or sequential labels, if you increase the number in this field, the system multiplies the number of labels that you print. For example, if you are printing six labels in a sequence, and the number of copies is 1, then six labels print. However, if the number of copies is 2, then two copies of each label print, for a total of 12 labels.

Pages Used to Print Labels

Page Name	Object Name	Navigation	Usage
Purchasing Receipt Labels	RUN_PO_RECEIPT	<ul style="list-style-type: none"> Data Exchanges, Barcode Labels, PO Receipt Label, PO Receipt Labels Purchasing, Shipments, Reports, Receipt Labels, PO Receipt Labels Purchasing, Shipments, Process Receipts 	If you have PeopleSoft Purchasing installed, select the process request parameters for purchasing receipt labels. Purchasing receipt labels are used to track items that are received by the business unit. Receiving labels can be generated for each item on a receipt.
Completion Label - Production Select	RUN_SFS7004	Data Exchanges, Barcode Labels, Completion Label, Production Select	Select the business unit for which to print labels. You can also indicate whether printed labels are based on a production ID or production schedule.
Completion Label - Completion Labels	RUN_SFS7004B	Data Exchanges, Barcode Labels, Completion Label, Completion Labels	Select the number of labels to print.
Pull Ticket/Pull List Options	RUN_FPS6500	<ul style="list-style-type: none"> Manufacturing Definitions, Kanban, Electronic Kanbans, Print Pull Ticket/Pull List, Pull Ticket/Pull List Options Data Exchanges, Barcode Labels, Pull Ticket Label, Pull Ticket/Pull List Options 	Indicate how you want to print pull tickets and pull lists.
Pull Ticket/Pull List Range	RUN_FPS6500A	<ul style="list-style-type: none"> Manufacturing Definitions, Kanban, Electronic Kanbans, Print Pull Ticket/Pull List, Pull Ticket/Pull List Range Data Exchanges, Barcode Labels, Pull Ticket Label, Pull Ticket/Pull List Range 	Make the printing selection.
Print Kanban Card	RUN_FPS6510	<ul style="list-style-type: none"> Data Exchanges, Barcode Labels, Kanban Card Label, Print Kanban Cards Manufacturing Definitions, Kanban, Kanban Cards, Print Kanban Cards 	Print Kanban Card labels.

Page Name	Object Name	Navigation	Usage
Kanban Card Range	RUN_FPS6510A	<ul style="list-style-type: none"> Data Exchanges, Barcode Labels, Kanban Card Label, Kanban Card Range Manufacturing Definitions, Kanban, Kanban Cards, Print Kanban Cards, Kanban Card Range 	Select the kanban card label range.
Storage Location Label	RUN_INS9025	Data Exchanges, Barcode Labels, Storage Location Label	Select the process request parameters for printing bar code labels for storage locations.
Item Storage Label	RUN_INS9010	Data Exchanges, Barcode Labels, Item Storage Label	Select the process request parameters for printing bar code labels for items in storage.
Storage Container Label	RUN_INS9015	Data Exchanges, Barcode Labels, Storage Container Label	Select the process request parameters for printing container labels for storage container IDs.
Shipping Carton Label	RUN_INS6025	Data Exchanges, Barcode Labels, Shipping Carton Label	Select the process request parameters for shipping carton labels. The shipping carton labels can be automatically printed during picking.
Shipping Serial Label	RUN_INS6035	Data Exchanges, Barcode Labels, Shipping Serial Label	Select the process request parameters for shipping serial labels. If you assign a shipping serial label ID at shipping time, you can track items after they have been shipped.
Shipping Container Label	RUN_INS6030	Data Exchanges, Barcode Labels, Shipping Container Label	Select the process request parameters for shipping container labels.
Item Usage Label page	RUN_INS6040	Data Exchanges, Barcode Labels, Item Usage Label	Select the process request parameters for item usage labels.

Printing Purchasing Receipt Labels

Access the Purchasing Receipt Labels page.

To print all receiving labels staged by the user ID:

1. Select the Reprint Labels check box to reprint receiving labels.

The Business Unit, Receiver ID Number and Receiver Line Number fields will become available for entry if the Reprint Labels check box is selected.

2. Select the receiver ID number for which you want to reprint labels.
3. Enter the receiver line number for the item and quantity for which you want to reprint labels.

Process Type

SQR Report

Tables Accessed

BCT_LABEL_FS

BCT_SETUP_FS

RECV_RUN_CNTL

RECV_LABEL_TBL

SET_CNTRL_REC

SET_CNTRL_TREE

RECV_LN

RECV_LN_ASSET

BU_ITEMS_INV

Tables Updated

RECV_LABEL_TBL

Printing Completion Labels

Access the Completion Labels page.

To print completion labels by production ID or by production schedule:

1. To print completion labels by production ID, enter the production ID.
2. To print completions labels by production schedule, enter the production area and item ID.

If the item is revision controlled, select a revision code if the revision is required on the labels.

3. Once the process request parameters are entered, click the Search button to access the Completion Labels page.

Note. If the conversion rate between the standard unit of measure (UOM) and the standard pack UOM is not set up for this item, the page produces an error message, and the system does not display the Completion Labels page.

Tables Accessed

MASTER_ITEM_TBL

INV_ITEMS

BCT_LABEL_FS

BCT_SETUP_FS

RUN_CNTL_SF

Tables Updated

RUN_CNTL_SF

Printing Pull Ticket Labels

Access the Pull Ticket/Pull List Options page.

Pull Ticket/Pull List Options		Pull Ticket/Pull List Range	
Run Control ID: ADHOC		Report Manager	Process Monitor
Language: English		Run	
Business Unit: US008			
Repl Method <input type="radio"/> Pull List <input type="radio"/> Pull Ticket <input checked="" type="radio"/> Both	WIP Replenishment Output Opt <input checked="" type="checkbox"/> Create File for Pull Tickets <input type="checkbox"/> Print Bar Code <input type="checkbox"/> Print Bar Coded Control Flags Format ID: !INVPUllTX File Directory: File Name: 		
Request Print Status Option <input checked="" type="radio"/> Not Printed <input type="radio"/> Previously Printed <input type="radio"/> Both Printed and Unprinted	Sort Option <input type="radio"/> Kanban ID <input type="checkbox"/> Break <input checked="" type="radio"/> Item ID <input type="radio"/> WIP Location <input type="radio"/> Repl Source	WIP Replenishment Source Opt <input type="radio"/> Inventory Location <input type="radio"/> Feeder Line (Prdn Area) <input checked="" type="radio"/> Both	

Pull Ticket/Pull List Options page

To print pull ticket labels:

1. Select Create File for Pull Tickets to create an extract file.

You can use this file to download pull ticket information to label generation software. If you select the Print Bar Codes check box, the system prints bar codes for bar coded fields on the pull ticket.

2. Select the Print Bar Coded Control Flags check box to print bar code control flag information.

Bar coded control flags are item attributes flags. PeopleSoft Flow Production uses serial control and lot control flags.

See Also

PeopleSoft Flow Production 8.8 PeopleBook, “Setting Up PeopleSoft Flow Production,”
Setting Up WIP Replenishment Item Attributes

PeopleSoft Flow Production 8.8 PeopleBook, “Maintaining Kanban Cards and Replenishment Requests,”
Understanding Kanban Cards and Production Replenishment Requests

Printing Kanban Card Labels

Access the Print Kanban Cards page.

Print Kanban Cards **Kanban Card Range**

Run Control ID: ADHOC Report Manager Process Monitor Run

Language: English

Business Unit: US008

WIP Repl Kanban Card Output

☐ Create File for Kanban Cards ☐ Print Bar Code ☐ Print Bar Coded Control Flags

Format ID:

File Directory:

File Name:

Request Print Status Option

☒ Not Printed

☐ Previously Printed

☐ Both Printed and Unprinted

Sort Option

☐ Kanban ID

☒ Item ID

☐ WIP Location

☐ Repl Source

WIP Replenishment Source Opt

☒ Inventory Location

☒ Feeder Line (Prdn Area)

☒ Vendor

Print Kanban Cards page

To print Kanban Card labels:

1. Select Create File for Kanban Cards to create an extract file.

You can use this file to download kanban card information to label generation software. If you select the Print Bar Code check box, the system prints bar codes for bar coded fields on the kanban card.

2. Select the Print Bar Coded Control Flags check box to print bar code control flag information.

Bar coded control flags are item attributes flags. PeopleSoft Manufacturing uses serial control and lot control flags.

3. Select a format ID for the extract file.
4. Enter the file directory and file name to which you want to save the kanban card label file extract.

See Also

PeopleSoft Flow Production 8.8 PeopleBook, “Setting Up PeopleSoft Flow Production,”
Setting Up WIP Replenishment Item Attributes

PeopleSoft Flow Production 8.8 PeopleBook, “Maintaining Kanban Cards and Replenishment Requests,”
Understanding Kanban Cards and Production Replenishment Requests

Selecting the Kanban Card Label Range

See *PeopleSoft Flow Production 8.8 PeopleBook*, “Maintaining Kanban Cards and Replenishment Requests,” Understanding Kanban Cards and Production Replenishment Requests.

Printing Storage Location Labels

Access the Storage Location Label page.

To print storage location labels:

1. Select the storage areas for which you want to print labels in the storage area fields.
If you select only the first level, the system prints labels for all the storage locations in that area down to the lowest level.
2. If you want to print labels for all the locations in your warehouse, then you would enter the area fields only to the warehouse level.
3. If you want to print labels for all the bins in an aisle, then you would enter the storage area fields down to the aisle level.

Tables Accessed

BCT_LABEL_FS

BCT_SETUP_FS

STOR_LOC_INV

Tables Updated

RUN_CNTL_IN

Printing Item Storage Labels

Access the Item Storage Label page.

To print item storage labels:

1. Select the Autogenerate Labels check box to have the system automatically generate all the item labels that you need for a storage location.
2. The Stor Loc (storage location) fields are required only if you use the Autogenerate Labels option.
Use these fields if you want to print labels for all the items in a specific storage location.
3. If you select Autogenerate Labels and enter a storage area, you can enter the unit of measure by which you want to print the labels in the Group UOM (group unit of measure) field.
For example, Location B01 has a quantity of *100 EA* (each). You select group UOM of *CS* (case). If there are 25 each per case, then the system generates four labels. If you select a group UOM of *EA* (each), then the system generates 100 labels.
4. If you select a serial-controlled item, the Group UOM field automatically appears with the standard unit of measure for the item and is unavailable for entry.
One label per serial ID is printed.
5. If you enter a storage area for a lot-controlled, serial-controlled, staged date tracked, or actual costed item, the system verifies that the item exists in the specified storage area.

Tables Accessed

BCT_LABEL_FS

BCT_SETUP_FS

BU_ITEMS_INV

INV_ITEMS

INV_STCK_UOM_VW

MASTER_ITEM_TBL

PO_RECEIVED_INV

Tables Updated

RUN_CNTL_IN

Printing Storage Container Labels

Access the Storage Container Labels page.

To print storage container labels:

1. Select a storage container prefix in the Beg Seq (beginning sequence) field.

The storage container prefixes are defined on the Automatic Numbering page.

2. Enter the number of labels that you want to print in the Nbr in Seq (number in sequence) field.

The next sequence of labels for the storage container prefix that you entered are printed. The last sequence number used for the storage container prefix that you entered is saved in the system.

Tables Accessed

BCT_LABEL_FS

BCT_SETUP_FS

AUTO_NUM_TBL

Tables Updated

AUTO_NUM_TBL

RUN_CNTL_IN

Printing Shipping Carton Labels

Access the Shipping Carton Label page.

Shipping Carton Label

Run Control ID: Shipping Report Manager Process Monitor Run

Language: English

Process Request Parameters Find | View All First 1 of 1 Last

*Request ID: SHIP Unit: US008

Pick Batch ID: 15 Pick Line: 2

Source: Src BU: Order No: Line:

Format ID

Format ID: ISHP_CRTN.LWL Copies: 1

Unit of Measure

☒ Order
☐ Standard
☐ Standard Pack

Printing Selection

☒ Pick Batch ID
☐ Order Number

Override File

☐ Override File File Directory: File Name:

Shipping Carton Label page

If the format ID is not entered, it automatically appears first from the ship to location, then from the sold to location, or then from the Label Setup page, in that order, depending on which of these values exist.

To specify a file directory and file name for the label extraction file, select the Override File check box, and enter the file directory and file name. Leave the Override File check box clear to create the extraction file in the default directory with the default file name.

To select the directory for the carton label file, use the following hierarchy:

1. The path you specify for the file directory takes precedence.
2. If you do not specify a file directory, the directory automatically appears the Pick Plan Bar Coding Options page in the Fulfillment Setup page component.
3. If no directory is specified on the Pick Plan Bar Coding Options page in the Fulfillment Setup page group, the directory name is the FILEPREFIX that was specified in SETENV.SQC during the initial system setup.

For information on setting the FILEPREFIX in the SETENV.SQC, refer to the installation documentation.

4. If no FILEPREFIX was specified during system setup, the directory name defaults to the current directory where the label program is running.

To name the file for the carton label file, use the following hierarchy:

1. The file name specified in the File Name field takes precedence.
2. If you don't specify a file name, the file name is the file prefix defined on the Pick Plan Bar Coding Options page in the Fulfillment Setup page component combined with the last five digits of the process ID and the file suffix defined on the Pick Plan Bar Coding Options page.
3. If nothing is specified on the Pick Plan Bar Coding Options page, the last five digits of the process ID are used as the file name and the file name suffix is the FILESUFFIX that you specified in SETENV.SQC when you initially set up the system.

For information on setting the FILESUFFIX in the SETENV.SQC, refer to the installation documentation.

4. If no FILESUFFIX was specified in SETENV.SQC when you initially set up the system, the last five digits of the process ID are used as the file name and no suffix is appended.

File Prefix	File Name	File Suffix
Override	Override	Override
The file prefix defined on the Pick Plan Bar Coding Options page in the Fulfillment Setup page component.	The last five digits of the process ID. If multiple requests can be entered on the label request page, then an additional two-digit sequential number starting with <i>01</i> is appended to the end of the file name.	The file suffix defined on the Pick Plan Bar Coding Options page in the Fulfillment Setup page component.
None	The last five digits of the process ID. If multiple requests can be entered on the label request page, then an additional two-digit sequential number starting with <i>01</i> is appended to the end of the file name.	The FILESUFFIX that you specified in SETENV.SQC.
None	The last five digits of the process ID. If multiple requests can be entered on the label request page, then an additional two-digit sequential number starting with <i>01</i> is appended to the end of the file name.	None.

Tables Accessed

BCT_LABEL_FS

BCT_SETUP_FS

BU_ITEMS_INV

CARRIER_ID

CUST_ADDRESS

CUST_SHIPTO_OPT

CUST_SOLDTO_OPT

DEMAND_INV

DF_SETUP_INV

DF_SETUP_IT_INV

INV_ITEM_UOM

INV_ITEMS

ISSUE_HDR_INV

LOCATION_TBL

MASTER_ITEM_TBL

ORD_LINE

SHIP_INF_INV

Tables Updated

RUN_CNTL_IN

Printing Shipping Serial Labels

Access the Shipping Serial Labels page.

Tables Accessed

AUTO_SERIAL_NUM

BCT_LABEL_FS

BCT_SETUP_FS

Tables Updated

AUTO_SERIAL_NUM

RUN_CNTL_IN

Printing Shipping Container Label

The UCC/EAN manufacturer ID is included in the extract file for the shipping container labels. The UCC/EAN manufacturer ID along with the shipping container serial ID provide a unique identifier to create a unique shipping ID for the shipping container.

Note. You cannot print shipping container labels for more than one location at a time. If the criteria that you specify include multiple ship to locations, a warning message appears requesting that you narrow the criteria until only one ship to location is included.

Tables Accessed

BCT_LABEL_FS

BCT_MFGID_SETUP

BCT_SETUP_FS

CARRIER_ID

CUST_ADDRESS

CUST_SHIPTO_OPT

CUST_SOLDTO_OPT

DEMAND_INV

ISSUE_HDR_INV

LOCATION_TBL

ORD_LINE

SHIP_INF_INV

Tables Updated

BCT_MFGID_SETUP

DEMAND_INV

SHIP_INF_INV

RUN_CNTL_IN

See Also

Chapter 9, “Designing an Electronic Data Collection System,” Setting Up the UCC/EAN Manufacturer ID, page 183

PeopleSoft Inventory 8.8 PeopleBook, “Packing Orders for Shipment,” Understanding Shipping Containers and Packing Sessions

CHAPTER 11

Understanding Record Layouts for the Electronic Data Collection System

This chapter discusses:

- Par location count and physical accounting file formats.
- Label extract file record definitions.
- Picking plan extract file record definitions.

Note. The information in this chapter is formatted so that a field-specific notes section follows each table. The field-specific notes section includes further details about the fields in the preceding table that are marked with an asterisk (*).

PeopleSoft currently does not support the creation of extract files for labels, paperless picking, par location replenishment, or physical accounting from processes on MVS servers. For these environments, the system supports the extract files by running processes using an application server.

Par Location Count and Physical Accounting File Formats

PeopleSoft Inventory provides two transactions that can be processed using batch flat files that are downloaded and uploaded using SQR programs.

The system uses batch processes to generate a flat file containing the item to be counted for either of the transactions. The flat file is passed to a third-party electronic data collection system that performs the count. The flat file must then be returned to PeopleSoft in the same format.

The files that you download to and upload from electronic data collection devices must conform to these rules:

- The file name must be eight characters or less.
An extension of .upl is automatically appended to upload file names. An extension of .dwn is automatically appended to download file names.
- The first field must start in column one.
- There must be a single blank space between each field.
- All fields must be left-justified.
- The system expects the file that is read by the upload process to have a .upl extension.

