PeopleSoft®

PeopleSoft Enterprise Supply Chain Management 8.9 Common Information PeopleBook

July 2005

PeopleSoft Enterprise Supply Chain Management 8.9 Common Information PeopleBook
SKU FSCM89CIN-B 0705

Contents

About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, 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.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. 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 applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed 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 website. 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, https://www.peoplesoft.com/corp/en/login.jsp

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 website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (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.

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.

If the note is preceded by *Important!,* the note 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.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 Used in PeopleBooks

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

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler

Enterprise PeopleTools 8.46 PeopleBook: Using PeopleSoft Applications

PeopleSoft Enterprise Supply Chain Management 8.9 Common Information PeopleBook 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

This book 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:

- *PeopleSoft Enterprise Applications Fundamentals 8.9 PeopleBook*
- *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 *PeopleSoft Enterprise PeopleTools 8.46 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 *PeopleSoft Enterprise PeopleTools 8.46 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 *PeopleSoft Enterprise PeopleTools 8.46 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 transaction.
Instance or Prcs Instance	The number that represents where the request is in the queue.

See Also

PeopleSoft Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Application Designer

CHAPTER 1

Getting Started with Supply Chain Management Common Information

This section provides an overview and discusses implementation information.

Understanding Supply Chain Management Common Information

Use this PeopleBook for common information on the following areas:

- Approvals Framework
- Setting up and using the Message Dashboard
- Pegging Supply and Demand
- Search Indexes Framework
- Printable Documents Framework

PeopleSoft SCM Common Information Implementation

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

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, "PeopleSoft Enterprise Application Fundamentals PeopleBook Preface"

CHAPTER 2

Using Workflow and Managing Approvals

This chapter provides an overview of approval workflow and discusses how to:

- Define approval workflow processes.
- Define the approval transaction registry.
- Define notification templates for approval workflow.
- Define user lists..
- Use dynamic approvals.
- Enable email collaboration.
- Use escalations.
- Using the approval monitor.

Understanding the Approval Workflow Engine

Many daily tasks are part of a larger process that involves several steps and people working together. The term *workflow* refers to this process, which could encompass, for example, the approval of a requisition or a change request form. To facilitate this type of multiuser process, PeopleSoft can automatically trigger workflow notifications to inform the next approver in the process of work awaiting them.

To address workflow approvals there is a specialized designer. This designer enables you to configure approval workflows using existing components without writing code.

Three types of users come together to set up approvals including application developers, functional business analysts, and the users that include requesters, approvers, and reviewers. The approval workflow framework brings these roles together to define an approval process workflow.

Application developers set up workflow approvals using a transaction-definition component. Examples of a transaction might include a requisition or service order. Transactions are made up of an approval process, routing rules and steps and a set of users who approve and review the transaction.

Using workflow approval processes, you can:

- Approve or deny individual line items in a transaction, such as a change request.
- Approve and deny multiple transactions at a single time..
- Include multiple approvers for individual steps.
- Assign additional approvers and reviewers during the approval process.
- Escalate approvals.
- Approve, deny, push back, and delegate approvals.

- Reassign approval tasks to another approver.
- Use Worklist and email notifications.

Defining Approval Workflow Processes

This section provides an overview of approval workflow, header and line-level approvals, approval flows, and event notification and discusses how to:

- Define approval workflow process stages.
- Define criteria for approval workflows.
- Set up approval workflow paths.
- Define steps for approval workflows.

Understanding Approval Workflow

Approval workflows are triggered when requesters originate a transaction, such as a requisition, and a set of approvers carry out tasks related to the transaction. The PeopleSoft approval workflow process is a framework that enables three levels of users, from technical to end-users, to develop, configure, and use transaction approvals that meet their organizational requirements. For example, the process of submitting a requisition and getting it approved requires defining who should approve the requisition, the order in which they approve it, and how it is routed to approvers.

In contrast to the standard PeopleSoft Workflow, which requires advanced technical skills in PeopleTools to create and maintain, approval workflow provides an alternative workflow that is much easier to create and maintain. For example, all of the steps in approval workflow are defined using PeopleSoft pages rather than underlying PeopleCode, so functional users can design and maintain workflow using these online PeopleSoft pages instead of requiring technical developers to create workflow rules.

The following PeopleSoft products are delivered with integrated approval workflows:

- PeopleSoft Supplier Contracts
- PeopleSoft Promotions Management
- PeopleSoft Expenses
- PeopleSoft Strategic Sourcing
- PeopleSoft eProcurement
- PeopleSoft Services Procurement

To implement this process, the framework for building and interpreting workflow approvals brings together these users:

- Application developers

  Application developers adapt applications for approval with minimal coding using a defined setup process. Making this possible is the approval workflow engine, which provides a common implementation that other applications can use. Application developers integrate their applications with the approval workflow engine framework using the Approval Transaction Registry page where they register an application with the engine and describe its components, event handler, and records. The register stores approval process IDs developers create for applications.

Note. PeopleSoft delivers the transaction registry for PeopleSoft Supplier Contracts, PeopleSoft Promotions Management, PeopleSoft Expenses, PeopleSoft Strategic Sourcing, PeopleSoft eProcurement, and PeopleSoft Services Procurement

After an end-user creates an application transaction and submits it for approval, the application hands the transaction over to the approval workflow engine that finds the appropriate approval process definition, and launches the approval workflow.

- Functional business analysts

  Functional business analysts design approval workflow for use with an application. This includes setting up stages, paths, steps, recipients, and notifications for each approval process ID. Analysts identify the application-supplied transaction definition on which to base approval process definitions. They use the Approval Process Definition page to define processes for approving transactions. These processes can be used again and again to guide requisitions through their approvals.

  Many businesses need different approval routings for different business units. To support such variation, you can have multiple approval process definitions to be configured for each application. In addition to process IDs, approval process definitions are keyed by setID and effective date. Business units can be mapped to setIDs according to customer-defined configuration.

- End users

  End users create transactions and then use an approval process with approvers and reviewers within an approval flow. Using this process, the different end users can approve or deny requests, monitor requisition statuses, and audit approvals.

Header- and Line-Level Approvals

Many PeopleSoft transactions have a top-level record (known as a header) with keys that uniquely identify a single transaction in an application. Then, these transaction will typically have other children records (line-level records) of this header record.

The approval workflow process uses an application's header keys to correlate approval processes and application transactions. For example, when you open an application transaction, the approval workflow engine enables you to submit the request for approval only if you haven't already submitted it. This check is possible because the system correlates the application header keys with the approval process instance keys.

When you need to track an approval status at a lower level within a transaction, an analyst can configure the approval process so that different line-items in the same request follow different routes. In such cases, the workflow approval engine splits the workflow into constituent line items, and enables analysts to configure the approval process so that different line items in the same request follow different routes. These lines of the workflow are still part of the same request, however, and should be tracked as such.

You can deny some lines of the requisition and approve others, making line-level approvals independent for each line. For example, a requisition can contain multiple lines, and you might want to use special approvers for certain catalog items, such as software or hardware. You can add specialized approvers to approve requisitions that are in their area of expertise.

An approval workflow might have mixed header and line-level approval routings. For example, department managers might exercise budgetary control over the request as a whole, while commodity approvers still examine only those line-items which fall within their expertise. Final approval requires both types of approvers to sign off on the requisition.

When a request is approved, the engine notifies the application, which then takes source end actions:

- End actions.

An approval of one transaction often leads to the creation of another transaction, or triggers another business process. The approval workflow engine supports this trigger by providing a call-back mechanism for event notification. For example, when a requisition is approved, it can be sourced—an action follows final approval, which is the end action.

- Line-level versus header-level end actions.

  Use line-level approvals to make it possible for action to be taken on different line items immediately upon their approval, without waiting for the approval of other line-items in the requisition. This means you can source line items as soon as they are approved.

  This is possible only if line-level approval routings are at the end of the process and require no further review. In this case, the application can act on the individual lines as they get approved. The approval workflow engine notifies the application of significant approval-related events.

Approval Flows

After an approval process is defined, validated, and made active, the system can submit an application's transactions for approval. Each PeopleSoft application typically has a top-level database record that distinguishes one transaction from the next. For instance, the eProcurement application's top-level record is named *REQ_HDR.*. These top-level records are called header records. When a transaction is submitted for approval, the approval workflow engine combines the approval process definition with the header record instance, and line records if line level approval is configured, to create a unique approval process instance. This approval process instance gets routed from approver to approver, as configured in the approval process definition.

Approvals use two levels of processing—header and line. Business analysts setup the approval process definition that determines the flow of the approval at both levels. The approval process consists of:

- Stages

  A stage is one part of an approval process that can contain multiple parallel paths but must be at the same header or line record level. The system executes stages in sequence where one must complete before the next one begins. A stage can be at either a header level or at a line level. Stages at a line level makes it possible for approvers to sign off separately on individual line items in a single requisition. The workflow engine sees each header and each line as individual pieces. A line is a child of the header. A header stage acts on the unique header while a line stage acts on each line. A stage consists of one or more paths.

- Paths

  A path contains a sequence of steps. Within a stage, paths execute in parallel. Path entry criteria determines whether or not a path executes for a given transaction or transaction line.

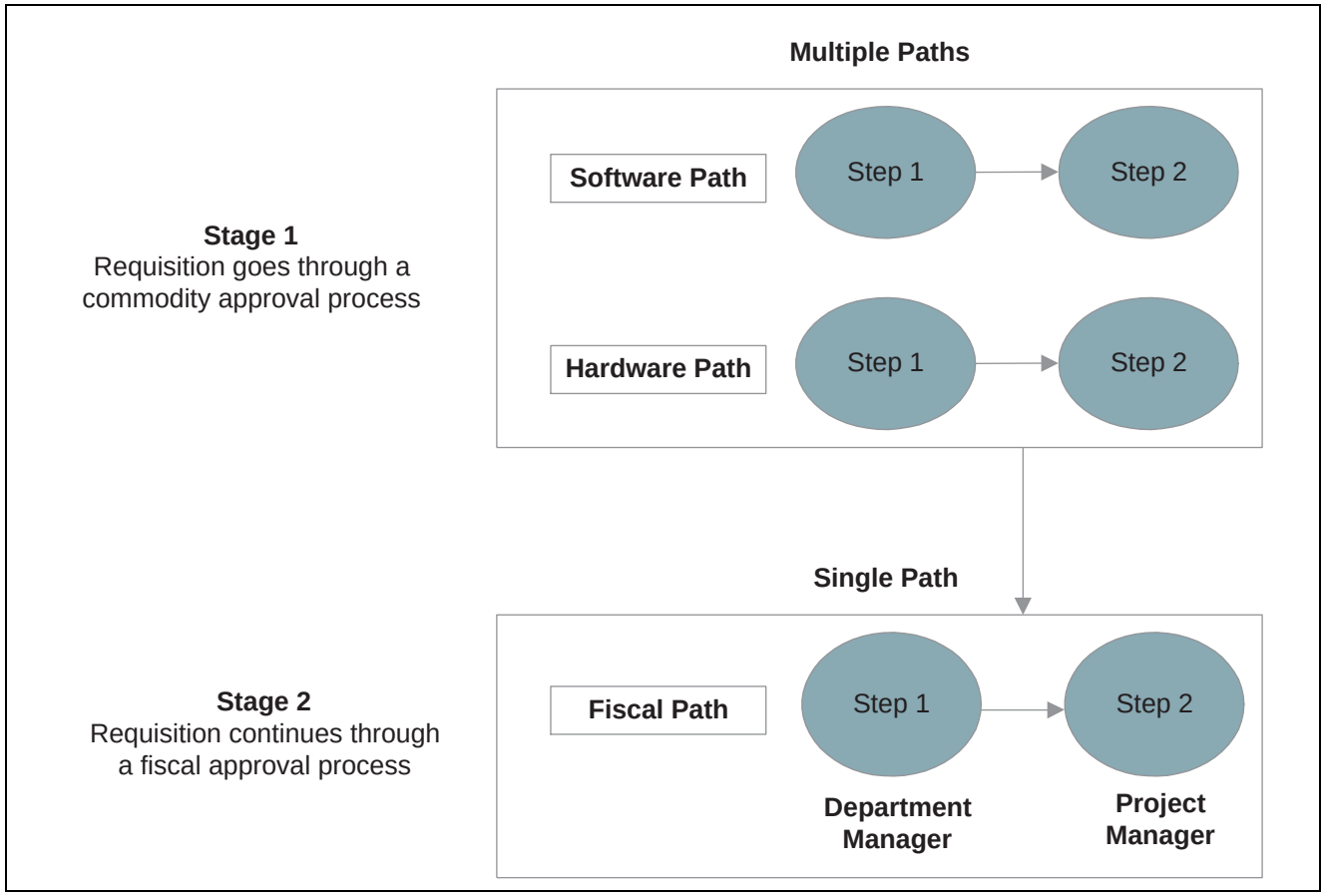
- Steps

  A step represents one or more approvers or reviewers. Steps within a path execute in sequence. Separate criteria for each step determines whether or not that step executes. Each step can also have a set of reviewers, who are notified about transactions pending approval by email, if configured, and/or through the Worklist. But, the workflow proceeds without waiting for reviewers to act.

  The system notifies approvers by using Worklist and/or email, if configured, of pending approval step which can require one, all, or a fixed number of approvers. You can specify approvers by roles, queries, fixed lists, or by using custom application classes. Once the required number of approvers have approved a step, the approval workflow advances to the next step. If there are no further steps, it advances to the next stage.

Note. While the configuration may require any number of approvers to approve a step before it advances, any single approver can deny. The moment an approver denies, that line or header stops routing further. If it is at the line level, other lines will continue approval routings. If the denial is at the header level, the approval process terminates, and the entire requisition is denied.

This diagram illustrates how the approval process uses stages, paths, and steps for routing approval:



The approval workflow

Approval Features

Using a combination of features, you can create rules for different types of approvals. This section discusses:

- Ad hoc approval
- Ad hoc review
- Self-approval
- Route to Requester
- Skip Prior Path
- Auto approval
- Alternate approvers
- Push back feature

- Approval comments

Ad Hoc Path Approval

During the approval process approvers can add other approvers or reviewers to the current or a later stage of the approval process. For example, if a buyer wants input from an inventory analyst, she can add the analyst as an approver. This is called ad hoc approval and only applies to the approval instance in which the addition occurs and does not affect the underlying process definition used for other requests.

You can insert ad hoc approvers and/or reviewers in serial or parallel with existing approvers. For serial approvals, each approval in the process is sequential. Users can add approvers and reviewers only after the currently pending step, or later. With parallel approvals, the sequence does not matter. Users can insert an ad hoc step in an ad hoc path in any currently pending or subsequent stage.

You can add ad hoc approvers, once the requisition is submitted. The approval workflow engine will launch the previewed approval process instance if requested by the application developer's code.

If you have an ad hoc approver user list defined in the transaction registry, only the users within that list can be added as an ad hoc approver/reviewer.

See Chapter 2, "Using Workflow and Managing Approvals," Defining User Lists, page 31.

Ad Hoc Review

Ad hoc reviewers are users that an approver or requester would like to review a transaction. Ad hoc reviewers are simply notified and provided with a link in a Worklist entry or email to the transaction, if the process is so configured.

Self-Approval

A requester can also be an approver. If requesters approve their own transactions, it's called self-approval. A check box setting enables self-approval. If enabled, the requester's approval is assumed, and the process continues; however, you can establish criteria that helps control the requester's approval authority. For example, you can place a limit on the dollar amount for the requester so that if the transaction is over that amount, the requester is not used as an approver.

If self-approval is not enabled, then the requester can't serve as an approver. If the requester appears as an approver for any step, they are blocked from acting. If, because of this, the number of approver available to act drops below the minimum, an error is generated. The process is then routed to the administrator.

If self-approval is enabled, then the self-approval criteria must be specified. Then, if the requester appears as an approver, the criteria is evaluated. If the criteria evaluates to true, then the requester's approval is assumed and the minimum approvers for that step decrements by one.

When a requester is an approver, you can configure the path to skip the steps in that path prior to the requester's step.

Self-approval is configured at the step level.

Route to Requester

Route to requester is a feature that informs the system that an approval should be sent to a requester under certain circumstances:

- If self-approval is set up, the criteria to trigger self-approval is not met, and route to requester is not selected, then the requester can't be included as part of the approval path.
- If route to requester is selected, and self-approval criteria is not met, the requester will be included as part of the approval path, and the system notifies them of the pending approval.

For example if a vice president orders items on behalf of a direct report at the supervisor level, the system will send a notification to the supervisor the order was made for. The supervisor remains part of the approval process.

Skip Prior Path

When skip prior to requester is enabled, the system begins the approval flow at whatever step in which the requester is an acknowledge approver.

For example, if a vice president orders supplies for herself, the system will skip application approval steps leading up to the step where the vice president is an acknowledged approver.

Auto Approval

When auto-approval is enabled, the system remembers an approver's action for that process at the header- or line-level, and applies the same action automatically for any subsequent appearance in the approval workflow routing. For example, if the approver approves line one, and the line appears again as a required approval for the specific approver, the approval is remembered for the line. This approval does not pertain to any other line, but header approvals do imply line approval for this feature.

Alternate Approvers

Alternate workflow approvers are those users who are assigned to receive emails and Worklist notifications for the primary approver when that approvers is not available. When you identify an alternate approver, you use a date range during which you want the alternate to fill in. The system determines if the alternate is in place for the date range.

Note. Alternate users are defined in the User Profile. Navigate to PeopleTools, Security, User Profiles, User Profile.

Push Back Feature

Push back takes a currently pending step out of pending status, and requeues the previous step to its approvers The meaning of push back is that the approver is questioning the prior step's approval, and is demanding a clarification. Push back is only possible within a path, so the first step of a path cannot push back.

Note. The push back feature ignores auto self-approval.

Approval Comments

Requesters can add comments to requisitions, and approvers can associate their comments with the approval process, rather than the request transaction directly. The approval workflow monitor provides a mechanism for associating comments with a particular approval process instance which, in turn, is tied to a particular application transaction. Approvers can view comments added by any approver, but cannot change any prior comments.

Understanding Approval Workflow Tasks

This section details the steps to implement and use approval workflow. It describes tasks that application developers, business analysts, and end users perform in conjunction with approval workflow.

To implement and use workflow:

1. Application developers register information with the approval workflow engine by using the Approval Transaction Registry page.

As part of defining the registry:

a. Application developers create a record and table in which to store cross-reference information and set up notification templates for events. This determines the pending approval workflow process and tells an application which transaction is being approved or denied.

b. Link the transaction component.

2. Functional business analysts define the approval process definition for an application transaction.

   Essentially, analysts determine the approval transaction registry entry on which the process definition is to be based and then define the details of the process. The approval process definition includes definitions of stages, paths, steps, and criteria.

3. Requesters submit a transaction for approval.

   This launches the approval process. The approval workflow engine reads the approval process definition and queues the transaction for approvers.

4. The system queues an approval task to an approver or reviewer using email and/or a Worklist entry.

   The URL encoded in the Worklist entry points to the corresponding approval component.

5. Approvers take actions on transactions.

   When an error or violation of criteria or rules occur during the approval process, the system notifies the administrator who interacts to resolve the issue.

   Note. The error conditions for static steps are no approvers or not enough approvers at a step.

6. Reviewers can view the transaction.

Pages Used to Define Approval Workflow Processes

Page Name	Object Name	Navigation	Usage
Approval Process Definition	SAC_AW_PRCS_MAIN	• Set Up Financials/Supply Chain, Common Definitions, Approvals, Approval Process • For PeopleSoft eProcurement, use eProcurement, Administer Procurement, Maintain Workflow, Approval Process Definition	Define workflow approval process stages.
Criteria Definition	SAC_CRITERIA	• Click the Alert Criteria link on the Approval Process Definition page. • Click the Criteria link from the Approval Process Definition page in the Path section. • Click the Criteria link from the Approval Process Definition page in the Step section.	Define criteria for workflow approvals.
Path	SAC_AW_PATH_SEC	Click the Path link on the Approval Process Definition page.	Set up workflow approval paths.
Step	SAC_AW_STEP_SEC	Click the Step Details link on the Approval Process Definition page.	Define steps for workflow approvals.
User List Definition	SAC_USER_LIST	• Set Up Financials/Supply Chain, Common Definitions, Approvals, User List • For PeopleSoft eProcurement, use eProcurement, Administer Procurement, Maintain Workflow, User List Definitions	Define a list of users for approvals.

Defining Approval Workflow Processes

To set up approval processes, use the Approval Process component.

Access the Approval Process Definition page.

Business analysts use this page to define an approval definition process. The process is made up of stages and their paths and steps. The approval steps that you place on the approval path represent the approval levels that are required for a transaction.

You can develop approval processes that:

- Meet organizational or tiered approval limits.
- Use alternate hierarchies, such as commodity approvers (procurement) and financial approvals (expenses) and so on.
- Use multiple parallel tracks, such as procurement and inventory approvals at once.
- Use staged tracks, such as first receiving commodity approval and afterward receiving financial approval.

Typical approval processes might include:

- Employees or supervisors who can approve purchases up to a given amount.
- Two different approvers for each step, where both approvers at a step must approve the request for it to advance to the next step.

Preview Use this link to view what an workflow instance would like if it were running.

Approval Process Builder This is a graphical tool to view each stage, path, and step of the approval process.

Note. When you are viewing the graphic tool in the Approval Process Builder page, if you elect to make changes the system will return you to the standard Approval Process Definition page.

Set ID Identify the set ID for the approval process.

See *PeopleSoft Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Application Designer*

Approval Process ID This is the Approval Process created in the Approval Transaction Registry.

See Chapter 2, "Using Workflow and Managing Approvals," Understanding the Approval Transaction Registry, page 20.

Effective Date Indicates the date on which this approval process became effective and ready for system use. This applies to approval processes for a particular approval process ID and setID and includes PeopleSoft functionality associated with effective dated entities. For instance, if multiple approval processes are active with the approval process ID, setID and effective date specification, then the system uses the latest active effective dated process.

Status Select the current state of this approval process. The values are:

Active: Indicates the approval process is available for use.

Inactive: Indicates the approval process is not available for use.

Admin Role (administrative role) Select the user list role used by workflow to route the transaction to all users filling that role in case of an error during approval processing.

Note. The error conditions are no approvers or not enough approvers.

See Chapter 2, "Using Workflow and Managing Approvals," Defining User Lists, page 31.

Alert Criteria Click to access the Criteria Definition page where you can define user and field criteria along with monetary and application class criteria for this stage. This criteria can be evaluated by applications to highlight conditions of

a transaction to be approved. For example, a one time shipping address used only on this requisition.

See Chapter 2, "Using Workflow and Managing Approvals," Defining Criteria for Approval Processes, page 15.

Take action on line completion

Select to source individual requisition lines after each line has completed the approval process. This setting applies to approval processes that have a line-level stage at the end of the process.

The system supports line-by-line sourcing only when the last stage is at the line level. This assumes that the line-level stage is the last stage of the approval process.

Note. If the check box is clear, all lines must be approved before you can source the requisition.

User Auto Approval

Select to enable the system to remember an approver's action for this process. The next time this approval process is presented to the approver, the system automatically applies the approvers selections. The automatic application of steps in the process is left in place until you clear the User Auto Approval check box.

This applies to the specific line or header the approver had previously approved in this process only. A header approval implies line approvals for all lines.

Route to Requester

Route to Requestor works in conjunction with the self-approval flag. If the approver failed to meet the self-approval criteria, the approval could still be routed if this check box is enabled. If the check box is not enabled and the approver fails to meet the self-approval criteria, then the system routes the approval to the administrator.

Stage

Enter the sequence in which you want this stage of the approval acted upon. You can also enter a description for the stage in the Description field.

A stage is a logical grouping within a process such as commodity or fiscal approval. You can define a single stage or use multiple stages, in which case the stages execute in strict sequence. Before the second stage starts, the first stage must end.

Each stage must be either at the header level or at the line level. This is the additional constraint on header- versus line-level approval configurations. A header-level stage acts on the single header. A line-level stage acts (simultaneously) on all the lines under the header.

Level

Select the level at which you want approvals to be processed. All paths within the stage are at the same level as the stage itself. Available values are:

Header: At a header-level stage, the system enables the same request (header) to be routed to two or more parallel paths.

Line: Line-level stages can have multiple paths with selection criteria that distinguish the line-item's content, such as software line items going to software approvers. These allow each line to route differently, if appropriate.

See Chapter 2, "Using Workflow and Managing Approvals," Understanding the Approval Workflow Engine, page 3.

Approval Path Enter a value that identifies this path. A path is a sequence of steps. Examples of paths might include a hardware path where approval steps are defined for when hardware items are in a requisition. Another example could be a department path where a requisition requires approval up a department hierarchy.

Within a stage, paths execute in parallel with each path at the level from the stage to which it belongs. Path-entry criteria determines whether a path executes for a transaction header or line. For example, for a line-level stage, each line in the transaction is presented to each path; the path criteria decides whether or not that path is triggered for that line. If the system evaluates the criteria you enter for a path to be false for a header or line, then it bypasses the path for that header or line.

When a stage becomes active (approvers in the stage get pending work), all its contained paths become active simultaneously. All the paths of a stage queue work to approvers in parallel. The stage is complete only when all paths in it complete.

Source Select the method by which steps are instantiated during the approval process. Values are:

Static: Select this source to indicate that you want the system to use the individual user-defined steps when it processes an approval.

Dynamic: A dynamic path definition contains only one step. When begun, the single step definition could yield any number of instances in sequence.

When using the *Dynamic* source, the system uses the user list on the step definition to initialize the steps in the path. The single step definition is repeatedly run, until the step's user list returns no more approvers. All these instances are queued in sequence.

Note. User lists are associated with roles, queries, and classes using the User List Definition page. To access the page, select Set Up Financials/Supply Chain, Common Definitions, Approvals, User List Definition.

See Chapter 2, "Using Workflow and Managing Approvals," Defining User Lists, page 31.

Path Details Click to access the Path page where you can define path criteria and escalation parameters, such as whether or not to notify the requester's supervisor.

Criteria Click to access the path's Criteria Definition page where you can define field criteria along with monetary and application class criteria. You can define criteria for the approval process using most records and fields in the database.

Step Number Enter the sequence in which you want this step performed during the approval process.

Approver User List Select the approver list you want to use for this step. A user list is an entity which groups users in the system. Roles, queries and application classes are examples of user lists. The system then uses the list and its users to run automated business processes. The list defines the user sources who can be used in approval steps.

When configuring approval workflows, business analysts use user lists to assign approval tasks to the approvers and reviewers who are to act on the request being considered for approval.

The approval engine has two types of contextual information available to the user list definition: the previous approvers in the path, and the transaction (header or line) keys. The previous approver of the first step of a path is always the requester, regardless of which stage the path belongs to. In the case of SQL queries, the context is provided by bind values. The bind values are the prior approver (one per call, in case there are multiple prior approvers), and the keys of the header record. The key values are provided in the order in which they are defined in the corresponding record object.

See Chapter 2, "Using Workflow and Managing Approvals," Defining User Lists, page 31.

Step Details Click to access the Step page where you can define approver requirements, self-approval details, and reviewers.

Criteria Click to access the step's Criteria Definition page where you can define field criteria along with monetary and application class criteria. You can define criteria for the approval process using most records and fields in the database.

Defining Alert Criteria

Access the Criteria Definition page using the Alert Criteria link.

This page works similarly to the other Criteria Definition pages used for paths and steps, with two striking differences:

- The description field is the actual alert text that is then displayed on the approval page.
- The criteria determines if an alert should appear on the approval page, as opposed to routing a line or header for approval.

See Also

Chapter 2, "Using Workflow and Managing Approvals," Defining Criteria for Approval Processes, page 15

Defining Criteria for Approval Processes

Access the Criteria Definition page.

Use this page to define the different types of criteria you want to apply to a workflow approval process. You can create definitions consisting of a field with a logical operator and a value or definitions consisting of an application class that takes in transaction data to process the approval.

Criteria is an entity that evaluates to true or false. It programs the approval workflow engine, using transaction-specific information to change, for example, routing paths. In order to set the context for the criteria, the engine provides the transaction keys as bind values.

Criteria Type There are three different types of criteria you can enter:

- The system will only follow paths that evaluate as true. *Always True* informs the system to trigger this workflow approval process. No criteria is needed.

- With the criteria type *Application Class* you define which specific application class the system uses to determine if the workflow approval task evaluates as true.

  Note. Use the *Application Class* criteria type when the user entered criteria does not contain the necessary level of detail.

- Use the criteria type of *User Entered Criteria* to enter all record and field combinations either value or monetary based, that will trigger the workflow to evaluate as true.

All Criteria Needed to Satisfy This check box indicates that all criteria defined on the Criteria Definition page must be met in order to trigger the workflow to evaluate as true.

User Entered Criteria

Use this section to define additional criteria for the approval.

Description Enter purpose of the alert.

For example, if you are using a one time ship to address, you create a description that indicates that a one time ship address is attached to the requisition.

Field Criteria

Use this section to select a record and field on which to control and filter ranges of data or types of data placed in the file you want to use in the approval process.

Record Name Select a record that you want to use in defining approval criteria.

For example, if you were indicating a one time address you would identify the *PO_ADDR_REQ_VW* as the record.

Field Name Select a field you want to use to define approval criteria. The values you define in the remaining field criteria grid are those that are used in determining the approval criteria.

Criteria Operator Determines the action the system applies to the criteria you enter in the Value fields.

These operators are available:

- *Between:*Use only values between the two values you enter as criteria.
- *Equals:* Use only values equal to the entered criteria.
- *Greater Than:*Use values equal to or greater than the entered criteria.

  Is Blank
- *Is Not Blank*
- *Less Than:*Use any record value that is less than the value entered in the Operator Criteria field.
- *Not Equal To:*Use any record value that is greater than or less than the entered criteria.

Value Use the two Value fields to define a range upon which you want the operator criteria to evaluate. The second value is only used when the Criteria Operator evaluates using *Between.*

Monetary Criteria

Use this section to establish approval criteria for requisition amounts. The system uses the values you define to determine the routing for approving the requisition. When the system evaluates the criteria for an approval process or a step or path within the process, it uses monetary values you define in this section.

The system uses values from fields in this section in conjunction with the Operator field to determine whether to run a step.

Amount Record Select the record name to be used when comparing the requisition to the minimum amount required to trigger the step.

Note. If this approval process ID is used to trigger workflow for changes in amounts within requisitions, you need to use *PV_CHGRST_AMTVW.*

Amount Field Select the field within the amount record to be used when comparing the requisition to the minimum amount required to trigger the step. The system uses the value you select to evaluate the Amount field.

Currency Field Select the currency field that corresponds to the currency code you select in the Currency Code field.

Operator Select a value that determines how the system processes the values in the Amount fields. Values include *Between, Greater Than,* and *Less Than.*

Amount Use the Amount fields to define an amount range for use with the Operator field.

In the first field, enter the minimum amount required on the requisition in order to trigger the step. The system identifies all lines in the requisition that meet the criteria defined in the Amount Record and Approval Field fields. The amounts on these lines are totaled based on the amount record and amount field specified. If the requisition total is higher than this minimum amount, the criteria is met. If no amount is specified, zero is considered the minimum.

Note. If you use the Criteria Operator with a value of *Between*, a second Amount field becomes active.

Currency Code Select the monetary unit you want to use for the approval.

Rate Type Select how the system arrives at the currency value, such as the current rate or a financial rate.

Application Class Criteria

Use this section to assign application packages as criteria for the approval process definition. When you define a class, the system uses it along with other criteria you enter to process the approval.

Root Package ID Select the primary application package. This is the parent class for other packages or for child application classes.

Application Class Path Select a path that describes a specific class within the root package.

Defining Paths for Approval Process

Access the Path page.

Use this page to set up additional parameters that determine how the system processes an approval path. Use the escalations feature to define time elements for when an approver takes too long to approve or deny a pending request.

Approval Path Displays the path name that you are creating or updating. The path provides the sequence of approvers of a request, usually from a single reporting (or other) hierarchy.

Criteria Click to access the Criteria Definition page where you can define user and field criteria along with monetary and application class criteria.

Step Source *Static:* Select this source to indicate that you want the system to use the individual user-defined steps when it processes an approval.

Dynamic: A dynamic path definition contains only one step. When begun, the single step definition could yield any number of instances in sequence.

When using the *Dynamic* source, the system uses the user list on the step definition to initialize the steps in the path. The single step definition is repeatedly run, until the step's user list returns no more approvers. All these instances are queued in sequence.

See Chapter 2, "Using Workflow and Managing Approvals," Defining User Lists, page 31.

Skip Prior Steps for Requester Select this indicates that if one of the approvers in this path is also the requester, then this option instructs the system to skip all steps in this path prior to that approver's step.

Options *Advanced Approval:* Skip the current approver.

Notify: Sends an email, or whatever notification is defined in the transaction registry, to the individual.

Reassign: Reassigns to an operator ID or a user list.

Note. If you select *Advanced Approval* and defined a User List a notification is sent to the user list members.

See Chapter 2, "Using Workflow and Managing Approvals," Defining User Lists, page 31.

Number of Days Enter the number of days a transaction can remain at one workflow step before being escalated. This is the length of time an approver has to do something such as approve or deny a transaction.