Par Location Count

You can download par location count information for use in a hand-held bar code device.

You can select the following options to download:

- One par location at a time.
- All par locations for a par location group.
- All par locations for a specified business unit.
- All par locations.

Below is the layout of the par location download and upload file.

The download process creates a .dwn file of 404 characters per record from the par location definition tables (CART_ATTRIB_INV and CART_TEMPL_INV). The upload expects the same file layout, 404 characters per record as a .upl file. The upload process updates the par location count tables (CART_CT_INF_INV). Each par location is created with an unprocessed status, and you can view them on the Par Location Count Inquiry page.

Contents	Format
BUSINESS_UNIT	5
INV_CART_ID	15
CART_GROUP	5
CART_REPLEN_OPT *	2
SHADOW_FLAG *	1
QTY_OPTION *	2
INV_ITEM_ID	18
DESCR	30
COMPARTMENT	10
COUNT_ORDER	4
COUNT_REQUIRED *	1
SUFFICIENT_STOCK *	1

Contents	Format
CART_REPLEN_CTRL *	2
CART_COUNT_QTY *	16
DEFAULT_QTY	16
QTY_OPTIMAL	16
FOQ (Fixed Order Qty)	16
QTY_MAXIMUM	16
UNIT_OF_MEASURE	3
DISTRIB_TYPE	10
DEPTID	10
TRANSFER_COST	15
PRICE_MARKUP_PCT	15
CHARGE_CODE	20
ACCOUNT	10
ALTACCT	10
OPERATING_UNIT	8
PRODUCT	6
PROJECT_ID	15
CONS_NON_STOCK	1
BCKORDR_CNCL_FLAG	1

Contents	Format
CHANGE_MARKUP_AMT	16
CHANGE_MARKUP_PCNT	15
MATERIAL_RECON_FLG	1
USG_TRCKNG_METHOD	2
LAST_OPRID	8
LAST_DTTM_UPDATE	26

Field-Specific Notes

See the field-specific information that follows.

CART_REPLEN_OPT

Specifies the way in which an item is to be replenished.

- 01 [Symbol_Wingdings_224] “stk” or “stock” (creates an MSR).
- 02 [Symbol_Wingdings_224] “less” or “stockless” (creates a staged purchase order).
- 03 [Symbol_Wingdings_224] “nons” or “non-stock” (creates a requisition).
- 04 [Symbol_Wingdings_224] “not replenished” (item is not to be replenished).

Note. The system uses stockless and non-stock replenishment options only if PeopleSoft Purchasing is installed.

SHADOW_FLAG

The shadow par location flag, which has an on-line label of *not replenished*, appears on the hand-held bar code device. This informs the user that this par location is not to be replenished.

QTY_OPTION

A hand-held bar code device can modify this field.

The quantity options for each par location count appears by default based on the default quantity option that you defined on the Par Location Group Definition page.

If the default quantity option is count, the system prompts the user to enter the quantity on hand on the par location. If the default quantity is request, the system prompts the user to enter the requested quantity.

Values are:

- 01 [Symbol_Wingdings_224] “c” or “count qty.”

02 [Symbol_Wingdings_224] “r” or “request qty.”

COUNT_REQUIRED

The COUNT_REQUIRED flag is evaluated to determine whether a count must be entered for an item. This flag is defined per item on the Par Location Group Definition page.

SUFFICIENT_STOCK

A hand-held bar code device can modify this field.

The SUFFICIENT_STOCK flag is available for entry on the hand-held bar code device if the quantity option is *count qty*. PeopleSoft provides this field, so that the user does not need to enter a count for that item if it is not necessary.

CART_REPLEN_CTRL

Identifies how the order quantity is to be calculated if the quantity option is set to count quantity.

01 [Symbol_Wingdings_224] “Par”

02 [Symbol_Wingdings_224] “FOQ” or “Fixed Order Qty”

03 [Symbol_Wingdings_224] “Min/Max”

CART_COUNT_QTY

A hand-held bar code device can modify this field.

The quantity options for each par location count appears by default based on the default quantity option that you defined on the Par Location Group Definition page.

If the default quantity option is count, the system prompts the user to enter the quantity on hand on the par location. If the default quantity is request, the system prompts the user to enter the requested quantity.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Managing Par Inventory”

Physical Accounting

You can use a hand-held bar code device to conduct your physical counting event. To ensure data transfer accuracy, first configure the download and upload file formats for the counting sheet according to the layout presented in the next table. All fields must be left-justified, with a space between each field.

Field	Comments	Format
INV_ITEM_ID	Required.	Char 18
STORAGE_AREA	Required.	Char 5
STOR_LEVEL_1	Required, if set up for the storage area.	Char 4

Field	Comments	Format
STOR_LEVEL_2	Required, if set up for the storage area.	Char 4
STOR_LEVEL_3	Required, if set up for the storage area.	Char 4
STOR_LEVEL_4	Required, if set up for the storage area.	Char 4
UNIT_OF_MEASURE	Required. Must contain the stocking unit of measure (UOM) at the location.	Char 3
STAGED_DATE	Required. If the item is staged-date controlled, this field must contain the appropriate staged date. If the item is not staged-date controlled, include the filler default value that you established on the Installation Options - Inventory page in the Installation Options component.	MMDDYYYY
SERIAL_ID	Required. If the item is serial-controlled, this field must contain the appropriate serial ID. If the item is not serial-controlled, include the filler default value that you established on the Installation Options - Inventory page in the Installation Options component.	Char 20
INV_LOT_ID	Required. If the item is lot-controlled, this field must contain the appropriate lot ID. If the item is not lot-controlled, include the filler default value that you established on the Installation Options - Inventory page in the Installation Options component.	Char 15
CONTAINER_ID	Optional.	Char 10
QTY	Required. Must contain a quantity; zero is valid.	Nbr 16

Field	Comments	Format
UNIT_OF_MEASURE_COUNT	Required. Must contain a valid UOM for the item. If this UOM is different than the stocking UOM noted above, then the quantity is converted to the stocking UOM before updating the database.	Char 3
ITEM_DESCR	Optional. For informational purposes only.	Char 30
COUNT_DTTM	Must contain a date. If the field is blank then the system does not update the row.	MM/DD/YYYY HH:MI:SS

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Performing Physical Accounting”

Label Extract File Record Definitions

The label extract file record definitions define the format for each label extract file. The label extract file is the output that the PeopleSoft application sends to the label printing software that you use to print the bar-coded labels.

The label extract files contain many field values that you can use in your label print process.

The label extract files are in comma-delimited format.

Each label extract file that contains an item ID also includes control flags that identify characteristics of that item. The control flags can be concatenated to various key fields that are printed as bar codes. For example, suppose that you concatenate the control flags to the item ID on the item storage labels, your electronic data collection system knows what other keys for which to prompt.

Here are the five control flags:

Lot Control Flag	Set to <i>Y</i> if the item is lot-controlled. Set to <i>N</i> if the item is not lot-controlled.
Serial Control Flag	Set to <i>Y</i> if the item is serial-controlled. Set to <i>N</i> if the item is not serial-controlled.
Staged Date Control Flag	Set to <i>Y</i> if the item is staged-date controlled. Set to <i>N</i> if the item is not staged-date controlled.
Actual Cost Control Flag	Set to <i>Y</i> if the item is actual-costed. Set to <i>N</i> if the item is not actual-costed.

Shipping Serial Control Flag Set to *Y* if the item is shipping serial-controlled. Set to *N* if the item is not shipping serial-controlled. The shipping serial control flag is only included on the shipping carton and shipping container transactions.

Note. The Format ID is an optional field on all of the label extract file records. It is in the first position only if the Include Format check box is selected for the specified format ID.

See Also

Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” Setting Up Electronic Data Collection Defaults, page 35

Item Usage Label

The label extract file record definitions define the format for the label extract file.

Storage Location Label Field Name	Format
Label Format ID	Char 30
Business Unit	Char 10
Location Code/Par Location Code	Char 15
Location Description/Par Location Description	Char 30
Item ID	Char 40
Item Description	Char 30
Unit of Measure	Char 3
Quantity	Nbr 11.4
Standard Unit of Measure	Char 3

Item Storage Label

The label extract file record definitions define the format for the label extract file.

Item Storage Label Field Name	Format	Desc./Com.
Label Format ID	Char 30	N/A
Business Unit	Char 10	N/A
Item Id	Char 40	N/A
Item Description	Char 30	N/A
Lot Control Flag	Char 1	N/A
Lot Id	Char 15	N/A
Serial Control Flag	Char 1	N/A
Serial Id	Char 35	N/A
Staged Date Flag	Char 1	N/A
Staged Date	Date 10	N/A
Actual Cost Flag	Char 1	This field is set to Y if the item is actual-costed.
Unit of Measure	Char 3	N/A
Quantity	Nbr 11.4	N/A
Standard Unit of Measure	Char 3	N/A
Standard Quantity	Nbr 11.4	N/A
Reference Number	Char 30	N/A

Storage Container Label

The label extract file record definitions define the format for the label extract file.

Storage Container Label Field Name	Format
Label Format Id	Char 30
Container Number	Nbr 18

Storage Location Label

The label extract file record definitions define the format for the label extract file.

Storage Location Label Field Name	Format
Label Format ID	Char 30
Business Unit	Char 10
Storage Location	Char 5
Storage Level 1	Char 4
Storage Level 2	Char 4
Storage Level 3	Char 4
Storage Level 4	Char 4

Shipping Carton Label

The label extract file record definitions define the format for the label extract file.

Shipping Carton Label Field Name	Format	Desc./Com.
Label Format ID	Char 30	N/A
Ship From Location	Char 30	N/A
Ship From Address1	Char 55	N/A
Ship From Address2	Char 55	N/A

Shipping Carton Label Field Name	Format	Desc./Com.
Ship From Address3	Char 55	N/A
Ship From Address4	Char 55	N/A
Ship From Num1	Char 6	N/A
Ship From Num2	Char 4	N/A
Ship From House Type	Char 2	N/A
Ship From City	Char 30	N/A
Ship From Country	Char 30	N/A
Ship From Addr field1	Char 2	N/A
Ship From Addr field2	Char 4	N/A
Ship From Addr field3	Char 4	N/A
Ship From Geo Code	Char 11	N/A
Ship From In City Limit	Char 1	N/A
Ship From State	Char 4	N/A
Ship From Postal	Char 12	N/A
Ship From Country	Char 3	N/A
Customer Name	Char 40	N/A
Customer Name1	Char 40	N/A
Customer Name2	Char 40	N/A
Address1	Char 55	N/A

Shipping Carton Label Field Name	Format	Desc./Com.
Address2	Char 55	N/A
Address3	Char 55	N/A
Address4	Char 55	N/A
Num1	Char 6	N/A
Num2	Char 4	N/A
House Type	Char 2	N/A
City	Char 30	N/A
County	Char 30	N/A
State	Char 4	N/A
Postal	Char 12	N/A
Country	Char 3	N/A
Addr field1	Char 2	N/A
Addr field2	Char 4	N/A
Addr field3	Char 4	N/A
Geo Code	Char 11	N/A
In City Limit	Char 1	N/A
Carrier	Char 30	N/A
Ship To Customer ID/or Location	Char 15	This field contains either the ship to customer ID or the location, depending on the field that you used when you created the order.

Shipping Carton Label Field Name	Format	Desc./Com.
Route Code	Char 6	N/A
Route Stop Number	Number 5	N/A
Customer PO	Char 25	N/A
Customer PO Line	Char 11	N/A
Customer Contract Number	Char 25	N/A
Customer Contract Line Number	Char 3	N/A
Customer Item Number	Char 40	N/A
Business Unit	Char 10	N/A
Demand Source	Char 2	N/A
Source Business Unit	Char 5	N/A
Order Number	Char 10	N/A
Order Line Number	Nbr 5	N/A
Schedule Line Number	Nbr 7	N/A
Inventory Item ID	Char 40	N/A
Demand Line Number	Nbr 4	N/A
Product ID	Char 40	N/A
Parent Product ID	Char 40	N/A
Lot Control Flag	Char 1	N/A
Standard Serial Control Flag	Char 1	N/A

Shipping Carton Label Field Name	Format	Desc./Com.
Staged Date Control Flag	Char 1	N/A
Actual Cost Flag	Char 1	This field is set to Y if the item is actual-costed.
Ship Serial Control Flag	Char 1	N/A
Pick Batch ID	Nbr 10	N/A
Pick Batch Line Number	Nbr 5	N/A
Carton Qty in Ordering UOM	Nbr 11.4	N/A
Ordering UOM	Char 3	N/A
Carton Qty in Standard UOM	Nbr 11.4	N/A
Standard UOM	Char 3	N/A
Carton Qty in Standard Pack UOM	Nbr 11.4	N/A
Standard Pack UOM	Char 3	N/A
Carton Sequence	Char 10	N/A

Shipping Container Label

The label extract file record definitions define the format for the label extract file.

Shipping Container Label Field Name	Format	Desc./Com.
Label Format ID	Char 30	N/A
Ship From Location	Char 30	N/A
Ship From Address1	Char 55	N/A

Shipping Container Label Field Name	Format	Desc./Com.
Ship From Address2	Char 55	N/A
Ship From Address3	Char 55	N/A
Ship From Address4	Char 55	N/A
Ship From Num1	Char 6	N/A
Ship From Num2	Char 4	N/A
Ship From House Type	Char 2	N/A
Ship From City	Char 30	N/A
Ship From County	Char 30	N/A
Ship From State	Char 4	N/A
Ship From Postal	Char 12	N/A
Ship From Country	Char 3	N/A
Ship From Addr field1	Char 2	N/A
Ship From Addr field2	Char 4	N/A
Ship From Addr field3	Char 4	N/A
Ship From Geo Code	Char 11	N/A
Ship From In City Limit	Char 1	N/A
Customer Name	Char 40	N/A
Customer Name1	Char 40	N/A
Customer Name2	Char 40	N/A

Shipping Container Label Field Name	Format	Desc./Com.
Address1	Char 55	N/A
Address2	Char 55	N/A
Address3	Char 55	N/A
Address4	Char 55	N/A
Num1	Char 6	N/A
Num2	Char 4	N/A
House Type	Char 2	N/A
City	Char 30	N/A
County	Char 30	N/A
State	Char 4	N/A
Postal	Char 12	N/A
Country	Char 3	N/A
Carrier	Char 30	N/A
Ship To Customer ID or Location	Char 15	This field contains either the ship to customer ID or the location, depending on the field that you used when you created the order.
Manufacturer ID Number	Char 7	N/A
Shipping Container Serial Number	Nbr 9	N/A
Carton Sequence	Char 10	N/A
Business Unit	Char 10	N/A

Shipping Serial Number Label

The label extract file record definitions define the format for the label extract file.

Serial Number Label Field Name	Format
Label Format ID	Char 30
Serial ID	Nbr 35

Production Completion Label

The label extract file record definitions define the format for the label extract file.

Production Completion Label Field Name	Format	Desc./Com.
Label Format ID	Char 30	N/A
Business Unit	Char 10	See note below.
Production ID	Char 10	N/A
Production Area	Char 10	N/A
Item ID	Char 40	See note below.
Item Description 30	Char 30	N/A
Configuration Code	Char 50	N/A
Revision	Char 4	N/A
Production Type	Char 2	N/A
Lot Control Flag	Char 1	N/A
Serial Control Flag	Char 1	N/A
Staged Date Flag	Char 1	N/A
Actual Cost Flag	Char 1	N/A

Production Completion Label Field Name	Format	Desc./Com.
Lot ID	Char 15	N/A
Standard Unit of Measure	Char 3	N/A
Standard Pack Quantity	Nbr 11.4	N/A
Std Pack Unit of Measure	Char 3	N/A
Quantity in Std Pack UOM	Nbr 11.4	N/A
Date	Date	CCYYMMDD
Op Sequence	Number 4.0	N/A
Output Type	Char 2	N/A

Note. Certain fields allow for possible larger sizes to accommodate customer revisions. In general, field sizes should match that within the PeopleSoft COBOL programs. On-line pages use the sizes as defined within PeopleSoft Application Designer. A size mismatch between the file and the definition may result in an error when data is retrieved through the flat file.

Purchasing Receipt Label

The label extract file record definitions define the format for the label extract file.

Receiving Label Field Name	Format
Label Format ID	Char 30
Inventory Business Unit	Char 10
Item ID	Char 40
Item Description	Char 30
Lot Control Flag	Char 1
Lot ID	Char 15

Receiving Label Field Name	Format
Serial Control Flag	Char 1
Serial ID	Char 35
Receipt Date	Date 10
Actual Cost Flag	Char 1
Receiving Business Unit	Char 5
Receiver ID	Char 10
Receiver Line Number	Nbr 5
Unit of Measure	Char 3
Quantity	Nbr 11.4
Standard Unit of Measure	Char 3
Standard Quantity	Nbr 11.4
Production ID	Char 10
Production Sequence Number	Nbr 2
Staged Date Flag	Char 1

Kanban Card and Pull Ticket Label

The label extract file record definitions define the format for the label extract file.