Number of Hours Enter the number of hours a transaction can remain at one workflow step before being escalated. This field is combined with number of days to determine the total time an approver has to take action on an approval request.

User List Select the list of users the workflow should be routed to.

See Chapter 2, "Using Workflow and Managing Approvals," Defining User Lists, page 31.

Reassign If you have selected *Reassign* as the option, you can enter a user name or a specific user list.

Note. A user list will reassign to the first user in the list that does not match the current user.

See Chapter 2, "Using Workflow and Managing Approvals," Defining User Lists, page 31.

Defining Steps for Approval Process

Access the Step page to set up additional parameters for the step definition.

Step Number Enter the number for this step. It's the sequence in which an approval is routed. Each step typically represents a routing to an approver. However, it is possible to route to multiple approvers or reviewers in a step as well.

Criteria Click to access the Criteria Definition page where you can define field criteria along with monetary and application class criteria.

Approver User List Select the type of approver you want to use for this step based on the user list.

See Chapter 2, "Using Workflow and Managing Approvals," Defining User Lists, page 31.

Approver Role Name In addition to a User List, a role can be added to check for additional authorization checking. Select a role that specifies the authority that a user has. The approval workflow engine filters approvers returned by the user list for this role. It also enforces the role at the time the approver acts. If the role assignment changes, such as the approver is no longer in the role, the approver is blocked from acting on the requisition.

All Approvers Required Select to indicate that all approvers at this step are required to approve the requisition at this step. You can select to have all approvers or some approvers approve the requisition at this step.

Some Approvers Required Select to indicate that it's not required for all approvers to sign off on a requisition. If you select this option, you can define the number of approvers required in the Number of Approvers Needed field.

Number of Approvers Needed Enter the minimum number of approvers you want to sign off for a requisition at this step. When an approval process is launched and this number can't be met, the system notifies the approval *Admin Rolename*.

Self Approval Select to indicate that requesters can also approve their own requisition. This only applies if the requester also appears as an approver in the step. You can establish criteria that controls the requester's approval authority by using the Self-Approval Criteria link. If the associated criteria evaluate to true, then self-approval is acceptable. For example, you can place a limit on the dollar amount for the requester so that if the transaction is over that amount, the requester is not used as an approver.

If you select self-approval and the criteria is not met, the approval workflow engine requires that there be at least one more step after this one in the path. This does not apply to ad hoc steps. Clearing the check box means that self-approval is never acceptable.

Note. If the criteria is not met, and there is no later step, the system inserts an additional step. This is then routed to the administrator.

Self-Approval Criteria Click to access the Criteria Definition page where you can set up self-approval criteria for a user, including field criteria and monetary and application class criteria.

Reviewer User List Select the type of reviewer you want to use for this step. Use a user list to map users to certain functional roles. The system then uses the list and its users to run automated business processes. The list defines the user sources who can be used in approval and review steps.

See Chapter 2, "Using Workflow and Managing Approvals," Defining User Lists, page 31.

See Also

Chapter 2, "Using Workflow and Managing Approvals," Approval Features, page 7

PeopleSoft Enterprise eProcurement 8.9 PeopleBook, "Determining eProcurement Technical Implementation Options," Maintaining System Users and Roles

"User List Roles," *PeopleSoft Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Workflow*

Defining the Approval Transaction Registry

This section provides an overview on the approval transaction registry, prerequisites, and discusses how to register approval transactions.

Understanding the Approval Transaction Registry

The approval transaction registry is the interface application developers use to register an application with the approval workflow engine. Transactions that require approvals are candidates for being linked to approval workflow engine. You use the Approval Transaction Registry page to link the components, event handler, records, and classes that you created into the approval process for an application transaction, such as a requisition or purchase order. Application developers register the main records and components that make up the transaction, then functional business analysts select the approval transaction on which to base the approval process definition.

Note. Any PeopleSoft delivered approvals will already have the Approval Transaction Registry populated. No additional configuration will typically be needed.

Prerequisites

Before defining the transaction registry:

1. Create a Transaction Handler Application Class which extends an approved event handler class delivered by approval workflow.
2. Create notification templates for the events to include approval and denial for headers and for line levels.
3. Create transaction data sources, as needed.

4. Create views on transaction tables that will serve as criteria sources.
5. Create view to serve as source for ad hoc users.
6. Create view to serve as source for approver contact information.

Pages Used to Define the Approval Transaction Registry

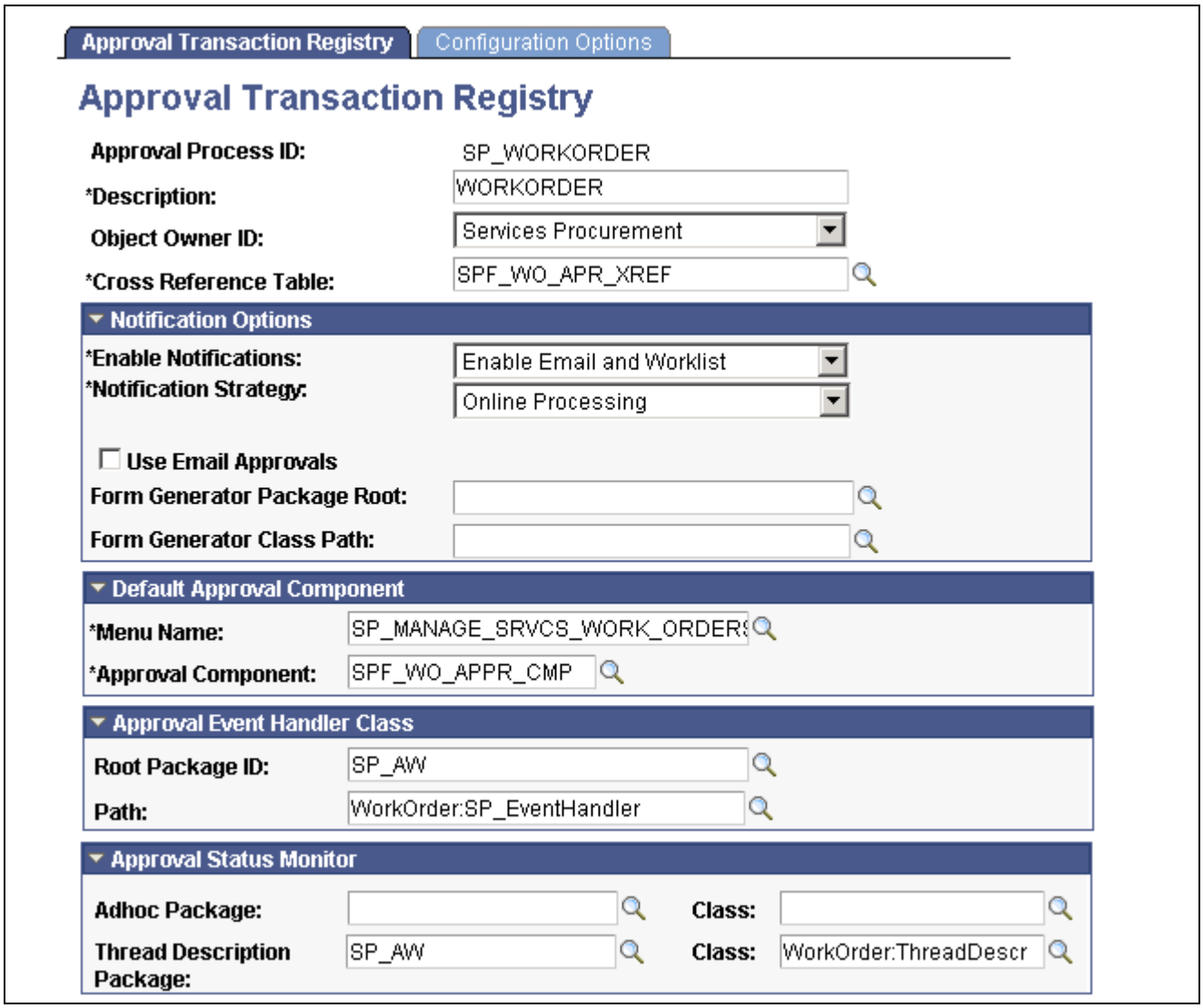
Page Name	Object Name	Navigation	Usage
Approval Transaction Registry	SAC_AW_TXN	• Set Up Financials/Supply Chain, Common Definitions, Approvals, Approval Transaction Registry • For PeopleSoft eProcurement, use eProcurement, Administer Procurement, Maintain Workflow, Approval Transaction Registry	Register the approval transaction. The transaction definition is the metadata that describes the transaction make up to the approval workflow engine.
Configuration Options	SAC_AW_TXN_NOTIFY	• Set Up Financials/Supply Chain, Common Definitions, Approvals, Approval Transaction Registry, Configuration Options • For PeopleSoft eProcurement, use eProcurement, Administer Procurement, Maintain Workflow, Approval Transaction Registry, Configuration Options.	Use the Configuration Options page to configure how the system uses the particular implementation of approval triggers.

See Also

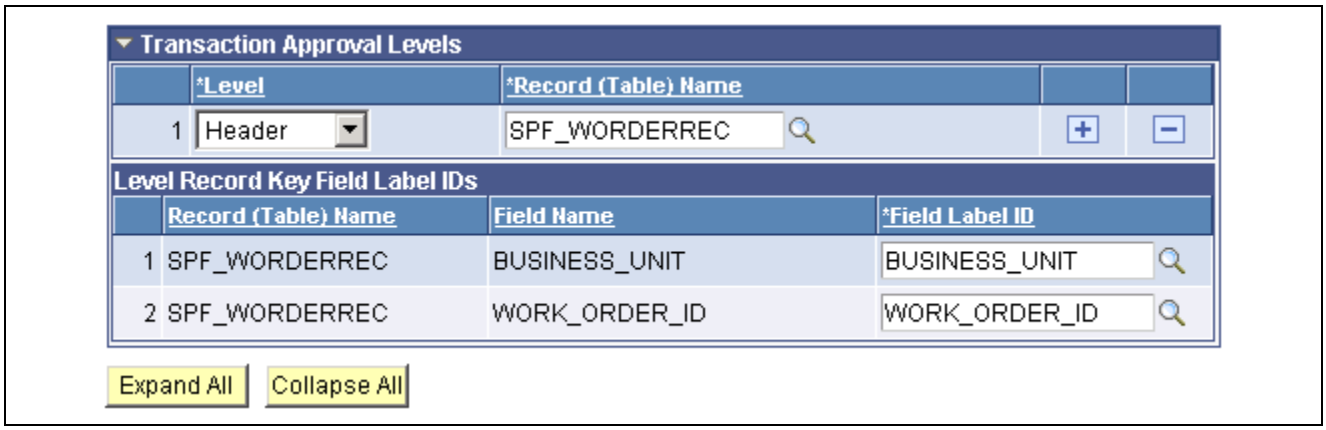
PeopleSoft Enterprise PeopleTools 8.46 PeopleBook: PeopleCode Developers Guide

Registering the Approval Transaction

Access the Approval Transaction Registry page.



Transaction Registry (1 of 2)



Transaction Registry (2 of 2)

Application developers use this page to register a PeopleSoft application, such as eProcurement or Service Procurement, with the approval workflow engine. Using the page, you can define how the system interacts with portions of the application that you have defined for approvals. The transaction definition is the metadata which describes the transaction make up to the workflow approval engine. In some cases, you might add a transaction to enhance an existing transaction or make changes to a transaction.

Use this page to define:

- Worklist approvals.
- Approval event handler class.
- Transaction approval levels.
- Email notifications.
- Ad hoc approver class logic.

Approval Process ID Enter a name the system uses to track this approval workflow process for a transaction. You can also enter a description for the approval process.

Object Owner ID Select the PeopleSoft application to which this object belongs.

Cross Reference Table Select the table used to manages application specific transaction records and associate them with the approval process run time instances. Each time a request launches an approval process, the system tracks the process by the header and line-level records of the application. To relate the approval process instance to the transaction instance, the cross-reference table holds the correspondence.

For a given application transaction record, this cross-reference information helps you determine the pending approval workflow process and to define to the application which transaction is being approved or denied.

Application developers must create a record containing the applications keys, and include an approval workflow engine-supplied subrecord. Developers must also build the underlying table.

Default Notification Options

Identify whether you will be using email or worklist notificatication, or both.

Enable Notifications Determine what type of notifications your company will use. The options include:

- *Disable Email and Worklist*
- *Email Notification Only*
- *Enable Email and Worklist*
- *Worklist Notification Only*

Notification Strategy It allows the email to be processed immediately*(Online Processing)*or offline*(Offline Processing)* through NEM (Notification and Escalation Manager.)

Use Email Approvals Defines that you are going to use email approvals with workflow.

From Generator Package Root This package root reads the threads provided by the Form Generator Class, and creates a form from an existing email collaboration definition.

From Generator Class Path Calls the From Generator Class which receives a list of threads to be approved and a language code. This class returns a runtime class, which will add the appropriate recipients and send the emails.

Default Approval Component

Identifies the default component that users should go to when selecting a worklist entry.

Menu Name Select the menu name that contains the component you want to register for the Worklist.

Approval Component Select the component on which the approval is going to be based.

Approval Event Handler Class

Use this section to define the application class used to monitor events for this transaction. Each time an event occurs, the approval workflow engine notifies the application. For applications to receive the notifications, application developers must extend the event handler class, ApprovalEventHandler.

When a transaction results in an action from the approval workflow engine, the event handler class you specify determines how to proceed with the transaction.

The event handler base class defines the handler methods that you can override by extending classes. The extending class must have a no-argument constructor, since the system instantiates the class with no arguments.

This table explains the various event handler methods for which the system passes arguments to provide the specific context for each event, and gives examples of how an application, in this case PeopleSoft eProcurement, may act:

Event	Parameters	Possible Application Actions
PROCESS_ LAUNCHED	1. Header record 2. Approval Process Instance	• Disable edits of the application transaction. • Display status information.
HEADER_DENIED	Header record	• Delete transaction. • Disable resubmission. • Log the event on the transaction, possibly highlighting previous denial if the system allows resubmission.
LINE_DENIED	Line-level record	Deduct the line amount from the header, and delete or otherwise deactivate the line item.
HEADER_ APPROVED	Header record	• Source the transaction if it's a requisition. • Reimburse the employee if it's an expense report.
LINE_APPROVED	Line level record	Source the line item if it's configured for sourcing.

Event	Parameters	Possible Application Actions
PROCESS_ TERMINATED	Header record	Log the event on the application, possibly highlighting changes since the previous submission. This might be useful for approvers who acted on the previous submission of this request.
ALL_LINES_ PROCESSED	Header record	**Note.** The system calls this method only if the last stage is at the line-level, and the analyst has configured the process to trigger LINE_APPROVED end calls as individual lines are approved. The action the system takes depends on how the application developer defines the line sourcing. If the lines are sourced as they are approved, then nothing has to be done when all the lines are processed. This event is distinct from HEADER_APPROVED, and having a distinct notification simplifies the process.

Root Package ID Select the parent application class through which events are exposed. This defines the action to take based on events.

Path Select a path that uses a specific class within the root package.

See *PeopleSoft Enterprise PeopleTools 8.46 PeopleBook: PeopleCode Developers Guide*

Approval Status Monitor

Use this section to control how the system processes ad hoc approvers. any approver can add or remove ad hoc approvers.

Adhoc Package Select the ad hoc application class package that yo want to use for ad hoc approvals.

Adhoc Class Select the ad hoc application class path. Adding approvers and reviewers is handled by the class you define here. If no class is specified, then the system default class is used. The default class allows s to be added. If the transaction has further restrictions an application developer needs to create a class that will be defined here.

Thread Description Package The package here defines how the transaction details are displayed in the system in the status monitor. Behind the scene approvals are define with a sequence number. this allows for a user friends display.

Thread Class Enter the specific class within the thread description package that sets the display details.

Transaction Approval Levels

Use this section to define if the transaction is to be approved at the header or line level and what level the application supports.

Header or Line Level Define what levels are enabled by the application for approvals. The first row will always be the header level. If you select the header level

Record (Table) Name Select the database table that represents this transaction level.

Defining Configuration Options for Transaction Registry

Access the Configuration Options page.

Use this section to select and define elements that determine what triggers a notification, who receives the notification, and the content of the notification. Notifications are mapped to work with the approval transaction registry and include menus and components and SQL definitions. The events for which the system sends notifications include:

- Launch of the approval process on a transaction.
- Queue of approval step to an approver.
- Queue of a review step to a reviewer.
- Denial of a line or header.
- Approval of a line or header.
- Completion of the approval process.

Recipients of notifications include requesters, the approvers, and reviewers, who can receive their notifications through either Worklist entries or email. When using email notifications, business analysts must create email templates.

Ad Hoc Approver Options

Use the AdHoc Approver Options section to define the view approvers see, and a list of available approvers to use when adding approvers during the approval process.