Kanban Field Name	Type
Label Format ID	Char 30
Business Unit	Char 10

Kanban Field Name	Type
Report Type • 2 = Pull Ticket • 3 = Kanban Card	Char 1
Replenishment Source • 1 = Inventory • 2 = Vendor • 3 = Feeder Line	Char 1
Kanban ID	Char 15
Item ID	Char 40
Item Description	Char 30
WIP Storage Area	Char 5
WIP StorageLevel 1	Char 4
WIP StorageLevel 2	Char 4
WIP StorageLevel 3	Char 4
WIP StorageLevel 4	Char 4
Source Storage Area Blank if Replenishment Source <> INV	Char 5
Source StorageLevel 1 Blank if Repl Source <> INV	Char 4
Source StorageLevel 2 Blank if Repl Source <> INV	Char 4
Source StorageLevel 3 Blank if Repl Source <> INV	Char 4

Kanban Field Name	Type
Source StorageLevel 4 Blank if Repl Source <> INV	Char 4
Production Area Blank if Repl Source <> Feeder	Char 10
Vendor ID Blank if Repl Source <> Vendor	Char 10
Vendor Name Blank if Repl Source <> Vendor	Char 40
Vendor Location Blank if Repl Source <> Vendor	Char 10
Vendor Location Descr Blank if Repl Source <> Vendor	Char 30
Vendor Item ID Blank if Repl Source <> Vendor	Char 20
Vendor Qty Blank if Repl Source <> Vendor	Number 11.4
Vendor UOM Blank if Repl Source <> Vendor	Char 3
Qty Standard UOM	Number 11.4
Standard UOM	Char 3
Lot Control Flag	Char 1
Serial Control Flag	Char 1

Kanban Field Name	Type
Print Count	Number 3
DateTime Stamp	Datetime 14

Picking Plan Extract File Record Definitions

The system generates this optional extract file at the same time that it initiates the picking plan. Its content mimics the data contained within the printed picking plan document and provides an electronic means for the front-end (hand-held or batch) process to validate and enhance data collection. Data in the file is comma-separated.

The picking plan extract file includes five control flags that identify characteristics of the item or component being picked:

Lot Control Flag	Set to <i>Y</i> if the item is lot-controlled. Set to <i>N</i> if the item is not lot-controlled.
Serial Control Flag	Set to <i>Y</i> if the item is serial-controlled. Set to <i>N</i> if the item is not serial-controlled.
Staged Date Control Flag	Set to <i>Y</i> if the item is staged-date controlled. Set to <i>N</i> if the item is not staged-date controlled.
Actual Cost Control Flag	Set to <i>Y</i> if the item is actual-costed. Set to <i>N</i> if the item is not actual-costed.
Shipping Serial Control Flag	Set to <i>Y</i> if the item is shipping serial-controlled. Set to <i>N</i> if the item is not shipping serial-controlled. The shipping serial control flag is only included in the Inventory picking extract file.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Picking Inventory,” Creating Picking Plans

Inventory Picking Extract File Format

The system generates the inventory picking extract file at the same time that it initiates the pick plan.

Picking Plan Extract File Field Name	Format
Business Unit*	Char 10
Extract Source Flag*	Char 1
Pick Batch ID	Nbr 10

Picking Plan Extract File Field Name	Format
Pick List Line Number	Nbr 5
Sequence Number	Nbr 2
Pick Mode Flag*	Char 1
Customer ID	Char 15
Ship To Customer ID	Char 15
Location	Char 10
Demand Source	Char 2
Source Business Unit	Char 5
Order Number	Char 10
Order Int Line Number	Nbr 5
Schedule Line Number	Nbr 4.2
Parent Product ID	Char 18
Item ID*	Char 40
Item Description 30	Char 30
Item Configuration Code	Char 50
Container ID	Char 10
Storage Area	Char 5
Storage Level 1	Char 4
Storage Level 2	Char 4

Picking Plan Extract File Field Name	Format
Storage Level 3	Char 4
Storage Level 4	Char 4
Order/Pick Quantity in Standard UOM	Nbr 11.4
Order/Pick Quantity in Order/Pick UOM	Nbr 11.4
Reserved Quantity in Standard UOM	Nbr 11.4
Reserved Quantity in Location UOM	Nbr 11.4
Available Quantity in Standard UOM	Nbr 11.4
Available Quantity in Location UOM	Nbr 11.4
Standard UOM	Char 3
Order/Pick UOM	Char 3
Location UOM	Char 3
Order UOM Conversion Rate	Nbr 7.8
Location UOM Conversion Rate	Nbr 7.8
Lot ID	Char 15
Serial ID	Char 35
Staged Date*	Char 8
Lot Control Flag	Char 1
Serial Control Flag	Char 1
Staged Date Control Flag	Char 1

Picking Plan Extract File Field Name	Format
Ship Serial Control Flag	Char 1
Hard Allocation Flag	Char 1
Partial Quantity Flag	Char 1
Hard Allocation Flag	Char 1
Partial Quantity Flag	Char 1
Substitute Flag	Char 1
Qty Precision for Std UOM	Char 1
Rounding Rule for Std UOM	Char 1
Qty Precision for Loc UOM	Char 1
Rounding Rule for Loc UOM	Char 1
Allow Overpick Flag	Char 1
Maximum Picking Tolerance	Nbr 3.2
Load ID	Char 10
Carrier ID	Char 10
Ship Via	Char 10
Route Code	Char 6
Route Stop Number	Nbr 5
Lot Availability Date CCYYMMDD	Char 8
Lot Retest Date CCYYMMDD	Char 8

Picking Plan Extract File Field Name	Format
Lot Expiration Date CCYYMMDD	Char 8
Scheduled Ship Date CCYYMMDD	Char 8
ASRS ID	Nbr 15
Picking Zone	Char 6
Original Item ID	Char 40
Original or Reprint Flag *	Char 1
Date / Time Stamp*	Char 14

Field-Specific Notes

See the field-specific information that follows.

Business Unit

The Business Unit field permits possible larger sizes to accommodate customer revisions. In general, field sizes should match that within the PeopleSoft COBOL programs. On-line pages use the sizes as defined within PeopleSoft Application Designer.

Extract Source Flag

0 = Inventory Pick Plan

1 = Manufacturing Pick Plan

Pick Mode Flag

0 = Push

1 = Pull

Item ID

The Item ID field permits possible larger sizes to accommodate customer revisions. In general, field sizes should match that within the PeopleSoft COBOL programs. On-line pages use the sizes defined within PeopleSoft Data Designer.

Staged Date

The format is CCYYMMDD.

Original or Reprint Flag

0 = Original

1 = Reprint

Date / Time Stamp

The format is CCYYMMDDHHMMSS.

Manufacturing Picking Extract File Format

The system generates the manufacturing extract file at the same time that the system initiates the pick plan.

Note. For manufacturing extract data, the control flags reflect the requirements for the component ID, not the item ID.

Picking Plan Extract File Field Name	Format
Business Unit*	Char 10
Extract Source Flag*	Char 1
Pick Batch ID	Nbr 10
Pick List Line Number	Nbr 5
Sequence Number	Nbr 2
Pick Mode Flag*	Char 1
Production Area	Char 10
Production ID	Char 10
Production Type*	Char 2
Issue Method*	Char 4
Item ID*	Char 40
Item Description 30	Char 30
Item Configuration Code	Char 50

Picking Plan Extract File Field Name	Format
Original Component ID	Char 40
Component ID	Char 40
Component Description 30	Char 30
Component Configuration Code	Char 50
Operation Sequence	Nbr 4
Quantity Code*	Char 3
Required Date*	Char 8
Required Time*	Char 6
Work Center Code	Char 10
Work Center Description	Char 30
To Container ID	Char 10
To Storage Area	Char 5
To Storage Level 1	Char 4
To Storage Level 2	Char 4
To Storage Level 3	Char 4
To Storage Level 4	Char 4
Container ID	Char 10
Storage Area	Char 5
Storage Level 1	Char 4

Picking Plan Extract File Field Name	Format
Storage Level 2	Char 4
Storage Level 3	Char 4
Storage Level 4	Char 4
ASRS ID	Nbr 15
Order/Pick Quantity in Standard UOM	Nbr 11.4
Order/Pick Quantity in Order/Pick UOM	Nbr 11.4
Reserved Quantity in Standard UOM	Nbr 11.4
Reserved Quantity in Location UOM	Nbr 11.4
Available Quantity in Standard UOM	Nbr 11.4
Available Quantity in Location UOM	Nbr 11.4
Standard UOM	Char 3
Order/Pick UOM	Char 3
Location UOM	Char 3
Order/Pick UOM Conversion Rate	Nbr 7.8
Location UOM Conversion Rate	Nbr 7.8
Lot ID	Char 15
Lot Expiration Date	Char 8
Lot Availability Date	Char 8
Serial ID	Char 35

Picking Plan Extract File Field Name	Format
Lot Control Flag	Char 1
Serial Control Flag	Char 1
Staged Date Control Flag	Char 1
Actual Cost Control Flag	Char 1
Maintain Production ID Flag	Char 1
Non Own Flag	Char 1
Original or Reprint Flag*	Char 1
Substitute Flag	Char 1
Date / Time Stamp*	Char 14

Field-Specific Notes

See the field-specific-information that follows.

Business Unit

The Business Unit field permits possible larger sizes to accommodate customer revisions. In general, field sizes should match that within the PeopleSoft COBOL programs. On-line pages use the sizes defined within PeopleSoft Data Designer.

Extract Source Flag

0 = Inventory Pick Plan

1 = Manufacturing Pick Plan

Pick Mode Flag

0 = Push

1 = Pull

Production Type

PR = Production

RW = Rework

TD = Teardown

Issue Method

ISS = Issue

REPL = Replenish

KIT = Kit

Item ID

This field permits possible larger sizes to accommodate customer revisions. In general, field sizes should match that within the PeopleSoft COBOL programs. On-line pages use the sizes defined within PeopleSoft Data Designer.

Quantity Code

ORD = per Order

ASY = per Assembly

Required Date

The format is CCYYMMDD.

Required Time

The format is HHMMSS.

Original or Reprint Flag

A reprinted extract reflects the current data values in the database. If any pick transactions have been applied between the original and reprinted extract, the data content may differ.

0 = Original

1 = Reprint

Date / Time Stamp

The format is CCYYMMDDHHMMSS.

PART 7

Integrating with Transportation Management Systems

Chapter 12

Integrating with Transportation Management Systems

CHAPTER 12

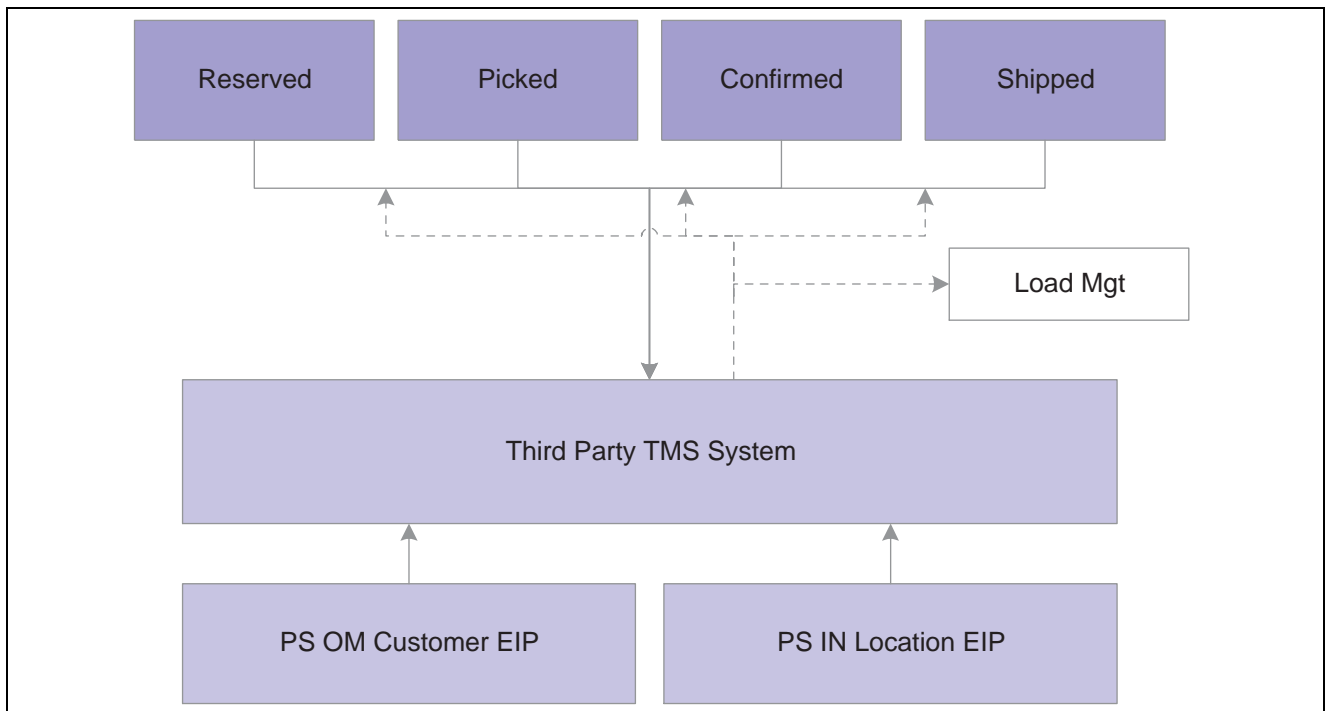
Integrating with Transportation Management Systems

This chapter provides an overview of transportation management system (TMS) enterprise integration points (EIP's) and discusses:

- Setting up PeopleSoft system for TMS integration.
- Publishing the order release EIP.
- Understanding TMS processing.
- Publishing the load notification EIP.

Understanding the Transportation Management System Integration with PeopleSoft Inventory

This diagram shows the process flow of the integration between PeopleSoft Inventory's demand fulfillment cycle and a third party TMS system:



TMS Download process

To support implementations in which a third-party system is used to allow shippers and carriers to maximize space utilization of existing loads, and thereby minimizing shipping costs, PeopleSoft provides two EIPs. These EIPs consist of:

- Transportation Management System Order Release—an asynchronous batch publish EIP that releases orders to a TMS using the TMS_ORDER_RELEASE message.
- Transportation Management System Load Notification—a synchronous and asynchronous batch subscribe EIP that loads TMS notifications using the TMS_LOAD_NOTIFICATION message.

A TMS is used to optimize the grouping of orders into shipments for distribution out of a warehouse. Order information is sent to the TMS and load optimization is performed on the orders to be shipped. The TMS determines the load ID for each of the demand lines. The demand lines are returned to the PeopleSoft fulfillment tables with a load ID.

Shipment Definition

As it relates to PeopleSoft Inventory and TMS, a shipment is a unit of work that can be thought of as the product to be delivered to a customer, at a specific location, on a specific date, by a specific method of delivery. At most, it is represented by an order in the PeopleSoft system

Within the order, many factors would determine whether the order is comprised of more than one shipment. For example, the difference in primary fields such as: multiple delivery locations and schedule dates, or specifying different carriers for different demand lines are values that would cause the order to be treated as multiple shipments.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Order Fulfillment Processing,” Understanding Enterprise Integration Points for Fulfillment Transactions

PeopleSoft Inventory 8.8 PeopleBook, “Setting Up Fulfillment Operations for the Business Unit,” Defining Transportation Management Interface Options

PeopleSoft Inventory 8.8 PeopleBook, “Picking Inventory,” Creating Picking Plan Instructions

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,” Setting Up Freight Carriers

Setting Up PeopleSoft for TMS Integration

This section discusses how to set up PeopleSoft for TMS integration.

Pages Used to Set Up PeopleSoft for TMS Integration

Page Name	Object Name	Navigation	Usage
Carrier	CARRIER_TBL	Set Up Financials/Supply Chain, Common Definitions, Shipping and Receiving, Carrier Table	Indicate if order lines that have a specific carrier should or should not be downloaded to the TMS system.
Auto Numbering	AUTO_NUM_PNL	Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering	To set up the TMS Reference ID numbering scheme, use the Auto Numbering component.
Transportation Interface	OF_SETUP7_INV	Inventory, Fulfill Stock Orders, Fulfillment Rules, Setup Fulfillment	Determine the structure of the TMS message.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Defining Financials and Supply Chain Management Common Definitions,” Setting Up Freight Carriers

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,” Setting Up Automatic Numbering

PeopleSoft Inventory 8.8 PeopleBook, “Setting Up Fulfillment Operations for the Business Unit,” Defining Transportation Management Interface Options

Setting up the TMS Integration

Before you can perform the PeopleSoft Inventory to TMS integration, you must:

- Activate the TMS_LOAD_NOTIFICATION and TMS_ORDER_RELEASE application messages.
- Define a message node.
- Configure the message channel associated with the message.
- Set up chunking rules for the TMS Order Release message.
- Activate the associated batch publish rule for the TMS Order Release application message.
- Set up the carrier table for carriers that should not be sent to the TMS.
- Set up auto numbering for the TMS Reference ID.
- Set up transportation interface options on the Setup Fulfillment page.

Some setup considerations are:

- The lead time needed to send messages to the TMS, processing on the TMS, and sending messages back to PeopleSoft Inventory.
- Your typical volume of change orders:

- If you don't have a lot of change orders, you can download demand lines from PeopleSoft to the TMS sooner in the demand fulfillment process. You do not have to create resend, remove, or cancel transactions from change orders.
- If you do have a lot of change orders, you may want to download demand lines from PeopleSoft to the TMS later in the demand fulfillment process. This way you can avoid having to create resend, remove, or cancel transactions from changed orders.
- Handling orders that have a carrier assigned prior to downloading to the TMS. As PeopleSoft Order Management allows you to define carrier defaults at a customer and order level, the demand line may have a carrier assigned prior to downloading to the TMS. If you want the TMS to determine the carrier, you will have to decide whether the TMS will ignore the carrier default and assign a new one, or use the carrier default assigned by PeopleSoft applications.
- Handling updates to the customer, location, UOM, and item weight and volume tables.
- Setting up messages.

See Also

PeopleSoft Enterprise Components, “Activating Messaging EIPs”

Publishing the Order Release EIP

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

- Send TMS messages from PeopleSoft Inventory to the TMS.
- Communicate order changes to the TMS.