Approver User Info View Provides details about which view a user seens when using the approval monitor.

Note. Data in this view dictates what is displayed in the approver links.

Ad Hoc User List This is a filter used to display only a list of users who can be ad hoc approvers.

Notification Options

Use the Notification Options section to further define the email notification process.

Email Approval User List Specify exactly which users should be allowed to do their approval via email.

Note. If the user receiving the notification also falls into the email approval user list, then they receive an email approval rather than a standard email notification.

Delivery Method Define whether you wish the users to receive their email approvals as text within the email, or as attachments.

Perform Sent-To Security Check Selecting this check box informs the system that you want it to verify the security of the person the notification is sent to.

Note. This security check is only performed on new approvals.

Events

Use the events section to define event parameters to trigger workflow notification.

Level Select the level at which you want a notification sent for an event. For each of these events to be notified, you must select the level of the transaction, either *Header* or *Line*.

Event Select the event for which you want to send a notification. By default values, the approver is always notified of an event and when an error occurs the system notifies the requester and the system administrator.

Event values include:

Ad Hoc Delete

Ad Hoc Insert

Hold Step

Locked Out

On Error

On Escalate

On Final Approval

On Final Denial

On Process Launch

On Reactivate

On Reassign

On Step Complete

On Terminate

Processing Complete

Route for Approval

Route for Review

Note. *Lock Out, On Error, On Escalate, On Process Launch, On Terminate,* and *Processing Complete* are for header level only.

Menu Name Select the menu name that contains the component you want the notification recipient to link to. This identifies where the person should go upon notification. If you do not enter values, the recipient is sent to the same menu and component that is defined for the Worklist Approval component.

Approval Component Select the component you want to make available to the notification recipient.

Page Name The page defined is the page approvers are redirected to from the URL sent within the email notification.

Menu Action This is the action of the page users see when directed to the page from the URL sent within the email notification.

SQL Object Identifier (structured query language object identifier) Select the SQL definition identifier you want to use to get content for the email. The SQL must accept bind inputs equal to the number of keys at the notification level. For example, header or line keys.

Event Notifications

Use the Notification section to define who will be notified and how the notification takes place.

Participant Define the user who is notified when this event takes place.

- *Admin*
- *Approver*
- *Dynamic*
- *Requester*
- *Reviewers*
- *User List*

Channel Defines how the participant will be notified.

- *Both*
- *Email*
- *None*
- *User*
- *Worklist*

Note. Routing preferences can also be set up in PeopleTools, Security, User Profiles, Workflow. From there you have two options. You can select *Worklist User* and/or *Email User.*

User List Select either *Dynamic* or *User List* as the Participant. The option becomes active when you select one of these values.

Template Name Select the generic template you want to use for the email content of this notification. You define the contents of the email using the Generic Template page. To access the page, select Set Up Financials/Supply Chain, Common Definitions, Approvals, Generic Templates.

Defining Notification Templates for Approval Workflow

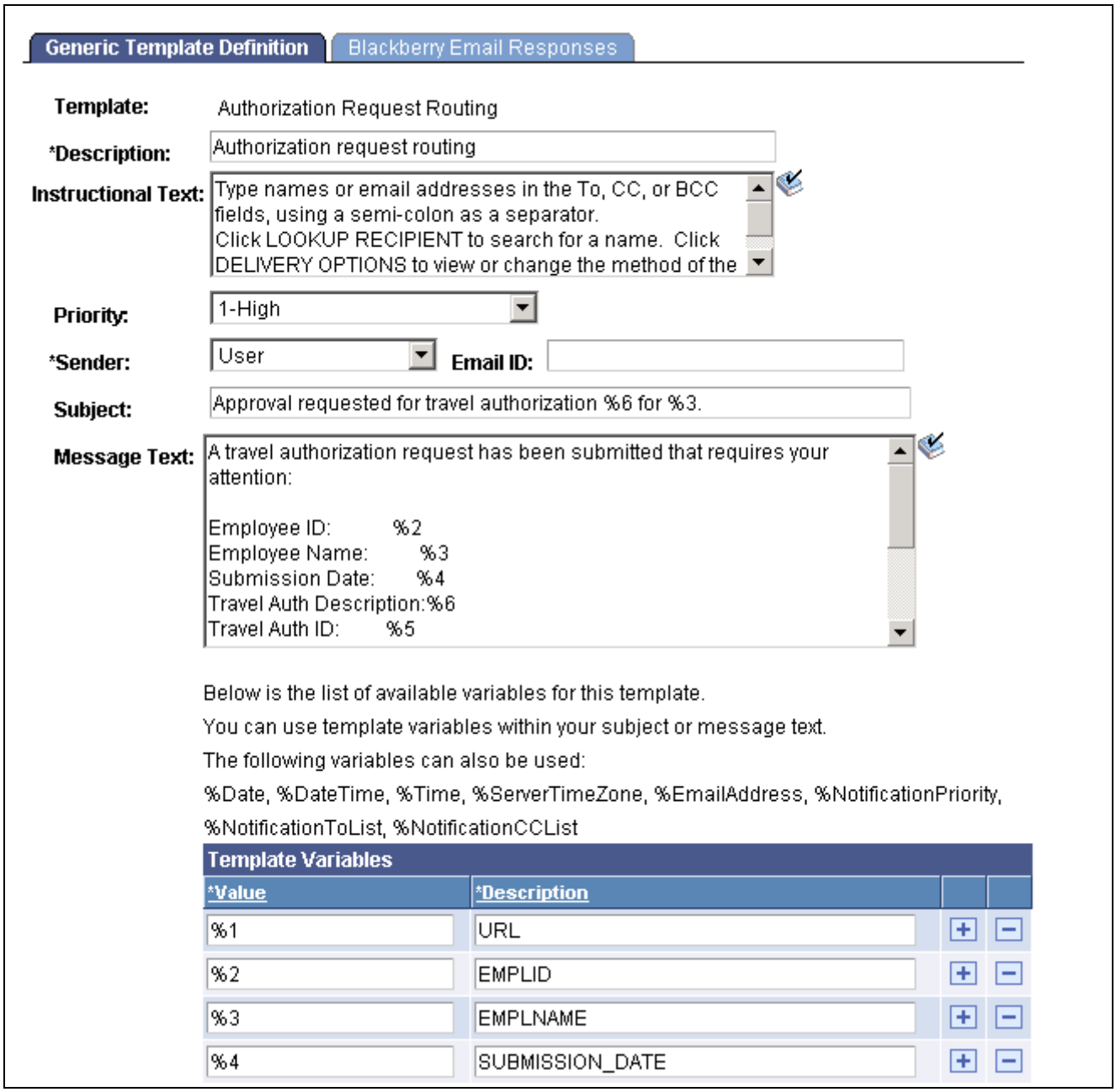
This section discusses how to enter generic template definitions.

Pages Used to Define Notification Templates for Approval Workflow

Page Name	Object Name	Navigation	Usage
Generic Template Definition	WL_TEMPLATE_GEN	• Set Up Financials/Supply Chain, Common Definitions, Approvals, Generic Templates • For PeopleSoft eProcurement, use eProcurement, Administer Procurement, Maintain Workflow, Email Notification Templates	Enter generic template definitions.
URL Maintenance	URL_TABLE	PeopleTools, Utilities, Administration, URLs	Use this page to identify the URL that the notification process places within the email. This URL is then used to navigate the user back into their system to perform the required task. **Note.** An example of the format to use is *http://servername/psp/employeeportaldomain/*.

Entering Generic Template Definitions

Access the Generic Template Definition page.



Generic Templates page

You use generic templates to establish common formats for ad hoc notifications.

For approvals, the first bind variable is used to store the URL displayed in the email.

See Also

"Using Notification Templates,"*PeopleSoft Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Workflow*

Defining User Lists

This section discusses how to create user list definitions.

Page Used to Create User List Definitions

Page Name	Object Name	Navigation	Usage
User List Definition	SAC_USER_LIST	• Set Up Financials/Supply Chain, Common Definitions, Approvals, User List • For PeopleSoft eProcurement, use eProcurement, Administer Procurement, Maintain Workflow, User List Definition	Create and maintain user-list definitions.

Defining User Lists

Access the User List Definition page.

Use this page to define user sources for use with steps in the approval process. PeopleSoft delivers a set of default user list roles corresponding to the roles within an organization.

When you select a user list source type, you must also select a corresponding value. You can add a new user list or change a current list.

Note. You can only select one user list source for a user list.

Role Select to use a role as the source for this user list. A role is a list of users who perform the same type of work, such as buyers or managers. Each role has a set of parameters that determine the limits what the roles can and cannot do in the organization and in the workflow process.

Note. The SQL definition, Query, and Application Class user list sources are dynamic, and can use input values to help identify users.

SQL Definition (structured query language definition) Select to use an SQL definition as the source for this user list.

Query Select to use a query as the source for this user list. When a source is defined as a query, the system determines who should receive a work item based on the field values on the page that triggers the routing.

Application Class Select to use an application class as the source for this user list.

When you select to you an application class, the system passes in the originator of the transaction and then determines the approver for that originator. For subsequent approval steps, the system passes in the approver from the previous step.

Include Users as Input When you select the check box, the system uses the originator of a transaction as the first step in each path. For subsequent steps in each path, the system uses the approver from the previous step.

Transaction Keys as Input Select to have the system base the approval routing on transaction keys. Transaction keys are key fields in a database table. System actions depend on the approval level at which a user list is being used. If the approval is at the header level, the system uses transaction record keys from the header record.

See Also

PeopleTools PeopleBook: PeopleCode Developers Guide

Using Dynamic Approvals

This section provides an overview of dynamic approvals, discusses how to:

- Define user lists for dynamic authorizations.
- Set up approval authorizations.
- Define dynamic approval paths.

Understanding Dynamic Paths

To do dynamic approvals, you create one approval step that is used to determine a list of approvers without setting up every step individually within the path.

Workflow processes are defined in stages, paths, and steps. The system looks at the stage to determine if the trigger for the workflow is recognized at the header or line level. Within each stage, there is a minimum requirement of one path. The path contains steps, which define the workflow triggers and the action to take if the criteria is met. Without dynamic paths, the administrator creates a step for every possible approver. With dynamic workflow, the administrator creates a single path where the system users a user list for the approval hierarchy.

Note. When self-approval is utilized, if the requisition creator is on the list of authorize approvers, that is counted as one approval.

See Also

Chapter 2, “Using Workflow and Managing Approvals,” Defining User Lists, page 31

Understanding Dynamic Approval Authorizations

PeopleSoft applications use workflow to configure approval paths in two manners. The first configuration is to define every approval in step-by-step fashion. The second manner is to create dynamic approvals. The dynamic approvals allow you to create a single step that systematically identifies every potential approver, searches to find out if that approver has enough authority to complete the approval, and creates a visual path for users to view of all necessary approvers in the process. You can configure a dynamic path allowing supervisory roles to approve or deny a transaction, and stop the approval path when the system has determined that all criteria have been satisfied. The administrator creates a user list that the system uses to select the appropriate supervisory approvers for a transaction and then check for authorization. The dynamic path takes the prior approver into consideration.

To configure the dynamic approval authorization, the administrator must:

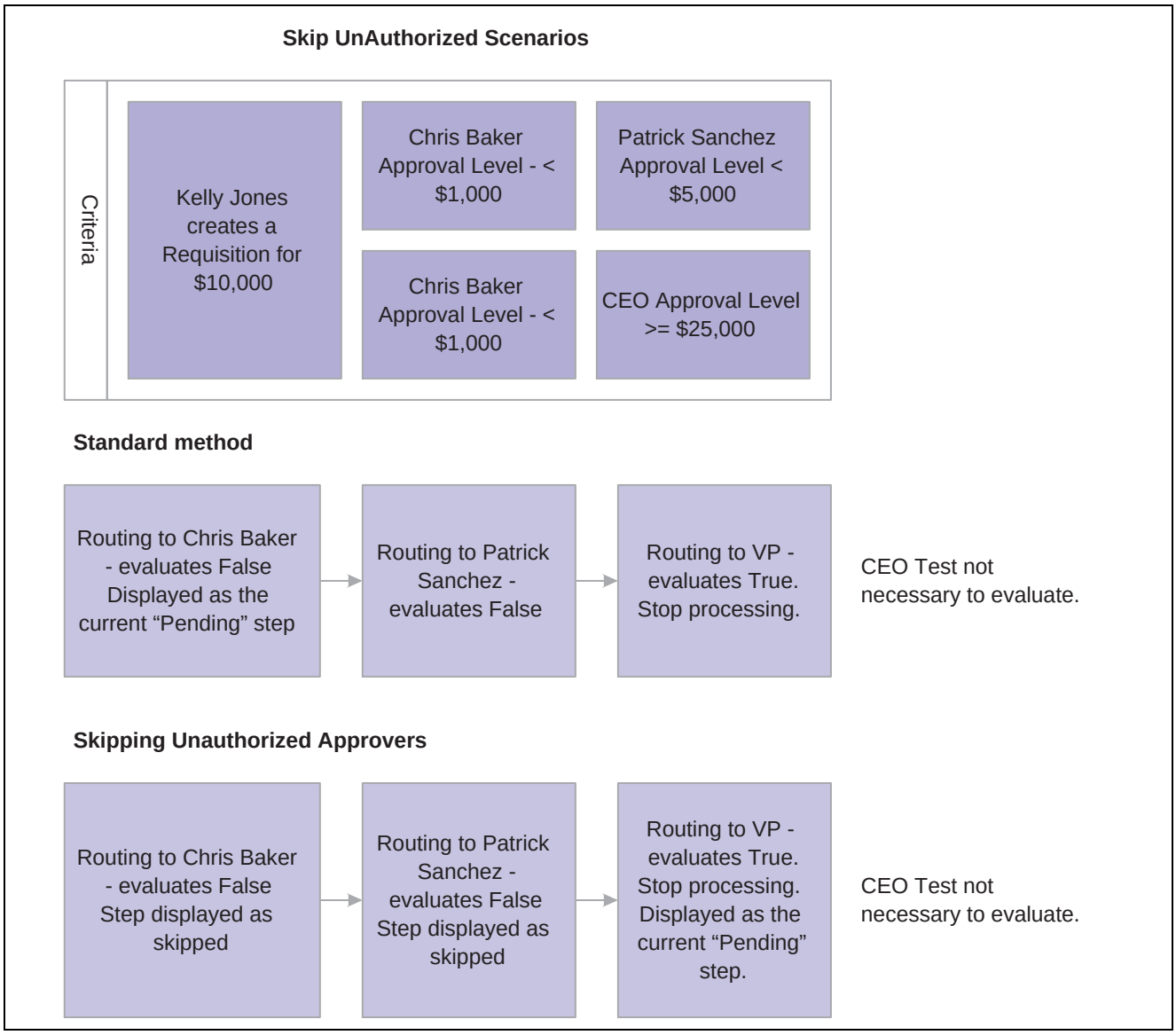
- Define user lists.
- Create an approver authorization.
- Define a dynamic approval path.

Two keys to creating a approval authorizations for dynamic paths are the system's ability to:

- Check authorizations.
- Skip unauthorized users.

The system looks at the user list and the approval authorization to determine which users are required to complete the authorization. The system displays the non-required users as a skipped step, instead of a pending step in the event that Skip Unauthorized is selected.

This diagram represents an example of a workflow routing setup to skip unauthorized users.



Skip Authorized

In the example, the criteria for the workflow approval path is set up for Chris Baker to have approval authority for less than 1,000.00 USD, Patrick Sanchez has authority for anything less than 5,000.00 USD, there is a VP approval of anything less than 25,000.00 USD, and if the requisition is over 25,000.00 USD, the CEO needs to approve.

Kelly Jones creates a requisition for 10,000.00 USD.

If the system is not set up to skip unauthorized users, the system displays Chris Baker, Patrick Sanchez, and the VP as a pending step in the approval path.

If the system is set up to skip unauthorized users, the system displays the approval path with the VP as the only listed approver, and will show Chris Baker and Patrick Sanchez as skipped.

See Also

Chapter 2, “Using Workflow and Managing Approvals,” Defining User Lists, page 31

Understanding Approval Authorizations

You can identify the approval authorization by role or user in conjunction with a dynamic step. To accomplish this, the approval workflow engine selects the appropriate supervisory approvers from the user list and verifies that the approver meets the criteria for authorization.

You establish approval authorizations for each transaction. The authorization can accommodate approvals by role or user ID.

You can set authorization across all SetIDs or for a specific SetID.

For each authorization the system checks the specific user ID to see if that individual could be a potential authorizer for the transaction. If found it checks the authorization criteria. If criteria are met, the user has the authorization in question.

If no authorization is found for a specific user ID, then the system looks for role-based authorizations using the an approval hierarchy.

For approval hierarchy, the system first looks for authorization by SetID. If no authorization is found, the system then seeks authorization for rows with a blank for the SetID. If no authorization is matched authorization approval criteria, the system process is deemed “Not Authorized”.

You can establish dynamic authorizations established for either the header or line level, but not both.

When workflow is initiated for a change order or requisition, the system compares the approval authorization data to the user list to verify the approval process. To verify the approval, the system:

1. Checks the user list, and assign the first approver to the first user returned from the user list.
2. Looks to the roles established for the user ID.
3. Identifies the approval limits set for that individual user ID.
4. Routes the requisition status to the first approver if the amount is satisfied for the requisition and the approver list is complete.
5. Continues to look for additional approvers until all conditions are met.
6. Routes the approval to the administrator if the approver criteria is never met.

See Also

Chapter 2, “Using Workflow and Managing Approvals,” Defining User Lists, page 31

Pages Used to Define Dynamic Approval Authorizations

Page Name	Object Name	Navigation	Usage
Approval Authorization	SAC_AW_AUTH.GBL	• Set Up Financials/Supply Chain, Common Definitions, Approvals, Approval Authorization • For PeopleSoft eProcurement, use eProcurement Administer Procurement, Maintain Workflow, Approval Authorization.	Authorize roles and approvers for dynamic paths.

Page Name	Object Name	Navigation	Usage
Approval Process Definition	SAC_AW_PRCS_MAIN	• Set Up Financials/Supply Chain, Common Definitions, Approvals, Approval Process • For PeopleSoft eProcurement, use eProcurement, Administer Procurement, Maintain Workflow, Approval Process Definition	Define workflow approval process stages.
Criteria Definition	SAC_CRITERIA	Click the Alert Criteria link on the Approval Process Definition page.	Define criteria for workflow approvals.
Path	SAC_AW_PATH_SEC	Click the Path Details link on the Approval Process Definition page.	Set up workflow approval paths.
Roles	PT_ROLEMAINT.GBL	• PeopleTools, Security, Permissions and Roles, Roles • For PeopleSoft eProcurement, use eProcurement, Administer Procurement, Maintain System Users and Roles, Roles	Set up roles for workflow.
Step	SAC_AW_STEP_SEC	Click the Step Details link on the Approval Process Definition page.	Define steps for workflow approvals.
User List Definition	SAC_USERLIST.GBL	• Set Up Financials/Supply Chain, Common Definitions, Approvals, User List • For PeopleSoft eProcurement, use eProcurement Administer Procurement, Maintain Workflow, User List Definition	Set up list of users for workflow approval.
User Profile	USER_GENERAL.GBL	PeopleTools, Security, User Profiles, User Profiles	Set up user IDs and assign roles

Defining User Lists for Dynamic Authorizations

Access the User List Definition page.

The approval workflow engine delivers a default user list *SAC_AW_SUPERVISOR* that addresses the most common approval scenario of routing an approval to a supervisor. If, for instance, the requester is an end user, and their immediate supervisor can't authorize more than 5,000.00 USD, and the requisition is for 6,000.00 USD, the requisition moves up the ladder to the next level supervisor. The user ID for the direct supervisor is listed on the user profile.

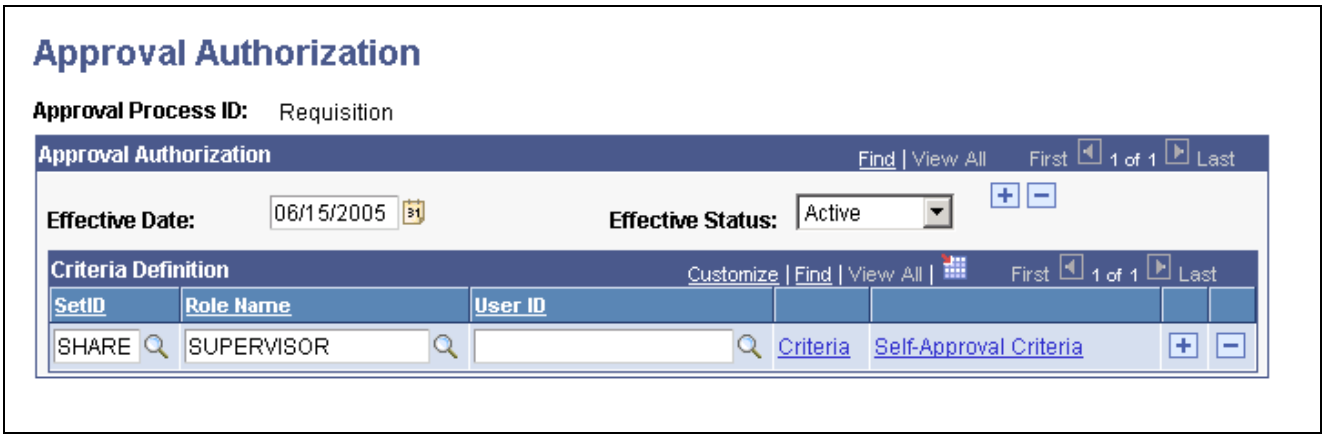
Note. To enable the SAC_AW_SUPERVISOR approval routing, you must have a supervisor assigned to your user ID on the user profile page.

See Also

Chapter 2, "Using Workflow and Managing Approvals," Defining User Lists, page 31

Setting Up Approval Authorizations

Access the Approval Authorization page.



Approval Authorization page

If you don't specify a SetID, the authorization is generic across all SetIDs. To create an approval authorization for specific SetIDs, you must add a line for each SetID.

Note. If you activate self-approval on the Approval Authorization page, it replaces the self-approval on static path steps.

Defining Dynamic Approval Paths

Access the Path page.

Check Authorizations Select to enable the approval authorization.

Skip Unauthorized Users Select to enable the approval process to skip users within the user list if the system determines that they can't satisfy all of the criteria for approval.

Note. When creating criteria within the path that will trigger the workflow engine to activate, be certain that you set up the final approver as a *Greater Than* so that there are no gaps.

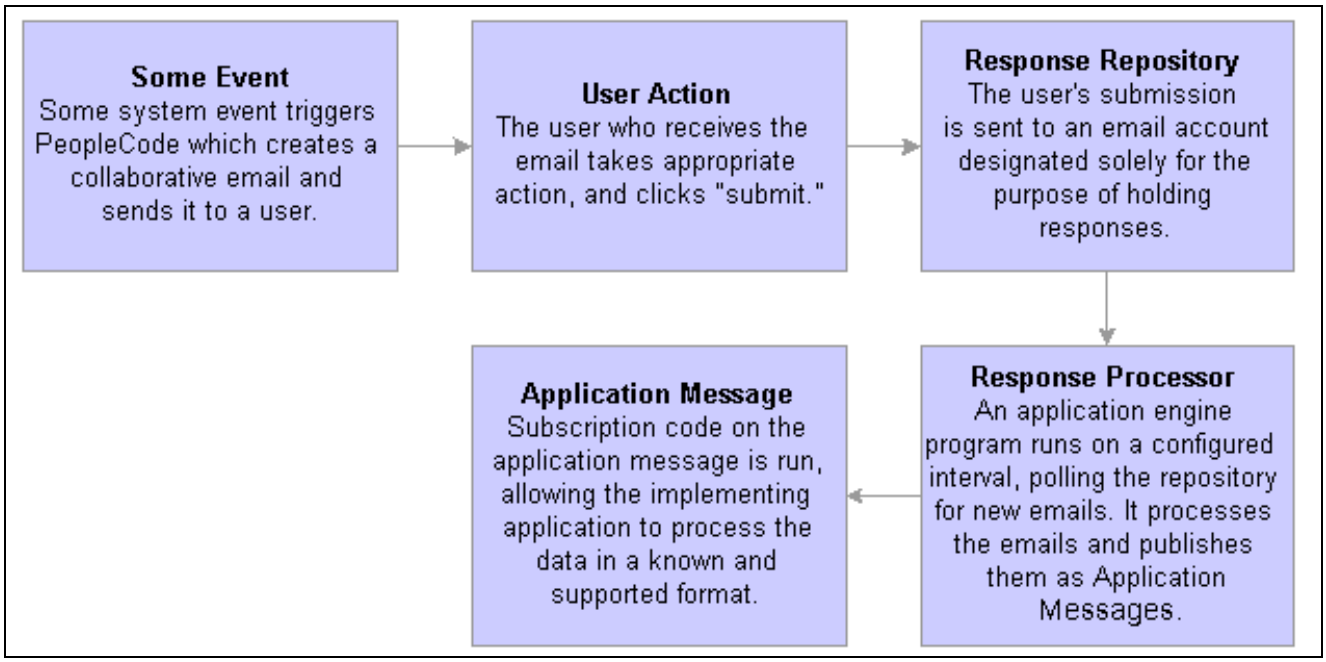
Enabling Email Collaboration

This section provides an overview of email collaboration, and explains how to enable email collaboration.

Understanding Email Collaboration

The email collaboration framework allows applications to send, receive, and process emails with interactive content. You can send an HTML form to the user, and they will not need to log into their system to perform tasks.

This diagram illustrates the flow of email collaboration.



Email collaboration process flow

Pages Used to Set Up Email Collaboration

Page Name	Object Name	Navigation	Usage
Gateways	IB_GATEWAY	PeopleTools, Integration Broker, Configuration, Gateways	Use the Gateways page to update the URL for your local gateway.
Properties	IB_NODE	PeopleTools, Integration Broker, Integration Setup, Node Definitions Select the Properties tab.	Use this page to modify the node properties required for email collaboration to function.
Connectors	IB_NODECONN	PeopleTools, Integration Broker, Integration Setup, Node Definitions Select the Connectors tab.	Use this page to modify the node connectors required for email collaboration to function.
Transactions	IB_NODETRXLIST	PeopleTools, Integration Broker, Integration Setup, Node Definitions Select the Transactions tab.	Define the message transactions for this particular node.

Page Name	Object Name	Navigation	Usage
Form Element Designer	SAC_EMC_ELEMENTS	Set up Financials/Supply Chain, Common Definitions, Email Collaborations, Form Element Designer	Define metadata used as system data when you deliver an email collaboration. **Note.** The grid is autopopulated with all the fields in your message definition, excluding those that are part of the EMC required records and any that are marked as *include* in your message definition.
Form Layout Designer	SAC_EMC_LAYOUT	Set up Financials/Supply Chain, Common Definitions, Email Collaboration, Form Layout Designer	Defines the layout of the email.
Approval Transaction Registry	SAC_AW_TXN	• Set Up Financials/Supply Chain, Common Definitions, Approvals, Approval Transaction Registry • For PeopleSoft eProcurement, use eProcurement, Administer Procurement, Maintain Workflow, Approval Transaction Registry	Set up the registry to use collaborative emails as part of notification.
Configuration Options	SAC_AW_TXN	• Set Up Financials/Supply Chain, Common Definitions, Approvals, Approval Transaction Registry, Configuration Options • For PeopleSoft eProcurement, use eProcurement, Administer Procurement, Maintain Workflow, Approval Transaction Registry, Configuration Options	Configure how a specific approval process uses email notification options.
Recurrence Definition	PRCSRECURDEFN	PeopleTools, Process Scheduler, Recurrences	Defines how often you want the process schedule to run processes.
Application Engine Request	AE_REQUEST	PeopleTools, Application Engine, Request AE	Set up the Request AE for SAC_EMC.

Page Name	Object Name	Navigation	Usage
Email Addresses	USER_EMAIL	• PeopleTools, Security, User Profile, User Profile Select the Edit Email Addresses link. • For PeopleSoft eProcurement, use eProcurement, Administer Procurement, Maintain System Users and Roles, User Profile Select the Edit Email Addresses link.	Modify email addresses.

Enabling Email Collaboration

To set up email collaboration:

1. Enable the *Pub/Sub* field to configure the application server.
2. Configure the Integration Broker node *PSFT_EMC_GETMAIL*.
3. On the properties page, enter the email address of the email repository in the EMC_REPOSITORY_EMAILADDRESS property.
4. (Optional) On the properties page, enter appropriate values for BCC and CC to automatically send a copy of all collaborative emails to the address specified.
5. On the connectors page, modify these properties according to your server setup:

   MCF_AttServ Enter the URL to your attachment server.

   MCF_Password Enter the password for the email repository account.

   MCF_Server Enter the server on which the email repository resides.

   MCF_User Enter the user name needed to log into the email repository.
6. Specify an interval for the process scheduler recurrence.
7. Create a request for the application engine to run the process *SAC_EMC.* Specify the process schedule server and the recurrence.
8. On the Configuration Options page, enter values for the notification options.

See Chapter 2, "Using Workflow and Managing Approvals," Defining the Approval Transaction Registry, page 20.

Using Escalations

This section provides an overview of escalations and discusses how to:

- Set up escalation event types.
- Set up the escalation event.

- Set up the notification and escalation manager (NEM).

Understanding Escalations

Escalations are used when an approver has not responded within a predefined time period to a pending approval. You can specify the time period (timeout), and alternate approvers to whom to escalate or forward the approval for further action. Timeout options are defined on the path details.

Pages Used to Set Up Escalations

Page Name	Object Name	Navigation	Usage
Event Types	SAC_NEM_EVENTS	Set up Financials/Supply Chain, Common Definitions, Notifications and Escalations, Event Types	Associate certain events to a particular server.
Setup Event	SAC_NEM_SETUP	Set up Financials/Supply Chain, Common Definitions, Notifications and Escalations, Setup Event	Define the evaluation and action details.
Schedule JobSet Definitions	PRCSDEFN	PeopleTools, Process Scheduler, Schedule JobSet Definitions	Define the job to run, and how often you wish it to run.

Setting Up Escalation Types

Access the Event Type page.

Event Type The system is delivered with an event type of *Escalation.*

Server Name Select the server on which to run the escalations.

See Chapter 3, "Setting Up and Using the Message Dashboard," page 47.

Setting Up the Escalation Event

Access the Setup Event page.

Event Type The server information that was entered on the Event Type page.

Event Types Description The value entered in the Description field on the Events Type page.

Active Select to enable the escalation process.

Recurrence Enter a time interval at which to run the evaluation process.

Repeat Time Enter a time period to limit the number of times the action step is run.

Evaluation Type Select a method for evaluation.

- *PeopleCode:* Select if you are using a custom application package/class written using PeopleSoft Application Designer.

- *Query Object:* Select if you are using a query set up using the PeopleSoft Query Manager tool.
- *SQL View:* Select if you are using a record object created using the Application Designer.

Note. For escalations, the evaluation type should be *SQL View*.

Action Type

- *PeopleCode:* Select if you are using a custom application package/class written using the PeopleSoft Application Designer.
- *Email:* Enter an email address and notification template.

Note. For escalations the action type should be *PeopleCode*.

Package Select the application package that contains the escalation utility.

Note. For escalations the package should be *SAC_AW*.

Class For escalations, select *Escalator*.

Setting Up Notification and Escalation Manager in the Process Scheduler

Access the Schedule JobSet Definitions page.

Schedule Name Select *SAC_NEM* for the notification and escalation manager.

Job Name Select *NEM_MAIN* for the notification and escalation manager.

Status Select *Active* for the notification and escalation manager.

Run Control ID Enter the run control that has the run configuration desired.

Recurrence Name Enter a value that specifies how often the process runs.

Using the Approval Monitor

This section provides an overview of the approval monitor and discusses how to utilize the approval monitor.

Understanding the Approval Monitor

The approval monitor gives administrators a view into all approvals to which they have access, as well as the ability to take necessary actions on pending approvals. Actions available for the administrator are:

Reassignment Allows the system administrator to reassign to one or more approvers all pending approvals based on search criteria.

Approve Allows the administrator to act on behalf of the assigned approver. The approval is initiated for a specific user, wherever that user may be pending

within a specific transaction. Once the administrator takes action, the approval resumes the approval process.

Denial Allows the administrator to act on behalf of the assigned approver. The denial is initiated for a specific user, wherever that user maybe pending within a specific transaction.

Ad Hoc Allows the administrator to add a reviewer or approver to a specific transaction.

Understanding Approval Reassignment

You can reassign pending tasks to another approver, or an administrator can reassign all of specific approver's tasks to another approver. Use reassignment in the following situations:

- The approver chooses to redirect the task to another approver, thus delegating a specific task (step) to another approver.
- The administrator decides to reassign all of an approver's pending tasks within a step to another approver. This is usually done when an approver is unexpectedly absent, and the administrator reassigns all pending tasks to another.

When you redirect a workflow task to another approver, you can modify the approval process map.

Note. The approval workflow engine is set up for administrative reassignment and escalations only.