Understanding the Order Release Process

Demand lines are eligible for the initial download to the TMS:

- If they have been reserved but not shipped.
- If they do not have a TMS External Reference ID assigned to them.
- If they do not have a route number assigned to them.

Demand lines are not eligible for selection if they have a PeopleSoft Order Management or Inventory hold assigned to them.

Demand lines on the PeopleSoft system are pulled from DEMAND_INV if reserved or picked, and from SHIP_INF_INV if confirmed. During this process, these tables are updated with the TMS External Reference ID and the TMS Reference Line Number, and the TMS process flag is set to “Y.” The TMS process flag indicates that the line has been sent to the TMS and is waiting for the load assignment. The TMS External Reference ID is used as the reference number between the PeopleSoft system and the TMS system.

Demand lines are grouped into logical shipments and the TMS utilizes this information to group shipments into a load:

- The TMS External Reference ID and Line Number.

- Demand line information that is related to the order.
- The customer or destination location address.
- Any note or comment information on the order header or line.

New rows of data are added to the TMS system

Note. The addition of new demand lines to an order with rows that have already been assigned a TMS External Reference ID and transmitted to the TMS must be handled as an initial download transaction. If an initial download is run the new line will be picked up as a line not having a TMS External Reference ID and will be assigned a TMS External Reference ID and a TMS Reference Line Number.

Pages Used to Publish the Order Release EIP

Page Name	Object Name	Navigation	Usage
Publish Outbound Message	IN_RUN_PUB_MSG	Data Exchanges, Publish Outbound Message	Select the TMS Order Release check box to activate the link.
TMS Order Release Selection Criteria	IN_RUN_TMSREL	Click the TMS Order Release check box on the Publish Outbound Message page, and click the TMS Order Release link.	Select which order lines are to be processed for this run control.

Sending TMS Messages from PeopleSoft Inventory to the TMS

Use the TMS_ORDER_RELEASE EIP to send demand data from PeopleSoft Inventory to the TMS.

Access the TMS Order Release Selection Criteria page.

TMS Order Release Selection Criteria

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

Process Request Parameters Find | View All First 1 of 1 Last

*Request ID:	<input type="text"/>	Description:	<input type="text"/>	+ -
*Business Unit:	<input type="text" value="US010"/> Q	Process Option:	<input type="text"/>	<input type="checkbox"/> Include Cancels
Select By Date:	<input type="text"/>	From:	<input type="text"/> 31	To:
Demand Source:	<input type="text"/> Q	Source Unit:	<input type="text"/> Q	Order Number:
Order Line:	<input type="text"/> Q	TMS Reference ID:	<input type="text"/> Q	Location:
Customer ID:	<input type="text"/> Q	Ship To:	<input type="text"/> Q	
Carrier ID:	<input type="text"/> Q	Ship Via:	<input type="text"/> Q	Pick Batch ID:
<input checked="" type="checkbox"/> Exclude Orders With a Pick ID		<input checked="" type="checkbox"/> Exclude Orders With a Load ID		Inquire Cancels

TMS Order Release Selection Criteria page

Process Option	<p>Select one of these options to run the IN_TMSORDREL application engine process:</p> <p><i>Initial Download:</i> Select to send order lines to the TMS for the first time.</p> <p><i>Re-send Shipment:</i> Select to send changes to order lines that were previously sent to the TMS.</p> <p><i>Remove Shipments:</i> Select to request that all rows of shipment be physically deleted from the TMS system.</p>
Include Cancels	Select this option to remove all rows of a shipment from the TMS. This option is used to remove shipments that have been canceled or unreserved in PeopleSoft Inventory or Order Management.
TMS Reference ID	Select a value if you are resending or removing a shipment. This option is used when change orders occur or if a message occurs for a specific TMS Reference ID.
Inquire Cancels	Select this link to view all orders that have been canceled or unreserved and will be downloaded to the TMS if you select the Include Cancels option.

Note. The TMS Reference ID is created from auto numbering setup on the PeopleSoft system. This ID is assigned to each order line selected during the Publish Outbound Message process.

Communicating Order Changes to the TMS

This section provides an overview of order changes and discusses:

- Using the resend outbound transaction.
- Using the remove outbound transaction.
- Using the cancel outbound transaction.

Understanding Order Changes

Demand lines can change within PeopleSoft Inventory and Order Management after they have been sent to the TMS.

The change may be to a primary field or to a secondary field.

- Examples of a primary field are:
 - The schedule date.
 - The destination location or address.
 - The carrier.
- Examples of a secondary field are:
 - The unit of measure.
 - The quantity.

If a change is made to a demand line that has been sent to the TMS, it is your responsibility to update the TMS.

There are three options to communicate demand changes to the TMS:

- Use the resend outbound transaction.
- Use the remove outbound transaction.
- Use the cancel outbound transaction.

Using the Resend Outbound Transaction

This option is used if changes are made to secondary fields, or after the remove outbound transaction process is used for changes made to primary fields.

A resend transaction provides the ability to send changes to demand lines that were previously sent to the TMS.

The TMS uses an action of *Add* for this transaction and if the TMS External Reference ID exists on the database, it deletes the associated row and adds the new row.

Using the Remove Outbound Transaction

This option is used if changes are made to primary fields, and can be followed by the resend outbound transaction.

This transaction is created at the business unit and TMS External Reference ID level.

It requests that all rows for a shipment be physically deleted from the TMS system.

The TMS upload flag and the TMS External Reference ID is removed from the demand lines for which the delete transaction is performed on the PeopleSoft system.

Using the Cancel Outbound Transaction

This option is used if an order has been canceled or unreserved in PeopleSoft Inventory or Order Management.

This transaction is created at the business unit and TMS External Reference ID level.

It requests that all rows for a shipment be physically deleted from the TMS system.

Understanding TMS Processing

In general, the TMS system is typically used to determine these values:

- The best carrier to use for the shipment.
- The best delivery method to use for the shipment.
- The ship date and the arrival date.
- The load ID.
- The stop number.

If multiple shipments are combined into a load, the stop number is used to determine the order to load the delivery container so that it may be unloaded efficiently, that is in the stop order.

The primary fields, sent from the PeopleSoft system, for each line of an order determine how many shipments the TMS will create. Within an order, if it's going to the same customer, the same location, on the same date, via the same ship method, PeopleSoft will consider this one shipment. Auto numbering setup will determine the External Reference ID, which is assigned to the shipment during the download process and used for identification purposes.

Shipment data is typically held in the TMS until one of these conditions are met:

- The TMS has enough information to create a full load.
- The delivery vehicle is full.
- The scheduled ship date is approaching.

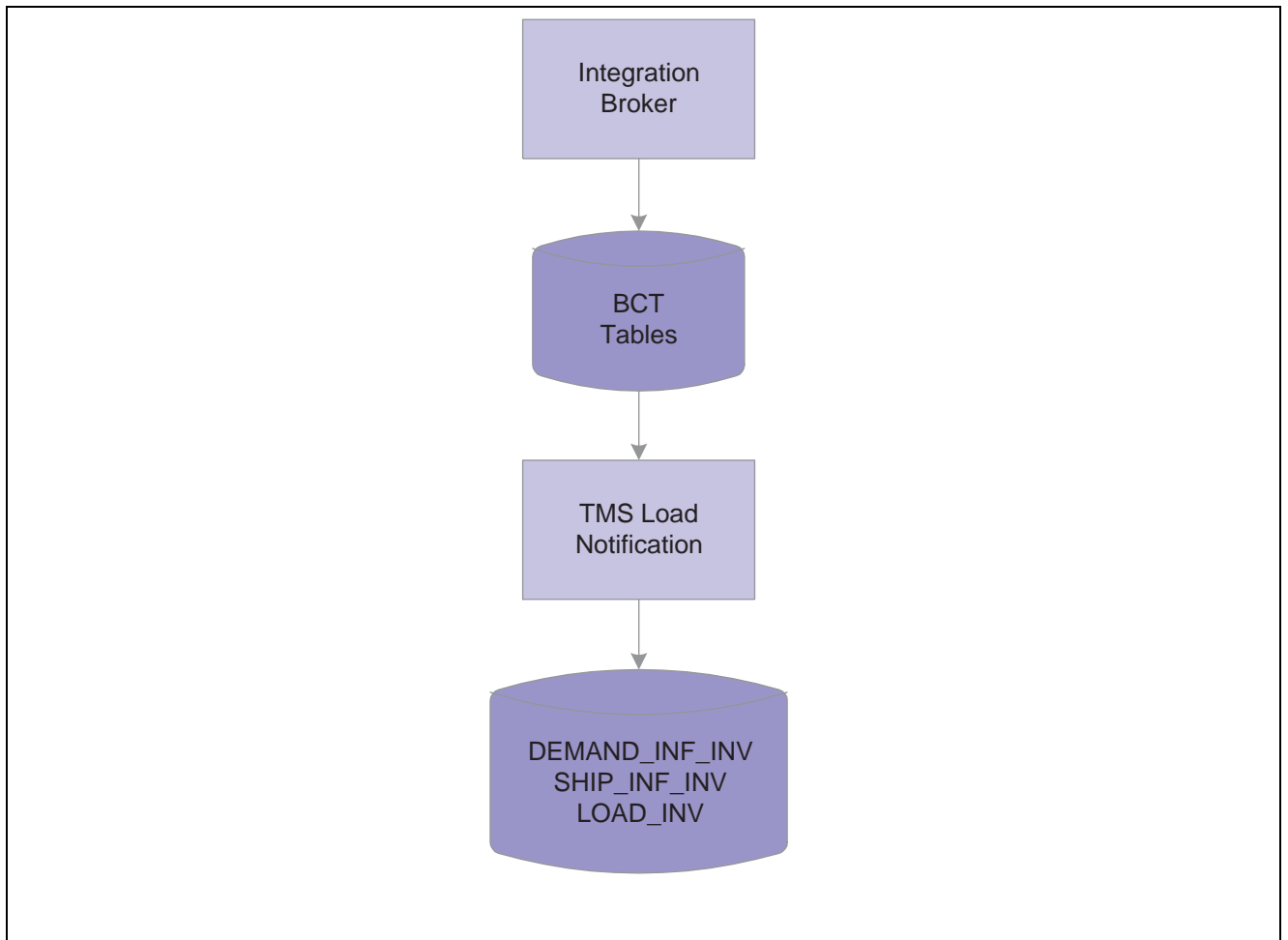
Receiving the Load Notification EIP

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

- Receiving TMS messages from the TMS to PeopleSoft Inventory.
- View and correct errors.

Understanding the Load Notification EIP Process

This diagram shows the process flow of messages from the TMS to PeopleSoft Inventory:



TMS Upload process

Pages Used to Subscribe to the Load Notification EIP

Page Name	Object Name	Navigation	Usage
TMS Load Notification	BCT_INV_TMSLOAD	Data Exchanges, Process Transactions, Inventory, TMS Load Notification	Launch the IN_TMSUPLOAD Application Engine process, which pulls the TMS message from the BCT tables and updates DEMAND_INV, SHIP_INF_INV, and LOAD_INV.
Transaction Maintenance	BCT_CTL_UPD	Data Exchanges, Transaction Error Handling, Maintain Transactions	View and change the status of error messages found during the TMS Load Notification process.
Transportation Management	BCT_TMS_UPD_INV	Click the EIP Control ID link from the Transaction Maintenance page.	View and correct error messages found during the TMS Load Notification process.

Uploading TMS messages from the TMS to PeopleSoft Inventory

Access the TMS Load Notification page.

TMS Load Notification page

The TMS_LOAD_NOTIFICATION EIP pulls TMS messages from the BCT tables and performs error checking.

Depending on where the order line is within the fulfillment process, this process will find the order line and update these values:

- The load ID.
- The load stop number.

- The shipping method.
- The carrier.
- The shipment dates.

PeopleSoft load management (LOAD_INV) is updated with the load ID, the carrier, the ship method, and the schedule date from the TMS.

The TMS Process flag is turned off and the shipment may be processed.

The load ID is an optional field during this process. For example, the TMS may determine that the order should be shipped through an outside carrier. If this occurs, the shipment may be returned to PeopleSoft with the carrier and ship via assigned, but without a load ID.

The TMS can send a delete transaction to PeopleSoft, which will remove all of the load information from demand lines and reset the TMS process flag.

All EIP_CTL_IDs Select this option to process all EIP control IDs from the BCT tables. This option will process messages that have a status of *New* or *Reprocess*.

From and To Enter the specific EIP Control ID. These fields have search buttons when the All EIP_CTL_IDs option is not selected.

Viewing and Correcting Errors

Access the Transaction Maintenance page.

Transaction Maintenance

*Unit: INV03 Transaction: Transportation Mgmt System Status: Search

Transaction Details Customize | Find | View All | First 1 of 1 Last

EIP Control ID	Trans Code	Description	*Status	Error	Date/Time	User	From
40000000000001840000000001	0390	Transportation Management Load	New	0	09/13/2003 6:07PM		Message

Transaction Maintenance page

The Transaction Maintenance page reads the BCT tables and is used to view and change the status of error messages that are found during the upload process.

Access the Transportation Management page.

Transaction Maintenance		Transportation Management	
Unit:	INV03	EIP ID:	4000000000000184000000001
Transaction:	TMS Load	Status:	New
		Source:	RP TMS
		Src Ref:	LOAD

Transaction Details			
Find View All First 1 of 2 Last			
Seq:	1	Trans Code:	0391 TMS Load
		Src Seq:	899
		Status:	Open
Load ID:	0000000003	*Action:	Add
Carrier ID:	FAST	Ship Via Code:	COMMON
Bill of Lading:	BOL10333	<input type="checkbox"/> Allow Upload After Picking	
Edit Errors Find View All First 1 of 1 Last			
Field Name:	Message:		
Date/Time:			
▶ Message Detail			

Return

Transportation Management page

The Transportation Management page provides details of the message. There can be three levels of message rows; one for the load, one for the order, and one for the line. Each row will display different fields depending on the level of the message.

See Also

Chapter 2, “Managing PeopleSoft Supply Chain Management Integration Points,” page 9

PART 8

Integrating with PeopleSoft CRM

Chapter 13

Integrating to PeopleSoft CRM

CHAPTER 13

Integrating to PeopleSoft CRM

This section provides an overview and discusses integrating PeopleSoft SCM applications to PeopleSoft CRM.

Understanding PeopleSoft SCM Integration to PeopleSoft CRM

You use EIPs to seamlessly integrate your (SCM) applications to PeopleSoft (CRM). While you can use these EIPs to integrate to other technologies, your setup steps can be different if you are integrating to PeopleSoft CRM.

Setting Up CRM EIPs

In general, you need to follow a few more steps used to set up EIPs to integrate to PeopleSoft CRM. These steps are unique to each EIP, and thus are found in the PeopleSoft SCM application documentation for each individual EIP. However, some EIPs use different messages to integrate to PeopleSoft CRM than to other systems. For example, Item Master uses the ITEM_CRM_SYNC_EFF message to integrate to PeopleSoft CRM, and ITEM_SYNC or ITEM_SYNC_EFF to integrate to other applications such as a Warehouse Management System.

Processing Inbound CRM EIPs

In general, you follow a few different steps when subscribing to CRM EIPs.

You load Inbound XML based transactions into the PeopleSoft system using subscription processes that are automatically initiated by PeopleSoft's Integration Broker functionality. Once loaded the system validates the information and if no errors are found, updates the appropriate PeopleSoft application tables. If errors are found, then the transactions may be corrected and resubmitted for processing.

Processing Outbound CRM EIPs

You can publish Outbound XML based transactions from different points in the system using PeopleSoft's messaging capabilities. If you are publishing an entire table such as items or customers, you use the one time full data publish utility. If you are publishing incremental update messages, the system automatically publishes messages with the data when you save the appropriate component.

Common Object Integrations

This section discusses integration of common objects

Syncing Customers, Contacts, and Products

You synchronize products, customers, and contacts by performing a full table publish to the PeopleSoft Order Capture system. PeopleSoft SCM provides updates to the subscribing system with incremental messages. Products should be maintained in PeopleSoft SCM and published to PeopleSoft CRM. Customers and Contacts may be maintained in both PeopleSoft SCM and CRM.

PeopleSoft Order Management Integration with PeopleSoft Order Capture

PeopleSoft Order Management and PeopleSoft Order Capture sync customer, contact, and product information. They also sync sales order data.

Submitting Quotes

PeopleSoft Order Capture submits a quote (CRM_QUOTE), which is transformed into a subscribe message (SALES_CRM_QUOTE_LOAD) to PeopleSoft Order Management. PeopleSoft Order Management sends an acknowledgement of this quote (SALES_QUOTE_NOTICE) to PeopleSoft Order Capture.

Submitting an Order

PeopleSoft Order Capture submits an order (CRM_SALES_ORDER), which is transformed into a subscribe message (SALES_CRM_ORDER_LOAD) to PeopleSoft Order Management. PeopleSoft Order Management sends a Sales Order Acknowledgement to PeopleSoft Order Capture.

Maintaining Existing Orders

PeopleSoft Order Capture sends order changes (CRM_SALES_ORDER_CHANGE) which are transformed into a subscribe message (SALES_CRM_ORDER_CHANGE_LOAD) to PeopleSoft Order Management. PeopleSoft Order Management sends an order change acknowledgement (SALES_ORDER_CHANGE_NOTICE) to PeopleSoft CRM

Checking Order Status

PeopleSoft Order Capture requests current order and order line status (CRM_ORDER_STATUS), transformed into a message (SCM_GET_ORD_STATUS) in PeopleSoft Order Management. PeopleSoft Order Management sends back the order status (SALES_ORDER_STATUS) to PeopleSoft Order Capture.

Checking Product Availability

PeopleSoft Order Capture requests product availability information (SCM_GET_PROD_AVAIL) from PeopleSoft SCM.

Shipping an Order

PeopleSoft Order Capture receives advanced shipping notices (ADVANCED_SHIPPING_NOTICE) from PeopleSoft Inventory.

See *PeopleSoft 8.8 CRM Collaborative Selling PeopleBook*

PeopleSoft Billing Integration with PeopleSoft CRM 360 Degree View

PeopleSoft CRM requests and receives invoice information from PeopleSoft Billing.

See Also

PeopleSoft 8.8 CRM Application Fundamentals PeopleBook

PeopleSoft SCM Integration with PeopleSoft FieldService

PeopleSoft FieldService requires real-time item balance and availability checks with PeopleSoft Inventory and PeopleSoft Purchasing. PeopleSoft Inventory sends information to PeopleSoft FieldService, including Inventory business units as storage locations for field service trucks and items.

See Also

PeopleSoft 8.8 CRM FieldService PeopleBook

Using CRM EIPs

You use individual EIPs to integrate SCM applications with CRM applications.

CRM EIPs

You can use the following EIPs to integrate to PeopleSoft CRM:

EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
Advanced Shipping Notice	ADVANCED_SHIPPING_NOTICE	Inventory sends PeopleSoft CRM notification that sales orders have been shipped.	Inventory	FieldService, Order Capture	<p><i>PeopleSoft 8.8 CRM FieldService PeopleBook</i></p> <p><i>PeopleSoft 8.8 CRM Collaborative Selling PeopleBook</i></p> <p>See <i>PeopleSoft Inventory 8.8 PeopleBook</i>, “Order Fulfillment Processing,” Advanced Shipping Notice (ASN) EIP.</p>
Contact	CONTACT_SYNC_EFF, CONTACT_FULLSYNC_EFF	Syncs contact information with PeopleSoft CRM.	SCM	CRM Common	<p><i>PeopleSoft CRM Application Fundamentals PeopleBook</i></p> <p>See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i>, “Maintaining Contacts”.</p>
CRM 360 Degree View	BI_EIP360_RSP	Requests billing information (bills) from PeopleSoft Billing to display in the 360-Degree View.	Billing	CRM Common	<p><i>PeopleSoft CRM Application Fundamentals PeopleBook</i></p> <p>See <i>PeopleSoft Billing 8.8 PeopleBook</i>, “Integrating with PeopleSoft CRM,” Understanding the 360-Degree View.</p>

EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
CRM 360 Degree View	BI_EIP360_Req	PeopleSoft Billing responds with the billing information requested from the PeopleSoft CRM 360-Degree View	Billing	CRM Common	<i>PeopleSoft CRM Application Fundamentals PeopleBook</i> See <i>PeopleSoft Billing 8.8 PeopleBook</i> , “Integrating with PeopleSoft CRM,” Understanding the 360-Degree View.
Customer	CUSTOMER_FULLSYNC, CUSTOMER_SYNC	Syncs customer information with PeopleSoft CRM.	SCM	CRM Common	<i>PeopleSoft CRM Application Fundamentals PeopleBook</i> See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Integrating Customer Information with Third-Party Applications.
Customer Group	CUSTOMER_GROUP_FULLSYNC, CUSTOMER_GROUP_SYNC	Syncs customer group information with PeopleSoft CRM.	SCM	CRM Common	<i>PeopleSoft CRM Application Fundamentals PeopleBook</i> See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Integrating Customer Information with Third-Party Applications.

EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
InterUnit Receipt	INTERUNIT_RECEIPT	Updates the status of interunit receipts to indicate whether the quantity on the receipt has been received.	Inventory	FieldService	<p><i>PeopleSoft 8.8 CRM FieldService PeopleBook</i></p> <p>See <i>PeopleSoft Inventory 8.8 PeopleBook</i>, “Receiving and Putting Away Stock,” Staging Interunit Transfers Using an Electronic Data Collection System.</p>
Inventory Adjustment	INVENTORY_ADJUSTMENT	Loads inventory adjustments.	Inventory	FieldService	<p><i>PeopleSoft 8.8 CRM FieldService PeopleBook</i></p> <p>See <i>PeopleSoft Inventory 8.8 PeopleBook</i>, “Making Stock Quantity Adjustments and Transfers Within the Business Unit,” Making Adjustments Using the Inventory Adjustments EIP.</p>
Inventory Item Balance	IN_ITEM_BALANCES	Queries inventory item balance.	Inventory	FieldService	<p><i>PeopleSoft 8.8 CRM FieldService PeopleBook</i></p>
Item Master	ITEM_CRM_FULLSYNC_EFF, ITEM_CRM_SYNC_EFF	Syncs item information with PeopleSoft CRM.	Inventory	FieldService	<p><i>PeopleSoft 8.8 CRM FieldService PeopleBook</i></p> <p>See <i>PeopleSoft Managing Items 8.8 PeopleBook</i>, “Loading Items,” Setting up the Item Master EIP.</p>

EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
Order Status	OM_ORDER_STATUS	Order Capture requests current order and order line status from Order Management.	Order Management	Order Capture	<i>PeopleSoft 8.8 CRM Collaborative Selling PeopleBook</i>
Product	PRODUCT_GROUP_FULLSYNC, PRODUCT_SYNC	Syncs product information with PeopleSoft CRM.	Order Management	Order Capture	<i>PeopleSoft 8.8 CRM Collaborative Selling PeopleBook</i> <i>See PeopleSoft Working with Customers and Orders 8.8 PeopleBook, "Setting Up Products," Using Product Messages.</i>

EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
Product Configurator Data Sync	CP_CONSTANT_FULLSYNC, CP_CONSTRAINT_FULLSYNC, CP_EXPRESSION_FULLSYNC, CP_GLOBAL_FULLSYNC, CP_INTRN_VAR_FULLSYNC, CP_MATRIX_FULLSYNC, CP_MESSAGED_FULLSYNC, CP_MULTOP_FULLSYNC, CP_OPTION_FULLSYNC, CP_PRINTCD_FULLSYNC, CP_RULE_FULLSYNC, CP_SECONDARY_FULLSYNC, CP_TEMPLATE_FULLSYNC, CP_TREE_FULLSYNC, CP_VALUE_LIST_FULLSYNC	Syncs configuration information with PeopleSoft CRM.	Product Configurator	Order Capture	<i>PeopleSoft 8.8 CRM Collaborative Selling PeopleBook</i> <i>See PeopleSoft Product Configurator 8.8 PeopleBook, "Synchronizing PeopleSoft Product Configuration Data".</i>
Product Availability	PSPRODAVAIL	Order Capture queries product availability from Order Management.	Inventory	Order Capture	<i>PeopleSoft 8.8 CRM Collaborative Selling PeopleBook</i>

EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
Product Group	PRODUCT_GROUP_FULLSYNC, PRODUCT_SYNC	Syncs product group information with PeopleSoft CRM.	Order Management	Order Capture	<p><i>PeopleSoft 8.8 CRM Collaborative Selling PeopleBook</i></p> <p>See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i>, “Setting Up Products,” Using Product Messages.</p>
Purchase Order and Interunit Transfer Information	RF_GETPOIUT	Queries PO and IUT Information from CRM	Inventory	FieldService	<p><i>PeopleSoft 8.8 CRM FieldService PeopleBook</i></p>
Purchase Order Receipt	PURCHASE_ORDER_RECEIPT	Updates the status of purchase order receipts to indicate whether the quantity on the receipt has been received.	Purchasing	FieldService	<p><i>PeopleSoft 8.8 CRM FieldService PeopleBook</i></p> <p>See <i>PeopleSoft Purchasing 8.8 PeopleBook</i>, “Using Messaging”.</p>
Purchase Order Requisition	PURCHASE_ORDER_REQUISITION_CRM	Loads requisition data from PeopleSoft CRM.	Purchasing	CRM Common	<p><i>PeopleSoft CRM Application Fundamentals PeopleBook</i></p> <p>See <i>PeopleSoft Purchasing 8.8 PeopleBook</i>, “Using Messaging”.</p>

EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
Sales Order	PSGETID	Order Capture calls this EIP to get the next order number from OM.	Order Management	Order Capture	<i>PeopleSoft 8.8 CRM Collaborative Selling PeopleBook</i> <i>See PeopleSoft Order Management 8.8 PeopleBook, "Using Sales Order and Quotation Messages".</i>
Sales Order Acknowledgement	SALES_ORDER_ACKNOWLEDGEMENT	Order Management publishes an acknowledgement indicating that an order has been received.	Order Management	Order Capture	<i>PeopleSoft 8.8 CRM Collaborative Selling PeopleBook</i> <i>See PeopleSoft Order Management 8.8 PeopleBook, "Using Sales Order and Quotation Messages".</i>
Sales Order Change	SALES_CRM_ORDER_CHANGE_LOAD	Order Management publishes an acknowledgement of changes made to an order that was created using the Sales Order or CRM Sales Order message.	Order Management	Order Capture	<i>PeopleSoft 8.8 CRM Collaborative Selling PeopleBook</i> <i>See PeopleSoft Order Management 8.8 PeopleBook, "Using Sales Order and Quotation Messages".</i>

EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
Sales Order Load	SALES_CRM_ORDER_LOAD, SALES_CRM_QUOTE_LOAD	Order Management loads sales order header, line and shipment information from Order Capture.	Order Management	Order Capture	<i>PeopleSoft 8.8 CRM Collaborative Selling PeopleBook</i> <i>See PeopleSoft Order Management 8.8 PeopleBook, "Using Sales Order and Quotation Messages".</i>
Sales Order Notice	SALES_ORDER_CHANGE_NOTICE	Dispatches a sales order.	Order Management	Order Capture	<i>PeopleSoft 8.8 CRM Collaborative Selling PeopleBook</i> <i>See PeopleSoft Order Management 8.8 PeopleBook, "Using Sales Order and Quotation Messages".</i>
Sales Order Status	SALES_ORDER_STATUS	Publish sales order information, including the order tracking status.	Order Management	Order Capture	<i>PeopleSoft 8.8 CRM Collaborative Selling PeopleBook</i>

EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
Sales Quote Notice	SALES_QUOTE_NOTICE	Order Management sends a quote acknowledgement to Order Capture.	Order Management	Order Capture	<p><i>PeopleSoft 8.8 CRM Collaborative Selling PeopleBook</i></p> <p>See <i>PeopleSoft Order Management 8.8 PeopleBook</i>, “Using Sales Order and Quotation Messages”.</p>
Standard Note	STD_NOTE_FULLSYNC, STD_NOTE_SYNC	Syncs standard note information with PeopleSoft CRM.	Order Management	CRM Common	<p><i>PeopleSoft CRM Application Fundamentals PeopleBook</i></p> <p>See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i>, “Maintaining Additional Customer Information,” Setting Up Standard Notes.</p>

PART 9

Integrating with Supply Chain Business Modeler

Chapter 14

Integrating with Supply Chain Business Modeler

CHAPTER 14

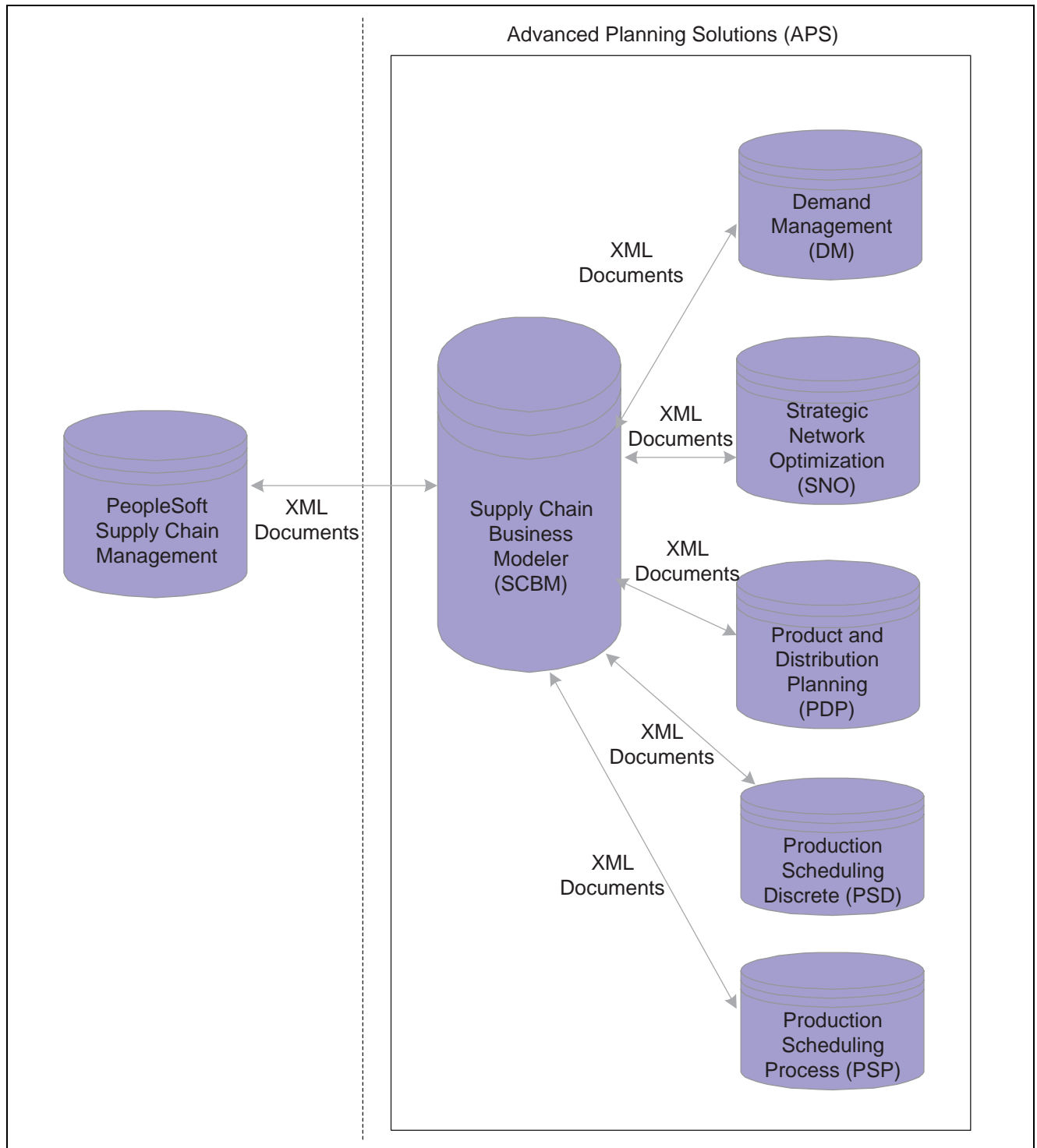
Integrating with Supply Chain Business Modeler

This chapter provides an overview of the PeopleSoft Supply Chain Management integration with the Supply Chain Business Modeler and discusses how to:

- Export data to Supply Chain Business Modeler.
- Import data from Supply Chain Business Modeler.

Understanding the PeopleSoft Supply Chain Management Integration with the Supply Chain Business Modeler

This diagram illustrates the integration between PeopleSoft Supply Chain Management and the Supply Chain Business Modeler:



PeopleSoft Supply Chain Management Integration with Supply Chain Business Modeler

PeopleSoft Supply Chain Management integrates with the Supply Chain Business Modeler (a part of Advanced Planning Solutions) by passing a wide range of supply chain data to the Supply Chain Business Modeler in the form of XML documents. The data that is passed through the XML documents is not planning model specific but rather a base representation of data that will be used by various planning models. The Supply Chain Business Modeler is a central planning data repository for the Advanced Planning Solution Products (Demand Management (DM), Strategic Network Optimization (SNO), Production and Distribution Planning (PDP), Production and Scheduling Discrete (PSD), and Production and Scheduling Process (PSP)).

Once the supply chain management data resides within the Supply Chain Business Modeler it is then used to build tactical, operational, or strategic planning models and model partitions. The model partitions are used generate data needed for specific Advanced Planning Solution products. After the Advance Planning Solution products are done with their analysis they then pass their individual information (plans) back to the Supply Chain Business Modeler.

At that point, once again PeopleSoft Supply Chain Management integrates with the Supply Chain Business Modeler by importing that planning data back into PeopleSoft Supply Chain Management and acting upon the recommendations from the planning products.