Pages Used to Utilize the Approval Monitor

Page Name	Object Name	Navigation	Usage
Monitor Approvals	SAC_AW_ADM_MON_SRC	Set Up Financials/Supply Chain, Common Definitions, Approvals, Monitor Approvals	Use the Monitor Approvals page as a system administrator to search on approval processes, and perform mass reassignments.
Monitor Approvals	SAC_AW_ADM_MON_ACT	Set Up Financials/Supply Chain, Common Definitions, Approvals, Monitor Approvals Select the link for the approval step you want to modify.	Use this page to perform an action on a specific approval process.

Utilizing the Approval Monitor

Access the Approval Monitor page for a view of the approval process.

Approval Process Select an approval process. The list of approval processes available is determined by the administrator role associated with the approval process definition. If a user is associated with the role specified in the Admin. Role field on the Approval Process Definition page they can view, or act, or both on that process ID within the approval monitor.

See *PeopleSoft Enterprise eProcurement 8.9 PeopleBook*, "Using Approval Workflow Within PeopleSoft eProcurement," Defining Roles, Actions, and User-List Definitions.

Header Status Select a status in this field to display the selected status. Choices are:

- *Approved*
- *Complete*
- *Denied*
- *Hard Denied*
- *Initial*
- *Not Active*
- *Pending*
- *Terminated*

Approver Select an approver. You can view or take action on approval processes for a specific approver.

Approver Status Select a status from those available. This field is only available when a specific approver has been selected in the Approver field. The statuses available for selection are based on the statuses that specific approver has in the cross reference table associated to the approval process ID.

Originator The user who entered the transaction that started the approval process.

Using the Approval Monitor for a Specific Approval Process

Access the Approval Monitors page to take action on a specific approval process.

Approver Select an approver. Listed are all approvers associated with pending steps within the approval process.

Comments Enter text to appear under the approval graphic in an Approval Comment History section.

Reassign To Select an approver to whom to reassign all pending steps within the approval process.

See Chapter 2, "Using Workflow and Managing Approvals," Defining Approval Workflow Processes, page 4.

Allow Self-Approval Select to enable self-approval. When it is enabled, the approval is assumed, and the process continues.

See Chapter 2, "Using Workflow and Managing Approvals," Approval Features, page 7.

Allow Auto-Approval Select to enable auto-approval. When it is enabled, the system remembers an approver's action for that process at the header or line level, and applies the same action automatically for any subsequent appearance in the approval workflow routing

See Chapter 2, "Using Workflow and Managing Approvals," Approval Features, page 7.

Approve Click the Approve button to act on behalf of the selected approver. This action applies to all tasks pending for the approver selected within the context of the approval process.

See Chapter 2, "Using Workflow and Managing Approvals," Approval Features, page 7.

Deny Click the Deny button to act on behalf of the selected approver. This action will apply to all tasks pending for the approver selected within the context of the approval process.

Reassigning Tasks Assigned to You

To reassign your tasks to another approver, select a step assigned to you as an approver and request that the step be reassigned to an alternate. You must have an administrator role.

The approval workflow engine (AWE) reassigns that step to the newly appointed approver, and deletes the original approver's worklist entry. The system creates a new worklist entry for the new approver, and notifies the new approver.

The AWE adds a comment to the approval thread to log the reassignment.

Reassigning Tasks as an Administrator

To reassign a specific approver's pending tasks to another approver:

1. Filter the display to show pending approval processes for the specific approver.
2. Indicate the steps to be reassigned and the users affected.

   The system submits a request to the AWE to reassign all of the pending steps.

Once you have reassigned the pending tasks to a new approver, the approval path is updated and the approval transaction is routed to the new approver.

Note. You can create reassignments through the user profile, but workflow reassignments through the user profile don't alter the actual approval process. Reassigning using the Manage Approvals component performs the reassignment and creates the worklist for the new user.

The administrator also can take action instead of reassigning.

CHAPTER 3

Setting Up and Using the Message Dashboard

This chapter provides an overview of the message dashboard and discusses how to:

- Set up the message dashboard.
- Receive notifications using XML messages.
- Search and use the message dashboard.
- Create message notifications for new processes and categories.
- Identify the processes and categories delivered in the message registry.

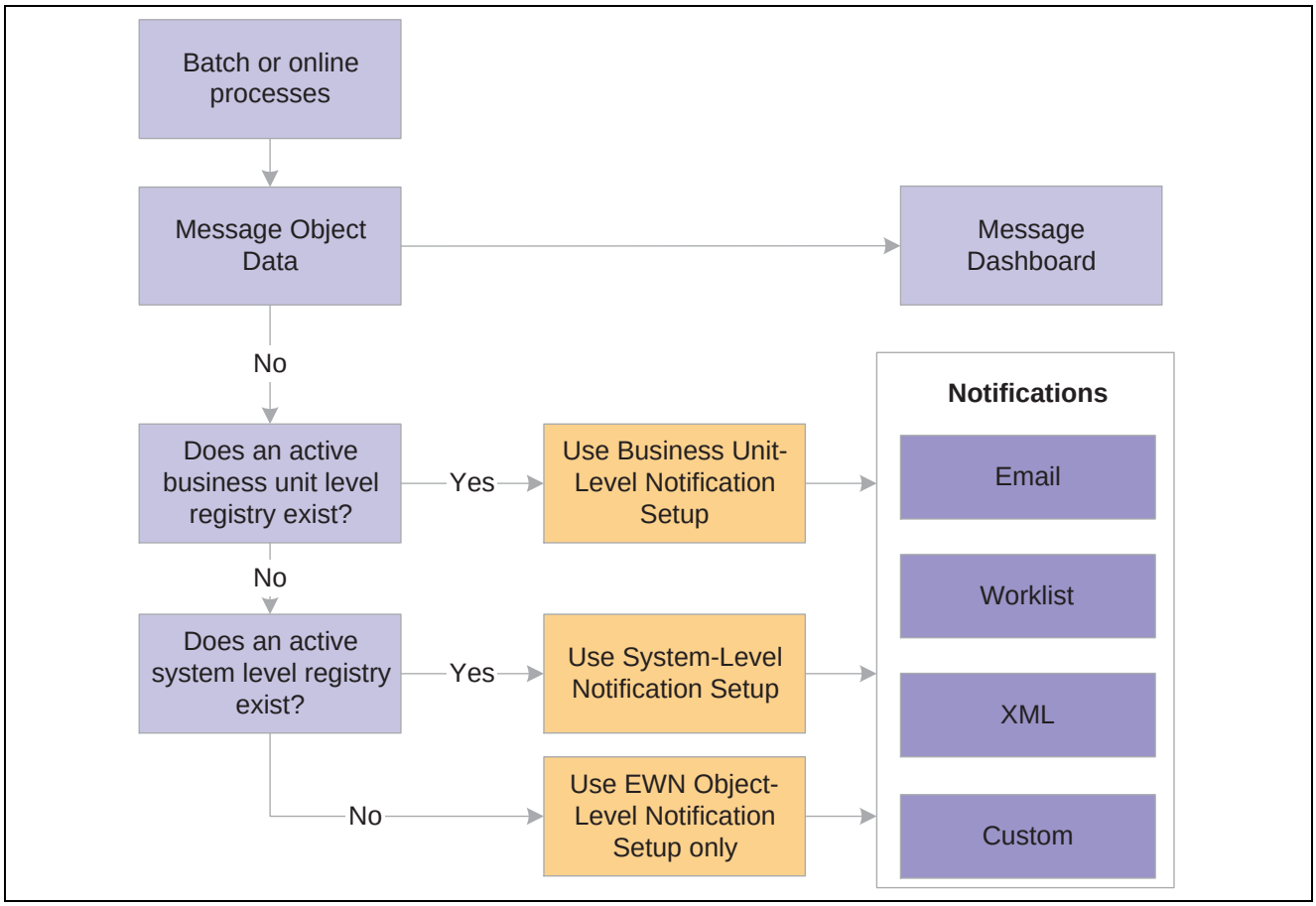
Understanding the Message Dashboard

The Message Dashboard is a central place to view information related to messages, warnings and errors that occur within many batch or online processes throughout the system. In addition to viewing information within the Message Dashboard, a user can receive notifications when these messages occur via an email, a worklist entry, or a XML message. The message dashboard provides information such as descriptive text, links, and context information, which enable the user to make a decision easier when certain conditions occur during batch and online processes.

PeopleSoft batch and online processes that send information (messages, warnings, and errors) to the message dashboard are:

- PeopleSoft Inventory
- PeopleSoft Order Management
- PeopleSoft Purchasing
- PeopleSoft Production Management
- PeopleSoft Work Order Management

This diagram illustrates the process flow of the message dashboard:



Message Dashboard process

A batch or online process creates a message, which is automatically sent to the message dashboard. If you have notifications enabled (set up in the message, system-level registry or business-unit level registry, the system notifies the appropriate person using an email, a worklist entry, or an XML message. If the notification is sent using an email or a worklist entry, a link is provided to take the individual to the message detail page of the message dashboard.

See Chapter 3, "Setting Up and Using the Message Dashboard," Identifying the Processes and Categories Delivered in the Message Registry, page 56.

Setting Up the Message Dashboard

This section discusses how to:

- Set up the message registry.
- Set up registry notifications at the system level.
- Set up registry notifications at the business-unit level.

Understanding Message Dashboard Setup

All messages from predefined batch and online processes can be viewed in the message dashboard with the delivered product. However, you can define two levels of notification overrides within the system. These two levels are:

- System Level Notifications
- Business-unit Level Notifications

System-level notifications are defined by the process name and the category. They enable you to override a notification for a specific process name and category for the entire system. For example, if Bob receives all of the notifications for the OM_PEGGING / RECEIPT process and he goes on an extended vacation, you can set up an override at the system level, which routes all of these specific messages to Steve.

Business-unit level notifications are defined by the process name, the category, and the business unit. They enable you to override a notification for a specific process name, category, and business unit within the system. For example, if Bob receives all of the notifications for the OM_PEGGING / RECEIPT process and he goes on an extended vacation, you can set up an override at the business-unit level, which routes all of the specific messages for business unit US001 to Steve and routes all of the specific messages for business unit US008 to Ralph.

When you set up system and business-unit level notifications you determine who should be notified when an error or warning occurs, and how they should be notified.

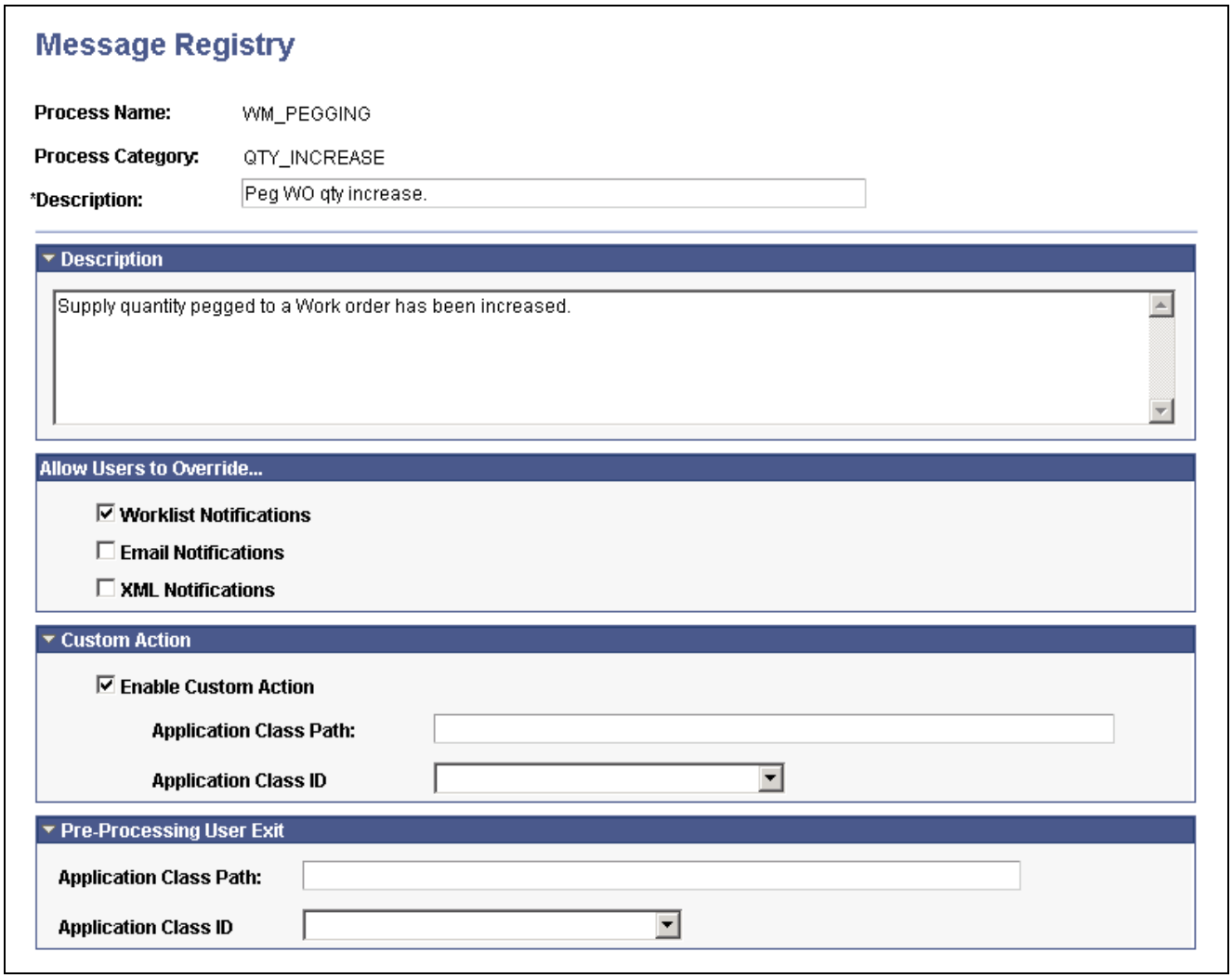
Pages Used to Set Up the Message Dashboard

Page Name	Object Name	Navigation	Usage
Message Registry	SAC_EWN_REGISTRY	Set Up Financials/Supply Chain, Common Definitions, Errors and Warnings, Message Registry	Set up the message registry, which defines the delivered notification processes and categories in the system.
System-Level Notifications	SAC_EWN_REG_SYS	Set Up Financials/Supply Chain, Common Definitions, Errors and Warnings, System-Level Notifications	Set up system-level notifications, which defines notification overrides at the system level for each process name and process category. This level of notification is optional.
BU-Level Notifications	SAC_EWN_REG_BU	Set Up Financials/Supply Chain, Common Definitions, Errors and Warnings, BU-Level Notifications	Set up business-unit level notifications, which defines notification overrides at the business-unit level for each process name, process category, and business unit. This level of notification is optional.

Setting Up the Message Registry

The message registry contains all delivered processes and categories. If you have customized your system with additional processes and categories, you can add to the message registry.

Access the Message Registry page.



Message Registry page

The message registry is defined by process name and process category.

Process Name An application batch or online process.

Category Name A logical partition of the application process. Category names are defined when the process is developed. For example, when the Reservation process runs, there are multiple messages related to item ID. All of these item ID-type messages are grouped into one category, so that one user can be notified when a message occurs. For each delivered process, the PeopleSoft system has categories that are delivered with the PeopleSoft product.

Note. If you are not making changes to the delivered processes, you do not need to add to the Message Registry.