PeopleSoft Predefined XML Documents

PeopleSoft provides the following predefined XML documents for exporting data from PeopleSoft Supply Chain Management to Supply Chain Business Modeler:

XML Document	Associated Data
Configuration	Model parameters
Calendar	Calendar
Base	<ul style="list-style-type: none"> • Item • Standard UOM (unit of measure) • Item UOM (unit of measure) • Item Group • Branch • Branch Group • Storage • Storage Requirement Set • Item Storage • Item Branch • Inventory Policy
Distribution	<ul style="list-style-type: none"> • Lane • Transport Mode • Item Transport Mode
Supplier	<ul style="list-style-type: none"> • Supplier • Supplier Item

XML Document	Associated Data
Customer	Customer
Manufacturing	<ul style="list-style-type: none"> • Operation • Produced Item • Produced Item BOM (bills of material) • Consumed Item BOM (bills of material) • Operation BOR (bill of resources) • Routing • Operation Set • Branch Operation Set • Temporal Relation • Branch Operation • Branch Routing • Resource • Crew • Machine • Tool • Consumed Item Set • Resource Set
Forecasts	<ul style="list-style-type: none"> • Enterprise Forecast • Enterprise Forecast Detail
Sales Orders	<ul style="list-style-type: none"> • Sales Orders • Sales Order Details
Sales Order History	Sales Order History
Transfer Orders	<ul style="list-style-type: none"> • Transfer Order • Transfer Order Detail
Beginning Inventory	Beginning Inventory
Work Orders	<ul style="list-style-type: none"> • Work Order • Work Order Routing • Work Order Parts List
Purchase Orders	<ul style="list-style-type: none"> • Purchase Order • Purchase Order Detail
Safety Parameters	Safety Parameters
Inventory Safety Targets	Inventory Safety Targets

PeopleSoft provides the following predefined XML documents for import data from Supply Chain Business Modeler:

XML Document	Associated Data
Purchase Order	Information for the XML document is extracted from the Supply Chain Business Modeler. Data in this document is used to establish a picture of existing purchase orders sent to the Supply Chain Business Modeler. This picture of the existing orders will be used to populate original order data in the planning instance tables and also be used to identify orders that will be marked as canceled as a result of the optimized plan. Any order sent into the Supply Chain Business Modeler but not received back on a purchase order recommendation out of the Supply Chain Business Modeler will assumed to be canceled.
Transfer Orders	Information for the XML document is extracted from the Supply Chain Business Modeler. Data in this document is used to establish a picture of existing transfer orders sent to the Supply Chain Business Modeler. This picture of the existing orders will be used to populate original order data in the planning instance and also identify orders that will be marked as canceled as a result of the optimized plan. Any order sent into the Supply Chain Business Modeler but not received back on a net deployment out of the Supply Chain Business Modeler will assumed to be canceled.
Work Orders	Information for the XML document is extracted from the Supply Chain Business Modeler. Data in this document is used to establish a picture of existing production orders sent to the Supply Chain Business Modeler. This picture of the existing orders will be used to populate original order data in the planning instance and also identify orders that will be marked as canceled as a result of the optimized plan. Any order sent into the Supply Chain Business Modeler but not received back on either a net production requirement or a production schedule out of the Supply Chain Business Modeler will assumed to be canceled.
Enterprise Forecast	The Enterprise Forecast XML document contains forecast information that was generated by Demand Management (DM). Only inventoried items are sent to the Supply Chain Business Modeler as a part of the standard integration so it is assumed that only Inventory Item forecast will be received out of the Supply Chain Business Modeler.
Net Deployment Requirements	The Net Deployment Requirements XML document contains information about inventory transfers between two business units and represents results out of the Production and Distribution Planning (PDP). Details for net deployments may contain data for existing transfers as well as new inter unit transfer requirements.

XML Document	Associated Data
Net Production Requirements	The Net Production Requirements XML document contains information about production requirements for an item at a given branch and represents the results out of the Production and Distribution Planning (PDP). Details for net production requirements may contain data for existing production as well as new production requirements.
Production Schedules	The Production Schedule XML document contains detailed production information including specific operations, resources, and material to use in the manufacturing process. Production schedule information can be produced by Production and Distribution Planning and production schedule information can also be produced by Production Scheduling Discrete (PSD) and Production Scheduling Process (PSP). Production Schedules may contain both existing and new production.
Purchase Order Recommendations	The purchase order recommendations XML document contains information regarding purchases that need to be made based on predefined supplier/item relationships. Purchase order recommendations can be produced by Production and Distribution Planning. The information may contain both new and existing purchase orders.

See Also

Committing PeopleSoft Supply Chain Planning Updates 8.8 PeopleBook, “Posting PeopleSoft Supply Chain Planning Updates to the Transaction System”

Demand Management Overview Guide

Strategic Network Optimization User Guide

Production & Distribution Planning User Guide

Production Scheduling-Discrete User Guide

Production Scheduling-Process User Guide

Supply Chain Business Modeler Integration PeopleBook

Exporting Data to Supply Chain Business Modeler

This section discusses how to export data to Supply Chain Business Modeler.

Page Used to Export Data to Supply Chain Business Modeler

Page Name	Object Name	Navigation	Usage
Export data to SCBM	APS_OUT_RUN	Data Exchanges, Advanced Planning, Export data to SCBM	Initiate the Export data to SCBM - Single Application Engine process (APS_O_MAIN) or initiate the Export data to SCBM - Multi Application Engine process (APS_OUT). Both of these processes export the XML documents from PeopleSoft Supply Chain Management to the Supply Chain Business Modeler. The Export Data to SCBM - Single process runs the XML documents serially where as the Export Data to SCBM - Multi process allows for the XML documents to be generated in parallel and can take advantage of multiple CPU environments.

Exporting Data to Supply Chain Business Modeler

Access the Export data to SCBM page.

Export data to SCBM

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

Fences			
Current Option:	Offset	Current Offset:	0
Start:	-30	End:	365
		History Start:	

Filters	Global Defaults
*Item SetID: US001	*Base Currency: USD *Rate Type: AVG
<input type="checkbox"/> Include Quotes Quote %	Constrained Item Fence:
<input type="checkbox"/> Reverse Quarantine Quantity	Fixed Production Fence:
	Item Group Option: Family

Model Documents			
<input checked="" type="checkbox"/> Configuration	<input checked="" type="checkbox"/> Distribution	<input checked="" type="checkbox"/> Forecasts	<input checked="" type="checkbox"/> Beginning Inventory
<input checked="" type="checkbox"/> Calendar	<input checked="" type="checkbox"/> Supplier	<input checked="" type="checkbox"/> Sales Order	<input checked="" type="checkbox"/> Work Orders
<input checked="" type="checkbox"/> Base	<input checked="" type="checkbox"/> Customer	<input checked="" type="checkbox"/> Sales Order History	<input checked="" type="checkbox"/> Purchase Orders
<input checked="" type="checkbox"/> Select All <input type="checkbox"/> Clear All	<input checked="" type="checkbox"/> Manufacturing	<input checked="" type="checkbox"/> Transfer Orders	<input checked="" type="checkbox"/> Safety Parameters

*Write export file to: k:\server\exportdata

Export data to SCBM page

Fences

Current Option

Select how you want to specify the current date. You can enter a specific date or an offset in days from the system date. Values are:

- *Date*
- *Offset*

Current Date

Select the current date. This field is available if you select *Date* as the Current Option.

Current Offset

Enter the current offset in days. This field is available if you select *Offset* as the Current Option.

Start

Enter the start fence in days from the current time. This value can be negative and the start fence must be less than or equal to the current time.

End

Enter the end fence in days from the current time. This value can be negative and the end fence must be greater than the current time.

History Start

Enter the history start fence in days from the current time. This value can be negative and the history start fence must be less than current time.

The system will only use the history start fence when selecting data for the Sales Order History XML Document.

Filters

Item Set ID	Select the item Set ID for the data that you would like to export to Supply Chain Business Modeler.
Include Quotes	Select this check box if you want to include quotes in the data that is passed to the Supply Chain Business Modeler.
Quote % (quote percentage)	If you select to include quotes, then enter the quote percentage to include. Quotes with an acceptance percentage equal to or greater than the value entered will be included in the data sent to the Supply Chain Business Modeler.
Reverse Quarantine Qty (reverse quarantine quantity)	Select this check box if you want to reverse the quarantine quantity from the quantity on hand that is sent to the Supply Chain Business Modeler using the Base XML document.

Global Defaults

Base Currency	Select a base currency. This currency and rate are used for formatting costs and prices into a common currency within Supply Chain Business Modeler.
Rate Type	Select a rate type. This currency and rate are used for formatting costs and prices into a common currency within Supply Chain Business Modeler.
Constrained Time Fence	Enter a constrained time fence in number of days. This value must be greater than or equal to zero. The Base XML Document uses this value to populate the constrained item fence value directly on the Item Branch attribute.
Fixed Production Fence	Enter a fixed production fence in number of days. This value must be greater than or equal to zero. The Base XML Document uses this value to populate the fixed production fence attribute on machines, crews, and tools directly.
Item Group Option	Select how you want to control formatting of the item group within Supply Chain Business Modeler. Values are: <ul style="list-style-type: none"> • <i>Family</i>: Item Family • <i>Group</i>: Item Group

Model Documents

Configuration, Calendar, Base, Distribution, Supplier, Customer, Manufacturing, Forecasts, Sales Orders, Sales Order History, Transfer Orders, Beginning Inventory, Work Orders, Purchase Orders, and Safety Parameters	Select the check box next to each of the different types of XML documents that you want to have created and exported to the Supply Chain Business Modeler.
--	--



Click theSelect All button to select all of the XML Documents at once.



Click theClear All button to clear the selection of any XML Documents.

Write Export Files To

Enter the output directory, folder, or URL for the exported XML Documents.

Importing Data From Supply Chain Business Modeler

This section discusses how to import data from Supply Chain Business Modeler.

Page Used to Import Data From Supply Chain Business Modeler

Page Name	Object Name	Navigation	Usage
Import data from SCBM	APS_IN_RUN	Data Exchanges, Advanced Planning, Import data from SCBM	Initiate the Import data from SCBM - Single Application Engine process (APS_I_MAIN) or initiate the Import data from SCBM - Multi Application Engine process (APS_IN). Both of these processes import the XML documents from the Supply Chain Business Modeler to PeopleSoft Supply Chain Management. The Import data from SCBM - Single process runs the XML documents serially where as the Import data from SCBM - Multi process allows for the XML documents to be generated in parallel and can take advantage of multiple CPU environments.

Importing Data From Supply Chain Business Modeler

Access the Import data from SCBM page.

Import data from SCBM

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

Update Planning Data

☒ **Published Forecast**
☒ **Planning Instance**
Planning Instance:

☒ **Net Deployment Requirements**
☒ **Purchase Order Recommendations**

☒ **Net Production Requirements**
☒ **Production Schedule**

***Import files from:**

Import data from SCBM page

Published Forecast	Select this check box if you want to want to update published forecast planning data to PeopleSoft Supply Chain Management.
Planning Instance, Planning Instance	Select this check box if you want to update a particular planning instance of planning data to PeopleSoft Supply Chain Management. Then enter the planning instance in the Planning Instance field.
Net Deployment Requirements	If you select to update by planning instance, then select this check box if you want to import net deployment requirements.
Net Production Requirements	If you select to update by planning instance, then select this check box if you want to import net production requirements.
Purchase Order Recommendations	If you select to update by planning instance, then select this check box if you want to import purchase order recommendations.
Production Schedule	If you select to update by planning instance, then select this check box if you want to import the production schedule.
Import Files From	Enter the location of the XML documents that you want to import.

PART 10

Integrating to Sales and Use Tax Applications

Chapter 15

Calculating Sales and Use Tax in Supply Chain Management

CHAPTER 15

Calculating Sales and Use Tax in Supply Chain Management

This chapter provides an overview of PeopleSoft tax solutions, and discusses how to:

- Compare PeopleSoft tax tables to third-party tax vendors.
- Set up third-party tax vendors.
- Associate address information with geocodes.
- Interact with third-party tax vendors.
- View tax errors in PeopleSoft Billing.
- Review third-party tax liability reporting.
- Compare U.S. and Canadian tax support.
- Compare third-party tax vendor fields to PeopleSoft Billing fields.
- Compare third-party tax vendor fields to PeopleSoft Order Management fields.
- Map sales tax for Taxware and Vertex in PeopleSoft Order Management.

See Also

Appendix A, “Installing Third-Party Tax Applications,” page 297

Understanding PeopleSoft Tax Solutions

PeopleSoft Billing supports the use of three sales and use tax solutions: PeopleSoft Tax Tables, Vertex, or Taxware. With our PeopleSoft Billing application, we deliver PeopleSoft Tax Tables, which meet simple sales tax requirements but require you to maintain tax rates. We also provide interfaces that fully enable PeopleSoft Billing to use two third-party tax vendors: Taxware and Vertex. These vendors provide solutions to the most complex sales tax requirements and maintain tax rates for you.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Defining Financials and Supply Chain Management Common Definitions,” Defining PeopleSoft Sales and Use Tax Authorities and Codes

Comparing PeopleSoft Tax Tables to Third-Party Tax Vendors

Third-party tax solutions provide a more complex set of features for sales and use tax calculations than PeopleSoft tax tables. The following table compares PeopleSoft tax tables with third-party vendors:

PeopleSoft Tax Tables	Third-Party Vendors
You must manually maintain tax rates.	The vendor provides monthly tax updates.
You must determine and manually check for exemptions. Exemption status is not determined at the time of calculation. If an order line, bill line, or purchase order line is not marked as tax exempt, taxes are calculated.	The tax vendor system determines exemption status at the time of tax calculation. The tax vendor system maintains customer exemption certificates and product taxability rules.
Tax rates come from the tax authorities of a tax code on the transaction. A tax code loosely represents a taxing jurisdiction. In PeopleSoft Billing, the tax code can be entered manually on a bill line, or it can default automatically from the ship to customer onto the bill during bill entry or through the bill interface. In PeopleSoft Order Management, the tax code can be entered manually, or it can default automatically from the ship to customer for the order line or schedule. In PeopleSoft Purchasing, the tax code can be entered manually on a purchase order, or it can default automatically from the ship to location to the purchase order schedule.	Tax rates and jurisdictions are determined from ship to, ship from, order origin, and order acceptance address information on the transaction.
Tax liability is maintained in separate accounts for each tax authority.	Tax liability is maintained in one account for the business unit.

Setting Up Third-Party Tax Vendors in PeopleSoft SCM

PeopleSoft Billing, Order Management, and Purchasing support the third-party tax applications Taxware Sales and Use Tax and the Vertex Quantum Sales and Use Tax. Both third party tax software provide solutions to complex sales tax requirements, and they maintain tax rates for you.

Note. If you use Taxware, PeopleSoft Billing, PeopleSoft Order Management, and PeopleSoft Purchasing require the Sales and Use Tax module for Taxware. The Taxware STEP and Verazip modules are optional but recommended. Check with the tax vendors for the versions of their software that are available for the different releases of PeopleSoft.

Note. The following steps are necessary to complete third party tax vendor installation. Even if the third party tax vendor software is physically installed on the application server or process scheduler, third party tax calculations cannot be performed without completing these steps.

To set up a third-party tax vendor:

1. (Required) Select a tax vendor on the Installation Options - Overall/GL (installation options - overall/general ledger) page.
The selection in the Tax Vendor group box determines which tax vendor is installed for the PeopleSoft database. This tax vendor validates postal codes on customer address, vendor address, location address, and transaction address pages. This is the same vendor that you will use for tax calculations.
2. (Required for Taxware) Define the tax vendor installation options on the Tax Provider Installation page.
3. (Required) Select the tax vendor on the Billing Definition - Business Unit 2 page and the Taxes and Currency page of the PeopleSoft Order Management business unit definition. Transactions in these business units will have tax calculations performed by the installed tax vendor.
4. (Required for PeopleSoft Purchasing) Select the tax vendor on the Purchasing Definition - Business Unit Definition page.

Order to Cash-Specific Tax Vendor Setup

Complete these steps for PeopleSoft Billing and PeopleSoft Order Management:

1. Set up tax customer groups.
You can associate ship to customers with tax customer groups by selecting *Tax* as the group type. The system passes both the customer ID and tax customer group through the interface to the tax vendor to find exceptions in the tax vendor database based on customer or customer group.
2. Predefine exemption certificates for eligible customers on the General Information - Tax Exempt Certificate Info page, if customer exemption will be maintained in PeopleSoft instead of in the third party tax vendor's database.
When you enter sales orders that are exempt from taxes, select the Tax Exempt check box on the Header Ship-To Defaults page, and select from the exemption certificates defined for the customer.
When entering bill lines that are exempt from taxes, select the Tax Exempt option on the Standard Billing - Line - Tax Info page, and select from the exemption certificates defined for the customer.
The Tax Exempt option on the sales order or bill line is the only way to override third-party tax vendor tax rules. The third-party tax vendor software logs the transaction as a user exception and does not tax the line.

The following steps are specific to PeopleSoft Order Management:

1. Define tax options for a product on the Product Definition - Options page.
Associate a tax product number defined on the third party tax database with the product identifier. The system passes the tax product number to the third-party tax vendor system during tax calculation. Users may define special rates or exceptions for the tax product number in the tax vendor system. The third-party tax vendor determines the correct tax rate for the product.
The transaction type and subtype that you enter are default values that the system passes to the third-party tax vendor system during tax calculation.

2. Associate the product with a tax product group on the Product Group page.

The system passes the tax product group to the third party tax vendor system during tax calculation. Users may define special rates or exceptions for the tax product group in the tax vendor system. The third-party tax vendor determines the correct tax rate for the product group.

The following step is specific to PeopleSoft Billing:

Define tax defaults for Billing charge codes on the Charge Code page.

Associate a charge code tax group with a PeopleSoft Billing charge code. Also define a default transaction type and subtype to be passed to the third party tax vendor system during tax calculation for a bill line for this Billing charge code.

See Also

PeopleSoft Working with Customers and Orders 8.8 PeopleBook, “Maintaining General Customer Information,” Adding General Customer Information

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Setting Installation Options for PeopleSoft Applications,” Setting Up Cross-Application Installation Options

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Setting Installation Options for PeopleSoft Applications,” Defining Tax Provider Installation Options

PeopleSoft Order Management 8.8 PeopleBook, “Maintaining Order Header and Line Information”

PeopleSoft Billing 8.8 PeopleBook, “Establishing PeopleSoft Billing Business Units”

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

PeopleSoft Purchasing 8.8 PeopleBook, “Defining PeopleSoft Purchasing Business Units and Processing Options,” Understanding Business Units in PeopleSoft Purchasing

Understanding Tax Product Groups

Set up charge code and product tax groups to take advantage of exception processing in the third-party tax vendor system. These tax groups must be defined in the tax vendor system. The PeopleSoft tax group must correspond to the product category in Vertex, or the product code defined in Taxware. You can create or update charge codes and products with the applicable tax groups. In PeopleSoft Billing, the system populates on a bill the charge code tax group by default during bill entry, and the system passes that value to the tax vendor during tax calculation.

If you use Taxware, you can create tax groups equal to the product codes supplied by Taxware that apply to your business. You can also use the Taxware STEP system to set up taxability exceptions for tax groups defined in PeopleSoft that are not equivalent to Taxware product codes.

If you use Vertex, you can set up tax exceptions for product categories and product IDs. The product categories defined in Vertex should also be defined as tax groups in PeopleSoft. You may need to add the products defined in PeopleSoft as Vertex product IDs, if you define tax exceptions by product IDs.

Tax Product Groups in PeopleSoft Order Management

The sales order line and schedule designate a product ID. You can associate a tax product group with the product. PeopleSoft Order Management sends the product ID and the tax product group to the third party tax vendor system which determines what takes precedence when retrieving the appropriate tax rate used in tax calculation.

Tax Product Groups in PeopleSoft Billing

The bill line contains two product-related fields: the Identifier field and the Tax Group field. The system passes both fields to the third-party tax vendor system. If you use Vertex, the tax group corresponds to the product category, and the identifier corresponds to the product ID. If you use Taxware, the tax group corresponds to the product code, so this field must be populated for Taxware to find tax exceptions by product code. When you enter a line during bill entry, the tax group on the line appears by default from the tax group associated with the charge code used as the identifier.

See Also

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

Associating Address Information With Geocodes

A combination of addresses stored on a transaction enables the tax vendor system to determine which taxing jurisdictions and tax rates to use. Each address can be associated with a geocode provided by the tax vendor system.

This section provides an overview of geocodes and discusses how to associate customer and location addresses with geocodes.

Understanding Geocodes

Both Taxware and Vertex use geocodes, although each tax vendor system uses it differently. If you set up the installation options to use a third party tax vendor, changing a postal code on any address page invokes the Tax Geocode Selection page.

Additionally, on any page where geocodes can be assigned, you can click the Geocode Lookup link to access the Tax Geocode Selection page. This link appears only if the installation options specify a tax vendor, and the address country is U.S.A. or Canada.

Note. The Geocode Lookup link does not appear on PeopleSoft Order Management pages, including the customer address page.

Using Geocodes With Taxware

During geocode lookup, the system passes to the third-party tax vendor the state and postal code on an address. Taxware uses the state and postal code to determine the geocode. However, if you also provide a city on the address, Taxware uses that city (along with the state and postal code) to narrow the geocodes that it returns.

Note. If you use Taxware and you include a city when retrieving a geocode, the city, state, and postal code combination must be valid to ensure that the system returns a valid geocode.

Invalid addresses produce a jurisdiction-determination error, which prevents the system from calculating taxes.

Using Geocodes With Vertex

During geocode lookup, the system passes to the third-party tax vendor the postal code on an address. Vertex uses the postal code to determine the geocode. If you populate the State field but provide a postal code that is not within that state, the system does not return any valid geocodes.

During tax calculation, if a Vertex geocode is associated with the address information, the vendor software uses that value to identify the taxable location. Otherwise, the system uses the rest of the address information. Invalid addresses result in a jurisdiction-determination error, which prevents the system from calculating taxes.

Note. If you use Vertex, it is recommended that you assign geocodes to customer address information. If address information is passed to Vertex without a geocode, Vertex assigns the geocode with the highest tax rate from the possible choices during tax calculation.

Pages Used to Associate Address Information With Geocodes

Page Name	Object Name	Navigation	Usage
Tax Geocode Selection	TAX_GEOCODE_TMP	Change the postal code on any address page, or click the Geocode Lookup link, if available.	Select a specific geocode to associate with an address.

Associating Addresses with Geocodes

Access the Tax Geocode Selection page.

Geocode	Select a single geocode to associate with an address.
Auto Fill Address	Select to have the system populate the address page with information from the selected geocode. This option is enabled by default.
In City Limit	If populated, indicates that the address is within the city limit.

Important! If you click OK without selecting a geocode or you click Cancel, the postal code reverts to the original.

Warning! When you select a geocode, the city and state from the geocode page overrides the city and state on the original address page if you also selected the Auto-Fill Address option. If you attempt to change the state or city after a geocode has been assigned, a warning message appears with the option to clear old geocodes, to prevent inconsistency between the assigned geocode and the rest of the address.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, “Creating Purchase Orders Online,” Entering PO Schedule One Time Address Information

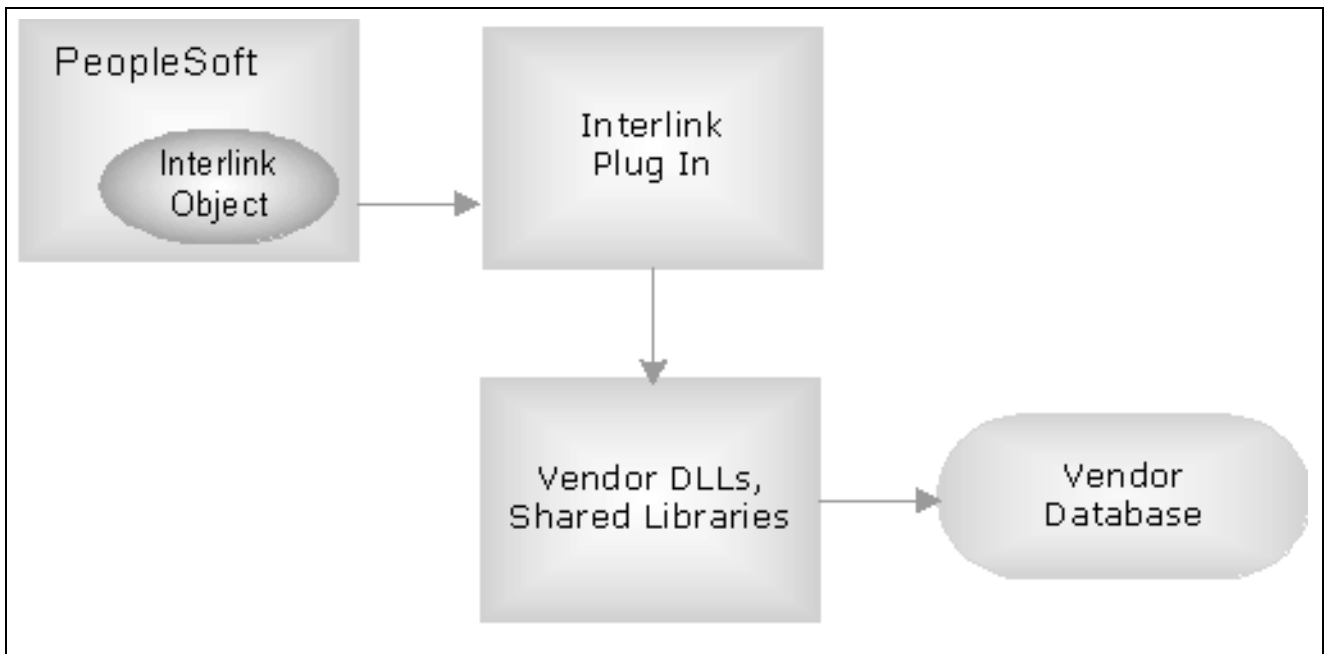
Interacting With Third-Party Tax Vendors

PeopleSoft Billing, PeopleSoft Order Management, and PeopleSoft Purchasing interact with third-party tax software during the following instances:

- Geocode lookup.
- Online tax calculation in PeopleSoft Order Management, PeopleSoft Billing, and PeopleSoft Purchasing.
- Order completion processing (batch processing in PeopleSoft Order Management).
- Invoicing (batch processing in PeopleSoft Billing).
- Procurement cards (batch processing in PeopleSoft Purchasing).

Note. The ship to customer ID and address number are required for all third-party tax processing.

To interact with the third-party tax software, you need a valid interlink plug-in which is provided by the third party tax vendor. The interlink plug-in on Windows NT/2000 systems is psbivrtx.dll for Vertex and pstwlink.dll for Taxware.



Third-party software integration

LIBPSBIVRTX and LIBPSTWLINK are the corresponding Vertex and Taxware shared library names used in UNIX environments for the plug-ins. These shared libraries (or shared objects) can have different extensions depending on the UNIX operating system. The .SL extension is used in HP UNIX. AIX uses the .A extension. Solaris and TruUnix use the .SO extension. The generic tax vendor dynamic link libraries (DLLs), or shared libraries, are the ones typically delivered by the tax vendors to all customers. Each vendor has a unique set of libraries or DLLs. The tax vendor database objects are the repositories for their geocodes, tax rates, exception information, and transaction repository.

If the ship to address is not a U.S. or Canadian address, the system does not send the line to the tax vendors for calculation.

Calculating Taxes in PeopleSoft Order Management

In PeopleSoft Order Management, the system calculates and saves taxes when you change the order and click the Calculate Price button. The Order Completion process calculates taxes for orders that are entered using electronic data interchange, returned material authorization replacement sales orders, and buying releases. The system uses this tax information when printing sales orders acknowledgments and quotations. You can also view the summarized tax amount on the Order Entry Form page.

The calculated tax amount is only an estimate of taxes for an order, and it is not posted to any tax registers. If you have PeopleSoft Billing installed, the system recalculates taxes even if they have been calculated previously in the order entry process online or by the Order Completion process.

Note. PeopleSoft Order Management does not pass tax calculations to PeopleSoft Billing.

Calculating Taxes in PeopleSoft Billing

In PeopleSoft Billing, the system calculates taxes when you click the Calculate Taxes button on the Bill Summary page, and when you run the pro forma or finalization process.

Note. The system does not calculate taxes or VAT for a bill line when the bill line's tax timing option (populated by PeopleSoft Contracts) is defined as *S* (taxes on services rendered).

Calculating Taxes in PeopleSoft Purchasing

In PeopleSoft Purchasing, the system calculates taxes when you select the Calculate Sales and Use Tax option on the Maintain Purchase Order - Purchase Order page. When you select this option, the system evokes the TaxCalc API process, which calculates your sales and use tax.

See Also

PeopleSoft Order Management 8.8 PeopleBook, "Processing Sales Orders,"
Running Order Completion/Repricing

PeopleSoft Purchasing 8.8 PeopleBook, "Creating Purchase Orders Online," Creating Purchase Order Headers

Interacting With Third-Party Tax Vendors During Geocode Lookup

If you selected a third-party tax vendor on the Installation Options - Overall/GL page, the system calls the third-party vendor geocode lookup functions when you change the postal code on any of the following:

- Location - Location Definition page.
- Customer address pages.
- PeopleSoft Billing Ship-to Override page.
- PeopleSoft Purchasing Schedule One-Time Address page.

When you change the postal code, or click on the geocode lookup hyperlink, the following events take place:

1. For Canadian and U.S. addresses, PeopleCode instantiates a business interlink object that is tied to the vendor plug-in.

For Vertex, the business interlink object VERTEX_GEOCODES is instantiated. For Taxware, the business interlink object TAXWARE_GEOCODES is instantiated. If the address is not in Canada or the U.S., no further processing takes place.

2. After instantiation, the system populates all of the business interlink input fields, calls the plug-in, and retrieves the results from the business interlink object.
3. The system displays all geocode hits from the tax vendor system on the Tax Geocode Selection page.

Note. Selecting Taxware or Vertex as the tax vendor on the Installation Options - Overall/GL page controls only geocode lookups. This option does not control any tax calculations.

See Also

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

PeopleSoft Order Management 8.8 PeopleBook, “Processing Sales Orders,”
Running Order Completion/Repricing

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Setting Installation Options for PeopleSoft Applications,” Setting Up Cross-Application Installation Options

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,” Setting Up Locations

PeopleSoft Billing 8.8 PeopleBook, “Entering Bills Online,” Entering Bill Source Information

PeopleSoft PeopleTools PeopleBook: PeopleSoft Business Interlink Application Developer Guide

PeopleSoft Purchasing 8.8 PeopleBook, “Creating Purchase Orders Online,” Entering
PO Schedule One Time Address Information

Interacting With Third-Party Tax Vendors During Online Tax Calculations

The second instance of interaction occurs during online tax calculation.

Online Tax Calculation in PeopleSoft Order Management

You trigger online tax calculations in PeopleSoft Order Management on the order line and order schedule pages by saving a valid order or by clicking the Calculate Price button on the Order Entry Form or Shipment Schedules page.

The following occurs in online tax calculation for sales orders in a business unit that uses the installed third party tax vendor:

1. PeopleCode collects the necessary data for the order, including the tax organization and division, the line or schedule quantity, and the line or schedule amount.

Once the required data is gathered, PeopleCode instantiates a business interlink object that is tied to the vendor plug-in. For Vertex, the interlink object VERTEX_CALCTAX is instantiated. For Taxware, the interlink object TAXWARE_CALCTAX is instantiated.

2. After instantiation, the system populates all of the business interlink input fields, calls the plug-in, and retrieves the results from the business interlink object.
3. PeopleCode updates the PeopleSoft Order Management tables with tax information, including the tax amount and tax percentage. The taxes calculated in PeopleSoft Order Management are only temporary and are not logged by the tax vendor software.

Online Tax Calculation in PeopleSoft Billing

You trigger online tax calculations on the Bill Summary Info page by clicking the Calculate Taxes button if the current PeopleSoft Billing business unit is defined as using an installed third party tax vendor. When you click Calculate Taxes, the following occurs:

1. PeopleCode instantiates a business interlink object that is tied to the vendor plug-in.
For Vertex, the business interlink object VERTEX_CALCTAX is instantiated. For Taxware, the business interlink object TAXWARE_CALCTAX is instantiated.
2. After instantiation, the system populates all of the business interlink input fields, calls the plug-in, and retrieves the results from the business interlink object.
3. The system displays the total tax amount on the Bill Summary Info page.
4. Click the Save button to update the PeopleSoft Billing tables.

You can view the detailed tax information on the Standard Billing - Line Tax page. The taxes calculated from the Bill Summary page are only temporary and are not logged by the vendor software.

Online Tax Calculations in PeopleSoft Purchasing

You trigger online tax calculations on the Maintain Purchase Order - Purchase Order page by clicking the Calculate Sales and Use Tax option.

The following occurs in online tax calculation for purchase orders in a business unit that uses the installed third party tax vendor:

See Also

PeopleSoft Billing 8.8 PeopleBook, “Entering Bills Online,” Reviewing Bill Summary Information

[Appendix A, “Installing Third-Party Tax Applications,” page 297](#)

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

PeopleSoft Purchasing 8.8 PeopleBook, “Creating Purchase Orders Online,” Creating Purchase Order Headers

Interacting With Third-Party Tax Vendors During Invoicing

The third instance of interaction with third-party tax vendors occurs during pro forma invoicing and invoice finalization. During pro forma invoicing, the system writes nothing to the tax vendor audit or registry files; in finalization, the system logs and reports all transactions.

The Pre-Process and Finalization process (BIIVC000) or the single-bill Pro Forma process (BIIVC100) calls the Tax Interface process (BITAX000) when processing invoices in business units defined as using a third-party tax vendor. The following occurs in the Tax Interface process:

1. PeopleCode instantiates a business interlink object that is tied to the vendor plug-in.

For Vertex, the business interlink object VERTEX_CALCTAX is instantiated. For Taxware, the business interlink object TAXWARE_CALCTAX is instantiated.

2. For each taxable line, the system populates all of the business interlink input fields, calls the plug-in, and retrieves the results from the business interlink object.
3. The tax amounts are saved on the PeopleSoft Billing tables.
4. If the third party tax calculation detects errors, the third party system returns error codes to PeopleSoft. The system tags the bill and writes the error code to the specific line with the tax error.

In addition, the system enters a line in the message log for the erroneous line.

Note. You can run batch jobs for vendor and nonvendor bills if you use a single vendor. Running a batch job for business units using a combination of Vertex and Taxware, however, is not supported.

See Also

Appendix A, “Installing Third-Party Tax Applications,” page 297

PeopleSoft PeopleTools PeopleBook: PeopleSoft Business Interlink Application Developer Guide

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

Interacting With Third-Party Tax Vendors During the Order Completion Process

The Order Completion process calls third-party tax vendors and provides the necessary information to calculate tax for the order. The values for the taxes are estimates and are stored on the order.

See Also

PeopleSoft Order Management 8.8 PeopleBook, “Processing Sales Orders,” Understanding Order Entry Required Processing

Viewing Tax Calculation Errors in PeopleSoft Billing

The method that you use to calculate taxes determines how you locate information in PeopleSoft Billing about resulting tax calculation errors.

This section discusses how to:

- View errors when calculating taxes online.
- View errors when calculating taxes through the invoicing process.

Viewing Errors When Calculating Taxes Online

If you calculate taxes online by clicking the Calculate Taxes button on the Bill Summary Info page and errors occur, the system displays a message containing the line with tax calculation errors and a vendor error code.

There are three levels of errors you might receive:

- Business interlink connectivity errors indicate missing DLLs or shared libraries, or permission errors.

An error message appears.

- Vendor database connectivity errors indicate trouble connecting to the vendor database.

An error message appears with a vendor return code.

- Tax calculation errors.

An error message appears with vendor return codes. The system writes the error message to the bill line tax record, and displays the message on the Standard Billing - Line - Tax Info page.

See Also

PeopleSoft Billing 8.8 PeopleBook, “Entering Bills Online,” Reviewing Bill Summary Information

PeopleSoft Billing 8.8 PeopleBook, “Entering Bills Online,” Entering Tax Information

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

Viewing Errors When Calculating Taxes Through the Invoicing Process

If you calculate taxes from invoice pro forma or finalization, the message log reports how many bills it finds with errors. On the Invoice and Line Errors page, you can view a list of bill lines and the error codes and descriptions associated with them.

Note. Refer to third-party documentation for a complete description of vendor-returned errors.