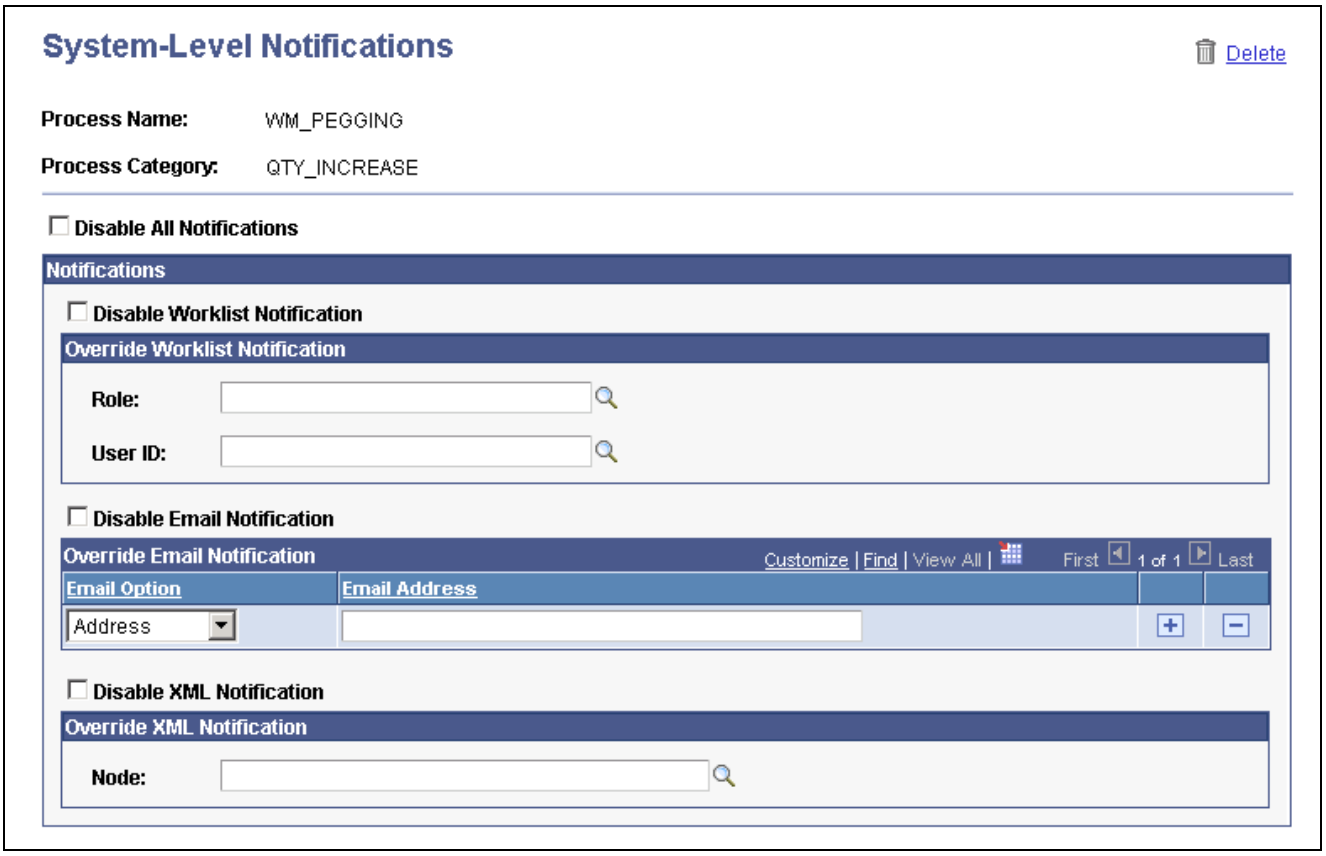
Description The description in the text box is considered the extended text description. This extended text description is accessed from the message dashboard when you click on the View Extension Text button.

Worklist Notifications, Email Notifications, and **XML Notifications**	Select to enable overrides at the system and business-unit levels for this message.
Enable Custom Action, Application Class Path and **Application Class ID**	Select to enable a customized action. Use this option if you have written your own application class for a customized action. Enter the Application Class Path and Application Class ID fields, which are extensions of the SCM_SAC_EWN_MVC:SCM_SAC_EWN_MODEL:EWN_PostProcessingUserExit class.
Pre-Processing User Exit - Application Class Path and **Pre-Processing user Exit - Application Class ID**	Enter the Application Class Path and Application Class ID fields. A preprocessing user exit tells the system to run another process before it determines who to notify. For example, a purchase order approval process is created that is based on the purchase order value. Purchase orders under 500.00 USD are approved by the department manager, and purchase orders over 500.01 USD are approved by the department director. The preprocessing user exit tells the system to run the purchase order approval process before determining who to notify, which are extensions of the SCM_SAC_EWN_MVC:SCM_SAC_EWN_MODEL:EWN_PreProcessingUserExit class.

See Chapter 3, "Setting Up and Using the Message Dashboard," Identifying the Processes and Categories Delivered in the Message Registry, page 56.

Setting Up Registry Notifications at the System Level

Access the System-Level Notifications page.



System-Level Notifications page

The Override Notification sections of this page are determined by the options selected on the Message Registry page.

Disable All Notifications Select to disable all notifications for this message.

Disable Worklist Notification Select to disable only worklist notifications for this message.

Role and **User ID** Select a role or a user ID that determines the person to notify for this message.

Note. If the Worklist Notifications check box is selected on the Message Registry page and the Role & User ID fields are not entered on the System Level Notifications page, then the worklist notification for the original message object (either UserID or Role) is used.

Disable Email Notification Select to disable only email notifications for this message.

Email Option Select *Address* or *UserID*. Depending on which option you select, the field to the right will change to *Email Address* or *User ID*. You may add multiple rows if needed.

Note. If the Email Notifications check box is selected on the Message Registry page, and you do not enter an Email Address on the System-Level Notifications page, then the Email Address notification for the original message object is used.

Disable XML Notification Select to disable only XML notifications for this message.

Node Select the Node Name for the XML notification.

Note. If the XML Notifications check box is selected on the Message Registry page, and you do not enter a Node on the System-Level Notifications page, then the XML notification (node) for the original message object is used.

Note. The notification of some processes are controlled by the owner of the transaction. For example, notification messages for pegging purchase orders goes to the buyer on the purchase order. Therefore, overriding notifications at the business-unit or system level is not enabled.

See Also

PeopleSoft Enterprise PeopleTools Integration Broker

SCM Architecture book, Pegging Supply and Demand, Setting Up Pegging

SCM Architecture book, Pegging Supply and Demand, Setting Up Notifications

Setting Up Registry Notifications at the Business-Unit Level

Access the BU-Level Notifications page.

The BU-Level Notifications page operates exactly like the System-Level Notifications page except that it enables you to specify a business unit as a key for notifications.

Receiving Notifications Using XML Messages

The PeopleSoft Application Messaging functionality provides a method for communication between external systems and PeopleSoft using industry standard XML-formatted messages. The error and warning framework can generate the application message, SAC_EWN_NOTIFY_MSG, to notify an external system that an error or warning has occurred in the PeopleSoft system.

To use this application message, use PeopleTools to:

1. Activate the SAC_EWN_NOTIFY_MSG message.
2. Set up an outbound asynchronous transaction defining the SAC_EWN_NOTIFY_MSG message on each node that receives the transaction.
3. Verify the SAC_EWN_MSG_CHNL message channel is in Run mode.

The previous setup instructions assume that the message environment has been set up in PeopleSoft Integration Broker.

See Also

PeopleSoft Integration Broker PeopleBook

PeopleSoft Enterprise Integration PeopleBook

Searching and Viewing the Message Dashboard

This section discusses how to:

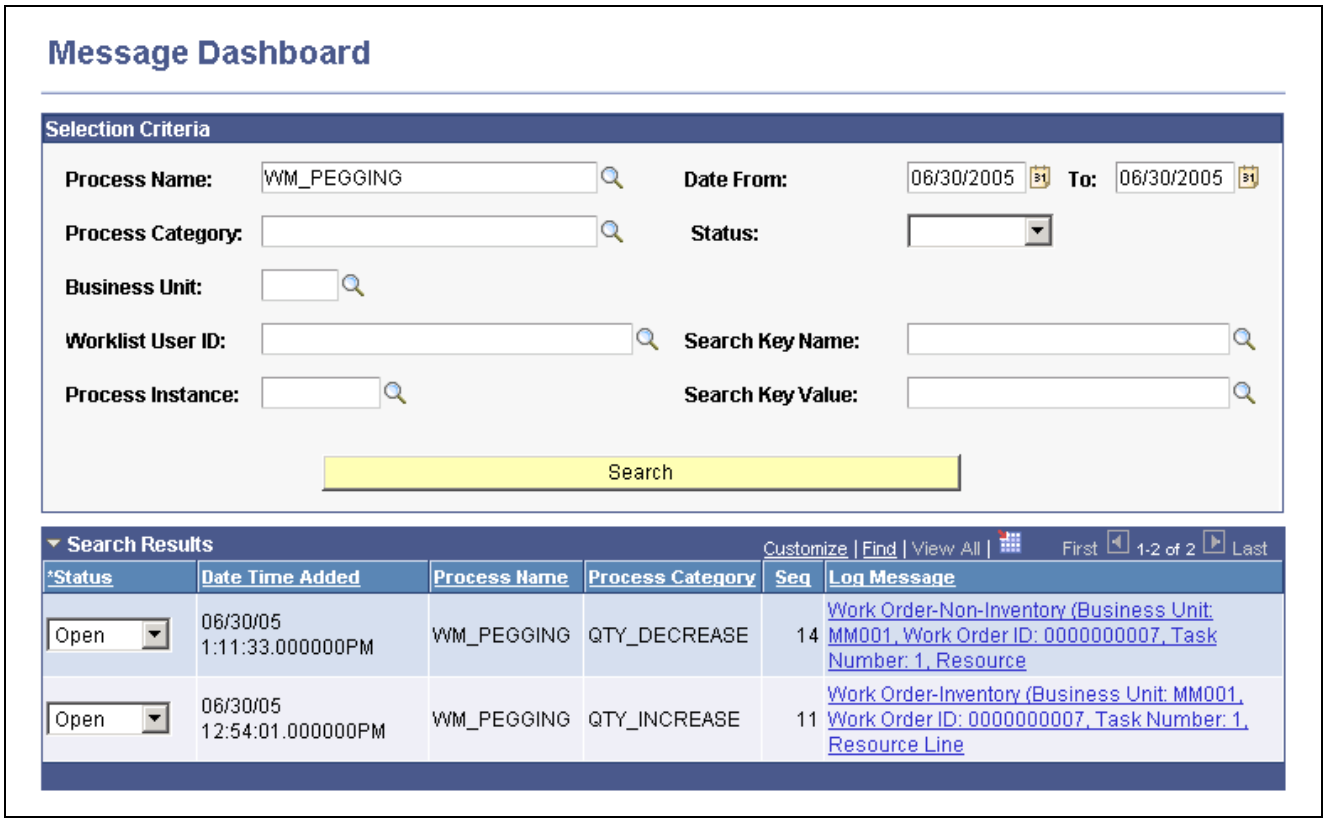
- Search for a message.
- View message details.

Pages Used to Search and View the Message Dashboard

Page Name	Object Name	Navigation	Usage
Message Dashboard	SAC_EWN_DSH_SRCH	Set Up Financials/Supply Chain, Common Definitions, Errors and Warnings, Message Dashboard	Search for a message that is created from a batch or online process.
Message Details	SAC_EWN_DASHBRD	Set Up Financials/Supply Chain, Common Definitions, Errors and Warnings, Message Details	View message details that are created from a batch or online process.

Searching for a Message

Access the Message Dashboard page.

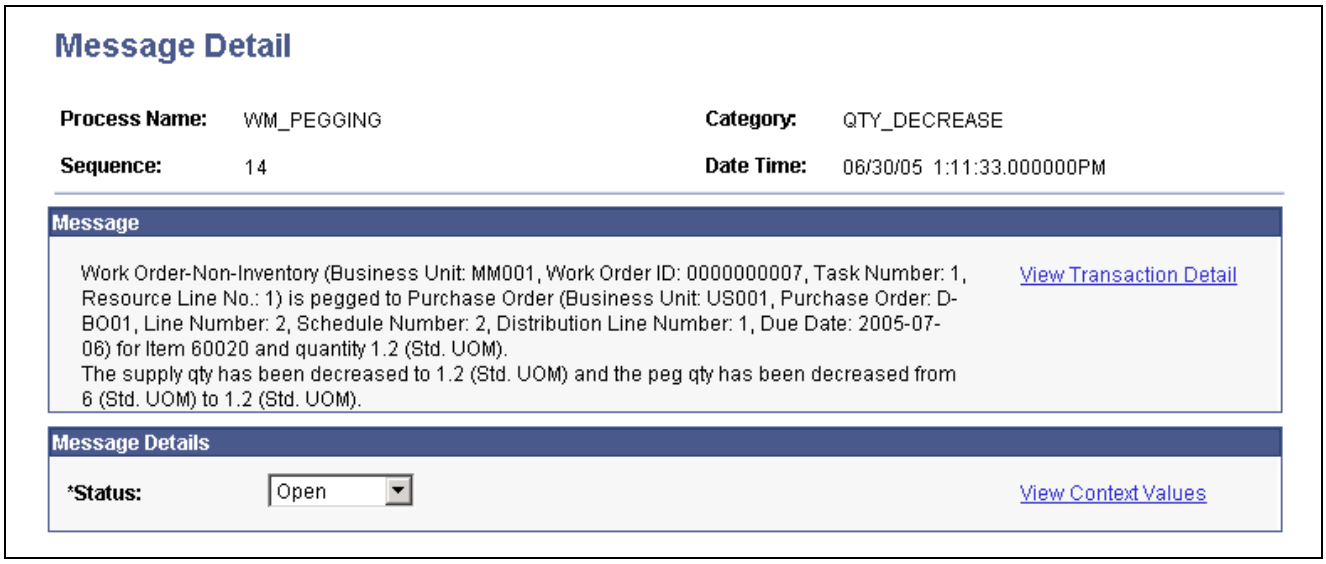


Message Dashboard page

The Message Dashboard page is used to search for messages based on selected search criteria.

Viewing Message Details

Access the Message Detail page.



Message Detail page

The Message Detail page provides valuable information for the user to take action regarding the message, which includes valuable links.

View Transaction Detail	Select this link to see the actual transaction page, and all the details of the transaction. This link is dependant on the employee servlet setup on the URL Maintenance page. See Chapter 3, "Setting Up and Using the Message Dashboard," Setting Up the Message Dashboard, page 48.
View Context Values	Select this link to view the technical information about the message.
View Explanation Text	Select this button to view the long text description that is entered on the Message Registry page.
Process Instance	Select this button to view the process monitor information.

Creating Message Notifications for New Processes and Categories

This section discusses how to create new message notifications for processes and categories that are not delivered with the PeopleSoft system.

If you have customized application processes that are delivered with the PeopleSoft system, you can add new processes and categories to the message registry.

Follow these steps to add to the message registry:

1. Add your process name and category to the message registry page.
    a. Add the description and long text description, which describes the functionality of the message that is logged into the registry so that you can assign the appropriate user to the notification classification.
    b. Disable any notification feature that your application does not allow you to override at the system and business-unit levels. These are notifications that are handled within the object interface directly.
2. Create a message context record to pass all transactional data through the message framework.
    a. All context records must include the SAC_EWN_LOG_KEY.
    b. Any additional transactional fields can be added to the context record.
3. Implement the EWN class within your application process by using the SCM_SAC_EWN_MVC:SCM_SAC_EWN_MODEL:EWN_INTERFACE class.

See Also

PeopleSoft Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Application Designer

PeopleSoft Enterprise PeopleTools 8.46 PeopleBook: PeopleCode Developer's Guide

PeopleSoft Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Application Engine

Identifying the Processes and Categories Delivered in the Message Registry

This table lists the processes and categories that are delivered in the Message Registry.

Application	Process Name	Process Category	Description
Inventory	IN_DEMAND	OM_BATCH_ TRANSACTION	Provide notification to both an Inventory manager and a PeopleSoft Order Management sales order owner that changes have been made to a sales order and/or demand, and that a log of changes is ready for review.
Inventory	IN_DEMAND	OM_ONLINE_ TRANSACTION	Provide notification to an Inventory manager of requested updates from PeopleSoft Order Management demand transactions. These are updates that must be performed via stock request Maintenance component because the demand change configuration does not allow PeopleSoft Order Management to update demand directly.
Inventory	IN_DEMAND	IN_OM_ONLINE_ TRANSACTION	Provide notification to the owner of an PeopleSoft Order Management sales order that changes were made to the sales order demand via stock request Maintenance component. The notification lets the sales order owner know that either (1) the demand data has been updated to be in sync with the associated sales order, or (2) a change was made in demand that needs to be applied to the associated sales order.
Inventory	IN_PEGGING	XFER_DMND_QTY_ INCREASE	Supply quantity pegged to a transfer demand has been increased.
Inventory	IN_PEGGING	XFER_DMND_QTY_ DECREASE	Supply quantity pegged to a transfer demand has been decreased.
Inventory	IN_PEGGING	XFR_SPLY_BREAK	The peg chain between a demand and a transfer supply has been broken.
Inventory	IN_PEGGING	XFER_DMND_RECEIPT	Pegged supply has been received / completed for a pegged stock request.
Inventory	IN_PEGGING	XFER_DMND_DTE_ RESCH_OUT	Supply date pegged to a transfer demand has been rescheduled out past the ship date.
Inventory	IN_PEGGING	XFER_DMND_DTE_ RESCH_IN	Supply date pegged to a transfer demand has been rescheduled in.
Inventory	IN_PEGGING	XFER_DMND_PUTAWAY	Pegged supply has been putaway for a pegged transfer demand.