See Also

PeopleSoft Billing 8.8 PeopleBook, “Generating Invoices,” Inquiring About Individual Invoice Errors

Reviewing Third-Party Tax Liability Reporting

When using the PeopleSoft delivered tax solution, you can set up different liability accounting information for each tax authority. When using Taxware or Vertex, however, each PeopleSoft Billing business unit can have only a single distribution code to use in recording general ledger information for taxes. Canadian tax support is the only exception to this rule.

Comparing U.S. and Canadian Tax Support

The following are some differences between the U.S. and Canadian third-party tax solutions support:

Note. Consult your vendor documentation for more information.

- The tax calculation routines calculate provincial sales tax (PST) and goods and services tax (GST) if given valid postal codes.
- For U.S. taxes, you can only use one sales and use tax liability account for each PeopleSoft Billing business unit in both Taxware and Vertex.

When you set up a Canadian PeopleSoft Billing business unit—that is, a Billing business unit with a base currency of CAD—an additional distribution field appears that enables you to enter a separate tax liability distribution code for GST. This field appears only when you create a Billing business unit tied to a PeopleSoft General Ledger business unit that uses the Canadian dollar as its base currency.

See Also

Canadian Tax Processing section in the Taxware Technical Reference manual.

APPENDIX A

Installing Third-Party Tax Applications

This appendix provides an overview of the architecture of PeopleSoft Business Interlinks and discusses how to:

- Identifying vendor plug-in locations.
- Identifying vendor dynamic link libraries (DLLs) and shared library locations.
- Install and test vendor databases.
- Troubleshoot installation errors.

See Also

Part 10, “Integrating to Sales and Use Tax Applications,” page 281

PeopleSoft Working with Customers and Orders 8.8 PeopleBook, “Installing the PeopleSoft Credit Card Interlink”

Understanding the Architecture of PeopleSoft Business Interlinks

PeopleSoft delivers four business interlink objects to interact with Vertex and Taxware for both online and batch transactions. All business interlink objects must point to an interlink plug-in provided by the tax vendor to function properly.

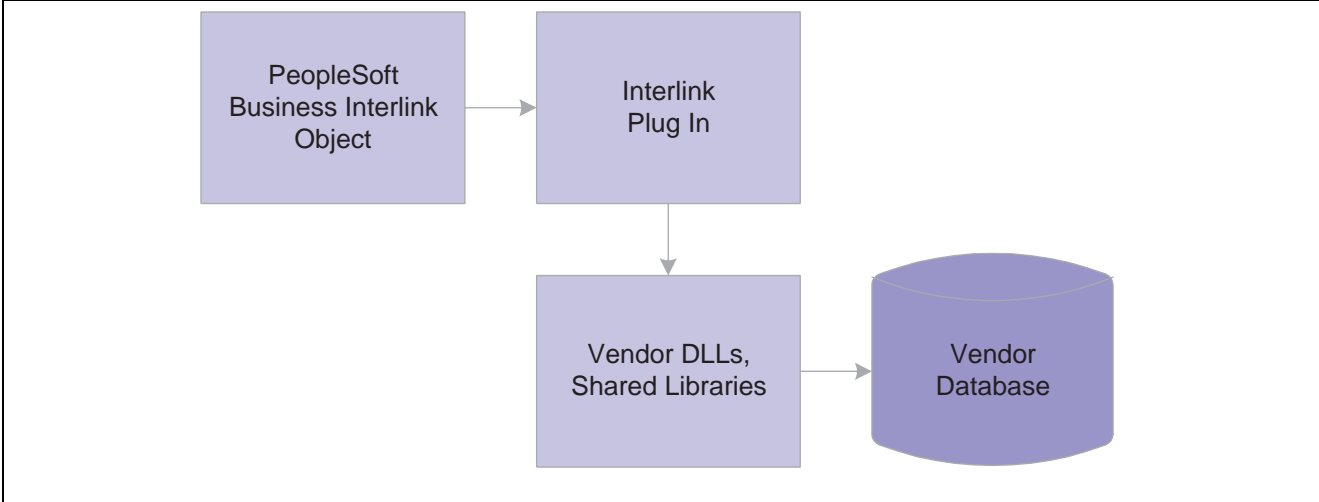
As part of each business interlink object setup, the parameter URL points to the interlink plug-in used to process transactions. For Vertex and Taxware, this is set to point by default at the Windows DLL delivered to PeopleSoft customers by each tax vendor.

UNIX Environments

When running the system on UNIX environments, although the business interlink object definition points to a Windows DLL, the business interlink architecture converts the name from a DLL to a UNIX shared library or shared object. The business interlink architecture adds the prefix *lib* to the name, and adds the appropriate extension for each UNIX platform to replace the DLL extension.

Business Interlink Architecture Flow

The following diagram illustrates the business interlink architecture flow:



Business interlink architecture flow

In the preceding diagram, the PeopleSoft box can represent a two-tier client (now only used to run PeopleSoft Application Designer), the application server, or the PeopleSoft Process Scheduler server.

You can only perform two-tier testing on a Windows client running PeopleSoft Application Designer. Use Application Designer to open the business interlink object definition and to run the business interlink tester.

Perform the setup tasks described in the following sections on each computer that is used as an application server or a PeopleSoft Process Scheduler server. You can also perform the setup on client workstations for two-tier testing. However, a setup on client workstations for two-tier testing may require additional vendor software, as the application server and PeopleSoft Process Scheduler server machines typically run under UNIX, while the client typically runs under Windows. Both Vertex and Taxware provide different sets of software depending on the operating system that you use to process tax calculations.

See Also

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

PeopleSoft PeopleTools PeopleBook: PeopleSoft Business Interlink Application Developer Guide

Identifying Vendor Plug-in Locations

By default, the PeopleSoft system searches for the interlink plug-in in the interface drivers directory, as described in the following table:

Location	Mode
<PS_HOME>\bin\client\winx86\interfacedrivers	For two-tier testing on Windows.

Location	Mode
<PS_HOME>\bin\server\winx86\interfacedrivers	For Windows application server and PeopleSoft Process Scheduler server.
<PS_HOME>/bin/interfacedrivers	For UNIX application server and PeopleSoft Process Scheduler server.

These directories also contain the XML script files that describe the interlink plug-in structure which were used to create the delivered business interlink objects in the PeopleSoft system. The XML script files have the same name as the Windows DLL plug-in, except that the .XML extension is used instead of the .DLL extension.

When you purchase the Vertex or Taxware software, each vendor provides the appropriate interlink plug-in that you must place in these directories. The copy under the Windows directory <PS_HOME>\bin\client\winx86\InterfaceDrivers is not used in production. The PeopleSoft Process Scheduler server and the application server use the plug-in copy in <PS_HOME>\bin\server\winx86\InterfaceDrivers on Windows, or <PS_HOME>/bin/interfacedrivers on UNIX.

Application Server Configurations

The application server configuration file has the following entry, which you can use to change the plug-in default location:

```
[PSTOOLS]
=====
; General settings for PSTOOLS
=====
; Uncomment this to specify an alternate directory to search for Interface Drivers.
; Business Interlink Driver Directory=
```

Process Scheduler Configurations

The PeopleSoft Process Scheduler configuration file contains the following entry, which you can use to change the plug-in default location:

```
;-----
; Uncomment to specify an alternate directory to search for Interface Drivers.
; Business Interlink Driver Directory=
```

Identifying Vendor DLLs and Shared Library Locations

Vendor-supplied DLLs or shared libraries can be placed in the following locations:

Windows NT

Typically, the vendor DLLs should be placed in the same directory as the PeopleSoft main executable file:

Location	Mode
<PS_HOME>\bin\client\winx86	For two-tier testing on Windows.
<PS_HOME>\bin\server\winx86	For Windows application server and PeopleSoft Process Scheduler server.

UNIX

Typically, the vendor shared libraries should be placed in the same directory with the other PeopleSoft libraries. This directory is <PS_HOME>/bin. It is usually one of the directories pointed to by the LIBPATH environment variable set up in the psconfig.sh UNIX shell script.

If the system cannot find either the plug-in DLL/shared library or vendor supplied DLL/shared library, an interlink connectivity error appears.

Setting up Tax Vendor Variables for Database Locations

Both Vertex and Taxware provide installation instructions for their software for different operating systems and database formats. Check with your vendor for supported operating system platforms and database types and installation instructions. Once you have installed the vendor software, test it outside of the PeopleSoft system. Both vendors provide utilities for testing their software outside of the PeopleSoft environment. Finally, you must provide a way for the vendor DLLs or shared libraries to find the location of the vendor database.

See Also

[Appendix B, “Installing Vertex,” page 303](#)

[Appendix C, “Installing Taxware,” page 307](#)

Troubleshooting Installation Errors

The sections discuss error messages that you may receive and suggestions for resolving the errors. For batch processing, similar error messages are placed in the message log of each failed process.

Two-Tier Testing, Interlink Tester With Plug-in or Vendor DLL Not Accessible

This message appears:



Cannot load plug-in error message

Check the client directories to ensure the plug-in and the vendor DLLs are in the correct directory. Check the vendor documentation for a complete list of required DLLs. This error may also be related to changes that you make to the Configuration Manager to change the location of the default interlink directory.

Three-Tier Geocode Look-up With the Interlink Plug-in Not Accessible

Check the directories on the computer running the application server and ensure that the plug-in and the vendor DLLs are in the correct directory. Check the vendor documentation for a complete list of required DLLs. This error may also be related to changes that you make to the Configuration Manager to change the location of the default interlink directory. Also check permissions of the plug-in and vendor DLLs.

Three-Tier Where the Vertex Open Fails on Geocode Look-up

This error message appears when the vendor software detects invalid vendor database pointers, permissions issues or other open failures:



Tax vendor error message

APPENDIX B

Installing Vertex

This appendix provides an overview of the architecture of PeopleSoft Business Interlinks and discusses how to:

- Setup variables for the Vertex database location.
- Troubleshoot installation errors.

See Also

Part 10, “Integrating to Sales and Use Tax Applications,” page 281

Appendix A, “Installing Third-Party Tax Applications,” page 297

Understanding the Architecture of PeopleSoft Business Interlinks

PeopleSoft delivers two business interlink objects to interact with Vertex for both online and batch transactions: VERTEX_CALCTAX and VERTEX_GEOCODES.

All business interlink objects must point to an interlink plug-in provided by the tax vendor to function properly.

As part of each business interlink object setup, the parameter URL points to the interlink plug-in used to process transactions. For Vertex, this is set to point by default at the Windows DLL delivered to PeopleSoft customers by each tax vendor. This object points to file://psbivrtx.dll.

UNIX Environments

When running the system on UNIX environments, although the business interlink object definition points to a Windows DLL, the business interlink architecture converts the name from a DLL to a UNIX shared library or shared object. The business interlink architecture adds the prefix *lib* to the name, and adds the appropriate extension for each UNIX platform to replace the DLL extension.

For example, the business interlink architecture changes the Windows DLL file psbivrtx.dll to libpsbivrtx.sl before each call to the interlink plug-in.

See Also

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

PeopleSoft PeopleTools PeopleBook: PeopleSoft Business Interlink Application Developer Guide

Setting up Variables for the Vertex Database Location

This section discusses how to:

- Setup Vertex on a Windows NT/2000 platform.
- Setup Vertex on a UNIX platform.

Setting up Vertex on a Windows NT/2000 Platform

Vertex provides a registry file to populate entries in the Windows NT/2000 registry. A typical file contains the following entries:

ab] (Default)	REG_SZ	(value not set)
ab] DebugLog	REG_SZ	c:\vertex30\debug
ab] DebugOn	REG_SZ	FALSE
ab] GeoDBDataSrc	REG_SZ	c:\vertex30\geocodes
ab] GeoDBPassword	REG_SZ	
ab] GeoDBServer	REG_SZ	
ab] GeoDBUser	REG_SZ	
ab] JurisNames	REG_SZ	
ab] RateDBDataSrc	REG_SZ	c:\vertex30\rates
ab] RateDBPassword	REG_SZ	
ab] RateDBServer	REG_SZ	
ab] RateDBUser	REG_SZ	
ab] RegDBDataSrc	REG_SZ	c:\vertex30\register
ab] RegDBPassword	REG_SZ	
ab] RegDBServer	REG_SZ	
ab] RegDBUser	REG_SZ	
ab] StatsOn	REG_SZ	FALSE
ab] TDMCacheAgeLimit	REG_SZ	3600
ab] TDMCacheSize	REG_SZ	16
ab] TDMCaseSense	REG_SZ	FALSE
ab] TDMDBDataSrc	REG_SZ	c:\vertex30\tdm
ab] TDMDBPassword	REG_SZ	
ab] TDMDBServer	REG_SZ	
ab] TDMDBUser	REG_SZ	
ab] UseTDM	REG_SZ	Y
ab] VVersion	REG_SZ	

Vertex registry file

For a Vertex ISAM database, provide values for xxxDBDataSrc. The value would be the directory containing the Vertex database. For relational database connection, the typical setup is to provide values for xxxDBServer, xxxDBPassword, and xxxDBUser, as follows:

```
RateDBDataSrc=
RateDBServer=qsu
RateDBPassword=solaris25
RateDBUser=solaris25
GeoDBDataSrc=
```

```

GeoDBServer=qsu
GeoDBUser=solaris25
GeoDBPassword=solaris25
RegDBDataSrc=
RegDBServer=qsu
RegDBUser=solaris25
RegDBPassword=solaris25
TDMDDataSrc=
TDMDBServer=qsu
TDMDBUser=solaris25
TDMDBPassword=solaris25

```

Note. There should be no blanks between the equal sign and the parameter entered. Consult the Vertex Softlink documentation for additional information.

Setting up Vertex on a UNIX Platform

Vertex provides a configuration file called PSVTXCFG that contains similar entries to the ones in a Windows registry. This file must be accessible to the vendor-supplied shared libraries. Define an environment variable called PSVTXCFG in psconfig.sh, and set it to point to the location of the configuration file. Define the variable for both the Application Server and the Process Scheduler so that it can be used by the Vertex software.

Troubleshooting Vertex Installation Errors

The error message *Three-Tier Where the Vertex Open Fails on Geocode Look-up* appears when the vendor software detects invalid vendor database pointers, permissions issues or other open failures:



Tax vendor error message

Check the Windows registry or Vertex UNIX configuration file PSVTXCFG to ensure entries are pointing to the correct locations. For a UNIX installation, ensure that the variable PSVTXCFG is defined in psconfig.sh, pointing to the directory that contains the PSVTXCFG file. Additionally, check for permissions problems.

APPENDIX C

Installing Taxware

This appendix provides an overview of the architecture of PeopleSoft Business Interlinks and discusses how to:

- Setup variables for the Taxware database location.
- Troubleshoot installation errors.

See Also

Part 10, “Integrating to Sales and Use Tax Applications,” page 281

Appendix A, “Installing Third-Party Tax Applications,” page 297

Understanding the Architecture of PeopleSoft Business Interlinks

PeopleSoft delivers two business interlink objects to interact with Taxware for both online and batch transactions: TAXWARE_CALCTAX and TAXWARE_GEOCODES.

All business interlink objects must point to an interlink plug-in provided by the tax vendor to function properly.

As part of each business interlink object setup, the parameter URL points to the interlink plug-in used to process transactions. For Taxware, this is set to point by default at the Windows DLL delivered to PeopleSoft customers by each tax vendor. This object points to file://pstwlink.dll for Taxware.

UNIX Environments

When running the system on UNIX environments, although the business interlink object definition points to a Windows DLL, the business interlink architecture converts the name from a DLL to a UNIX shared library or shared object. The business interlink architecture adds the prefix *lib* to the name, and adds the appropriate extension for each UNIX platform to replace the DLL extension.

For example, the business interlink architecture changes the Windows DLL file pstwlink.dll to libpstwlink.sl before each call to the interlink plug-in.

See Also

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

PeopleSoft PeopleTools PeopleBook: PeopleSoft Business Interlink Application Developer Guide

Setting up Variables for the Taxware Database Location

This section discusses how to:

- Setup Taxware on a Windows NT/2000 platform.
- Setup Taxware on a UNIX platform.

Setting up Taxware on a Windows NT/2000 Platform

Taxware provides three INI files that you need to set up to point to the location of the Taxware database directories:

- AVPTAX.INI
- AVPSTEP.INI.
- AVPZIP.INI.

Place all three files in the WINNT directory. Each file contains a set of pointer variables that you should point to the location where the Taxware database files were placed during Taxware software installation.

Note. Taxware opens the database files in read/write mode, even when only reading from them. You may encounter problems with permissions.

Setting up Taxware on a UNIX Platform

You must set up several environment variables with the location of the Taxware database files. Taxware provides a script called ENVARS that contains all the variables that need to be defined. In ENVARS, provide values for these variables, and then execute the ENVARS script when starting the Application Server and the Process Scheduler. A typical place to execute the ENVARS script is in psconfig.sh.

Note. Taxware opens the database files in read/write mode. Consequently, you may encounter problems with permissions.

Troubleshooting Taxware Installation Errors

The error message *Three-Tier Where the Vertex Open Fails on Geocode Look-up* appears when the vendor software detects invalid vendor database pointers, permissions issues or other open failures:



Tax vendor error message

Check the INI files or UNIX psconfig.sh environment variables to ensure that entries are pointing to the correct locations. Additionally, you should check for permissions problems.

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	<p>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.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>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.</p>

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.

	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <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	<p>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.</p> <p>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.</p>
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	<p>Data elements, at their simplest level, define a subset of data and the rules by which to group them.</p> <p>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.</p>
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	<p>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.</p> <p>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.</p>
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <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	<p>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.</p> <p>In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.</p>
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.
KPI	In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment. 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 <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> 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	Metastings are special expressions included in SQL string literals. The metastings, 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 <i>compensation object</i> .
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

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

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

statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <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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