Application	Process Name	Process Category	Description
Inventory	IN_PEGGING	XFR_SPLY_QTY_ DECREASE	Demand quantity pegged to a transfer supply has been decreased.
Inventory	IN_PEGGING	XFR_SPLY_DTE_RESCH_ OUT	Demand date pegged to a transfer supply has been rescheduled out.
Inventory	IN_PEGGING	XFR_SPLY_QTY_ INCREASE	Demand quantity pegged to a transfer supply has been increased.
Inventory	IN_PEGGING	XFR_SPLY_CLOSE	Demand pegged to a transfer supply has been closed.
Inventory	IN_PEGGING	XFR_SPLY_CANCEL	Demand pegged to a transfer supply has been canceled.
Inventory	IN_PEGGING	XFR_SPLY_DTE_RESCH_ IN	Demand date pegged to a transfer supply has been rescheduled in earlier than the transfer arrival date.
Inventory	IN_PEGGING	STK_RQST_DTE_RESCH_ IN	Supply date pegged to a stock request has been rescheduled in.
Inventory	IN_PEGGING	STK_RQST_CLOSE	Supply pegged to a stock request has been closed short.
Inventory	IN_PEGGING	STK_RQST_PUTAWAY	Pegged supply has been putaway for a pegged stock request.
Inventory	IN_PEGGING	STK_RQST_DTE_RESCH_ OUT	Supply date pegged to a stock request has been rescheduled out past the ship date.
Inventory	IN_PEGGING	STK_RQST_BREAK	Supply pegged to a stock request has been broken.
Inventory	IN_PEGGING	BATCHEMAIL	Provide notification to an inventory manager that pegging changes have been made and that a log of changes is ready for review.
Inventory	IN_PEGGING	STK_RQST_CANCEL	Supply pegged to a stock request has been canceled.
Inventory	IN_PEGGING	XFER_DMND_CANCEL	Supply pegged to a transfer demand has been canceled.
Inventory	IN_PEGGING	XFER_DMND_BREAK	Supply quantity pegged to a transfer demand has been broken.
Inventory	IN_PEGGING	XFER_DMND_CLOSE	Supply quantity pegged to a transfer demand thas been closed short.
Inventory	IN_PEGGING	STK_RQST_QTY_ INCREASE	Supply quantity pegged to a stock request has been increased.

Application	Process Name	Process Category	Description
Inventory	IN_PEGGING	STK_RQST_QTY_ DECREASE	Supply quantity pegged to a stock request has been decreased.
Inventory	IN_PEGGING	STK_RQST_RECEIPT	Pegged supply has been received / completed for a pegged stock request.
Inventory	IN_ RESERVATIONS	RESERVE_RULES	Notifications generated to an Inventory Manager from the reservation rules for non-VMI (vendor-managed inventory) orders.
Inventory	IN_ RESERVATIONS	RESERVE_RULES_VMI	Notifications generated to an Inventory Manager from the reservation rules for VMI orders.
Inventory	IN_ RESERVATIONS	BACKORDER	Manual backorder notification sent to Inventory Manager.
Order Management	OM_BILLING	FULFILLMENT_ INCOMPLETE	Some portion of the goods ordered on a counter sales order, and picked up by the customer, have not successfully completed the fulfillment process in Inventory. This activity is passed through the fulfillment process within a single EIP_CTL_ID. PeopleSoft Order Management_BILL cannot pass any customer pick up order activity for a given EIP_CTL_ID to billing until all of the goods that the EIP_CTL_ID represents are marked as depleted in inventory. You must correct the situation in Inventory so that all the goods associated with the EIP_CTL_ID are depleted before PeopleSoft Order Management_BILL will interface the activity to billing.
Order Management	OM_PEGGING	HARD_TO_SOFT	A hard peg chain for a sales order has been changed to a soft peg chain.
Order Management	OM_PEGGING	PUTAWAY	Pegged supply has been putaway for a pegged sales order.
Order Management	OM_PEGGING	HARD_PEG_QTY_ CHANGE	The pegged quantity changed on a sales order that is hard pegged to a supply.
Order Management	OM_PEGGING	QTY_INCREASE	Supply quantity pegged to a sales order has been increased.
Order Management	OM_PEGGING	RECEIPT	Pegged supply has been received / completed for a pegged sales order.
Order Management	OM_PEGGING	QTY_DECREASE	Supply quantity pegged to a sales order has been decreased.
Order Management	OM_PEGGING	CANCEL	Supply pegged to a sales order supply has been canceled.

Application	Process Name	Process Category	Description
Order Management	OM_PEGGING	CLOSE	Supply quantity pegged to a sales order supply has been closed short.
Order Management	OM_PEGGING	BREAK	A peg chain between supply and a sales order has been broken.
Order Management	OM_PEGGING	DTE_RESCH_OUT	Supply date pegged to a sales order has been rescheduled out past the ship date.
Order Management	OM_PEGGING	DTE_RESCH_IN	Supply date pegged to a sales order has been rescheduled in.
Order Management	OM_ RESERVATIONS	RESERVE_RULES	Notifications generated to the sales order owner from the reservation rules for non-VMI orders.
Order Management	OM_ RESERVATIONS	RESERVE_RULES_VMI	Notifications generated to the sales order owner from the reservation rules for VMI orders.
Order Management	OM_ RESERVATIONS	BACKORDER	Manual backorder notification to the sales order owner.
Purchasing	PO_PEGGING	HARD_PEG_QTY_ CHANGE	The pegged quantity changed on a purchase order that is hard pegged to a sales order.
Purchasing	PO_PEGGING	DTE_RESCH_OUT	Demand date pegged to a purchase order has been rescheduled out.
Purchasing	PO_PEGGING	QTY_INCREASE	Demand quantity pegged to a purchase order has been increased.
Purchasing	PO_PEGGING	QTY_DECREASE	Demand quantity pegged to a purchase order has been decreased.
Purchasing	PO_PEGGING	CANCEL	Demand pegged to a purchase order has been canceled and the peg chain status set to Cancel.
Purchasing	PO_PEGGING	BREAK	The peg chain between a demand and a purchase order has been broken.
Purchasing	PO_PEGGING	DTE_RESCH_IN	Demand date pegged to a purchase order has been rescheduled in earlier than the PO due date.
Purchasing	PO_PEGGING	CLOSE	Demand pegged to a purchase order has been closed.
Purchasing	PO_VRBT_ NOTIFY	NOTIFY_REBATE_MGR	Rebate Manager Notification.
Purchasing	PO_VRBT_ NOTIFY	NOTIFY_SETTLEMENT_ MGR	Settlement Manager Notification.

Application	Process Name	Process Category	Description
Purchasing	PO_VRBT_ NOTIFY	NOTIFY_CLAIMS_MGR	Claims Manager Notification.
Manufacturing	PRDN_PEGGING	DTE_RESCH_OUT	Demand date pegged to a production order has been rescheduled out.
Manufacturing	PRDN_PEGGING	DTE_RESCH_IN	Demand date pegged to a production order has been rescheduled in earlier than the PO due date.
Manufacturing	PRDN_PEGGING	QTY_INCREASE	Demand quantity pegged to a production order has been increased.
Manufacturing	PRDN_PEGGING	QTY_DECREASE	Demand quantity pegged to a production order has been decreased.
Manufacturing	PRDN_PEGGING	CANCEL	Demand pegged to a production order has been canceled.
Manufacturing	PRDN_PEGGING	BREAK	The peg chain between a demand and a production order has been broken.
Manufacturing	PRDN_PEGGING	CLOSE	Demand pegged to a production order has been closed short.
Purchasing	REQ_PEGGING	HARD_PEG_QTY_ CHANGE	The pegged quantity changed on a requisition that is hard pegged to a sales order.
Purchasing	REQ_PEGGING	DTE_RESCH_OUT	Demand date pegged to a requisition has been rescheduled out.
Purchasing	REQ_PEGGING	QTY_INCREASE	Demand quantity pegged to a requisition has been increased.
Purchasing	REQ_PEGGING	QTY_DECREASE	Demand quantity pegged to a requisition has been decreased.
Purchasing	REQ_PEGGING	CANCEL	Demand pegged to a requisition has been canceled and peg chain status set to cancel.
Purchasing	REQ_PEGGING	BREAK	The peg chain between one or more demands and a requisition has been broken.
Purchasing	REQ_PEGGING	DTE_RESCH_IN	Demand date pegged to a requisition has been rescheduled in earlier than the requisition due date.
Purchasing	REQ_PEGGING	CLOSE	Demand pegged to a requisition has been closed.
Maintenance Management	WM_PEGGING	QTY_DECREASE	Supply quantity pegged to a work order has been decreased.

Application	Process Name	Process Category	Description
Maintenance Management	WM_PEGGING	QTY_INCREASE	Supply quantity pegged to a work order has been increased.
Maintenance Management	WM_PEGGING	PUTAWAY	Pegged supply has been received / completed for a pegged work order.
Maintenance Management	WM_PEGGING	REQ_UPDATE	Peg work order supply has been decreased and reopening on requisition.
Maintenance Management	WM_PEGGING	RECEIPT	Pegged supply has been received / completed for a pegged work order.
Maintenance Management	WM_PEGGING	CANCEL	Supply pegged to a work order has been canceled.
Maintenance Management	WM_PEGGING	CLOSE	Supply quantity pegged to a work order has been closed short.
Maintenance Management	WM_PEGGING	BREAK	The peg chain between a supply and a work order demand have been broken.
Maintenance Management	WM_PEGGING	DTE_RESCH_OUT	Supply date pegged to a work order has been rescheduled out past the ship date.
Maintenance Management	WM_PEGGING	DTE_RESCH_IN	Supply date pegged to a work order has been rescheduled in.

CHAPTER 4

Pegging Supply and Demand

This chapter provides an overview of pegging and discusses how to:

- Peg in PeopleSoft Inventory
- Peg in PeopleSoft Order Management
- Peg in PeopleSoft Maintenance Management
- Peg in PeopleSoft Purchasing
- Peg in PeopleSoft Manufacturing
- Set up pegging.
- Use the Pegging Workbench.
- Change peg chains.
- Monitor peg chains.

Understanding Pegging

Pegging links demand to incoming supply. You can create a peg chain between a supply transaction and a demand transaction from either side. Demand transactions can peg to supply transactions and vice versa. A peg prevents the incoming supply from being reserved, or allocated to another demand transaction.

Sources of supply include:

- Requisitions and purchase orders from PeopleSoft Purchasing
- Incoming interunit transfers into the inventory business unit from another inventory business unit
- The primary outputs of Production IDs from PeopleSoft Manufacturing

Sources of demand include:

- Materials stock requests in PeopleSoft Inventory
- Outgoing interunit transfers from the inventory business unit to another inventory business unit
- Sales orders from PeopleSoft Order Management
- Work orders from PeopleSoft Maintenance Management

Note. You cannot create a peg to stock that has been received and putaway in the inventory business unit.

There are two types of pegs:

- A *soft peg* links an outgoing order to the quantity included in an incoming supply. A soft pegged supply can be pegged to one or many demands. A soft pegged demand can be pegged to one or many supply orders. When a soft peg is changed or canceled, the peg is changed but the other side of the peg (that is, the incoming supply or outgoing demand) is not changed. A notification is sent using the Message Dashboard. For example, a sales order for 10 units is soft pegged to an incoming purchase order with 2,000 units. Later, the customer service representative changes the sales order quantity from 10 units to 2 units. When the sales order is altered, the system changes the peg but the incoming supply (in this case the purchase order) is not changed. A notification is sent to the buyer (on the PO) informing them that a change in the demand pegged to the PO has taken place. Soft pegs are useful when items are in short supply and you want to peg higher priority customer orders to specific supply.
- A *hard peg* is created when a sales order (demand) creates a new purchase order, requisition, or interunit transfer to fulfill it. A hard pegged supply/demand can only be pegged to a single demand/supply. All other orders would be considered soft pegs and result in notifications only upon changes. When a hard peg is changed or canceled, not only is the peg changed, but also the incoming supply is changed. For example, a sales order for 10 units is hard pegged to an incoming purchase order with 10 units. If the sales order is changed to 4 units, then the purchase order is changed to 4 units. Hard pegs are useful for make-to-order items or special products.

Note. A change to a hard-pegged supply transaction does not update the demand transaction. This is notification only.

To create, change, or cancel a peg chain, you can:

- Access the Pegging Workbench where you can link demand to supply or supply to demand. The Pegging Workbench can be accessed directly through the menu or by a link located on other components in PeopleSoft Inventory, Order Management, Manufacturing, Purchasing, and Maintenance Management.
- Create pegs from the Alternate Sources of Supply page in PeopleSoft Order Management.
- Create pegs from the Maintain Requisitions or Maintain Purchase Orders components in PeopleSoft Purchasing for work orders with non-inventory items and description-only items.

Information about peg chains can be viewed and monitored using the:

- Pegging Inquiry page where you can view the pegging information without changing it.
- Pegging Exception report to review problems in pegging due to changes in dates, quantities, or cancelled orders; for example, the supply date is later than the demand ship date.

Rules for Items

For *inventory items*, the following rules apply:

- Product kits cannot be pegged.
- Configured product kits cannot be pegged.
- VMI (vendor-managed inventory) items cannot be pegged.
- ATP (available to promise) items can only be pegged from a work order from PeopleSoft Maintenance Management. ATP items cannot be pegged from material stock requests or sales orders; however, ATP items can be pegged to an transfer supply (interunit transfer).
- Only soft-reserve items can be pegged when working with material stock requests and sales orders. Work orders can use items that are not defined as soft-reserved.

You can only peg to *non-inventory items* for a sales order creating a direct ship purchase order or direct ship requisition and for a work order from PeopleSoft Maintenance Management. There will be peg chains in the pegging table for these items but you cannot maintain the pegs in the Pegging Workbench.

Understanding Peg Chains

The peg chain is maintained in the IN_PEGGING table. This table links the demand transaction to the supply transaction and includes the following fields:

- The QTY_PEGGED field, which stores the total pegged quantity between the demand and supply transactions. This quantity is in the standard unit of measure for the item.
- The *PEG_STATUS* field identifies the current state of the peg chain and includes the following values:
  - *Open:* (10) Indicates the line has a currently active peg.
  - *Completed:* (20) Indicates the peg chain is finished and the pegged supply has been received.
  - *Canceled*: (30) Indicates that either the pegged supply or pegged demand was canceled.
- The QTY_RECEIVED field, which stores the amount of the supply-side pegged quantity that has been received or completed. This quantity is in the standard unit of measure for the item.
- The QTY_COMPLETE field, which stores the amount of the supply-side pegged quantity that has been putaway into PeopleSoft Inventory. This quantity is in the standard unit of measure for the item.
- The HARD_PEG field is a yes/no field indicating a hard or soft peg.
- The DMD_DTTM field stores the schedule date of the demand transaction.
- The SUP_DTTM field stores the due date of the supply transaction.
- The DMD_OPEN_QTY field stores the order quantity of the demand transaction. This quantity is in the standard unit of measure for the item.
- The SUP_OPEN_QTY field stores the order quantity of the supply transaction. This quantity is in the standard unit of measure for the item.
- The DEMAND_HASH and SUPPLY_HASH fields identify the transactions that are pegged. The hash field can be converted to the order keys of the demand or supply transaction via the hash tables of the associated record. The hash tables and associated records are:
  - IN_DEMAND_HASH and IN_DEMAND: Demand fulfillment record in PeopleSoft Inventory.
  - PO_HASH and PO_LINE_DISTRIB: The purchase order distribution line record in PeopleSoft Purchasing.
  - REQ_HASH and REQ_LN_DISTRIB: The requisition distribution line record in PeopleSoft Purchasing.
  - SF_OUTPUT_HASH and SF_OUTPUT_LIST: The production ID line in PeopleSoft Manufacturing.
  - WM_WO_PO_HASH and WM_WO_SCHED_PO: For items to be ordered from PeopleSoft Purchasing, the work order task IDs resource line in PeopleSoft Maintenance Management.
  - WM_WO_MAT_HASH and WM_WO_SCHED_MAT: For items to be picked from PeopleSoft Inventory, the work order task IDs resource line in PeopleSoft Maintenance Management.

If a demand or supply date is changed, the system automatically updates the peg (including canceling the peg chain for canceled orders). If the peg is a hard peg and the user changes a demand date or quantity, the associated supply order itself is automatically changed as well. Optionally, notification can be sent to the relevant users (or user roles) that a change has taken place. Notifications are sent using the Message Dashboard. The setup for the Message Dashboard determines if the notification is logged on the dashboard, sent as an email and/or sent as a worklist entry in workflow.

Pegging in PeopleSoft Inventory

A material stock request in PeopleSoft Inventory can be used as the following order types for pegging:

- *Stock Request* (demand order type): material stock requests (MSR) shipping from an inventory business unit.
- *Transfer Demand* (demand order type): interunit transfers, a type of MSR, shipping from one inventory business unit to another inventory business unit.
- *Transfer Supply* (supply order type): interunit transfers, shipping from the sending inventory business unit is supply to the receiving inventory business unit.

Note. You can only peg a demand-side material stock request when the line is in an unfulfilled state and the item is a soft-reserve item.

You can access peg chains and create new peg chains by accessing the Pegging Workbench or view peg chains by accessing the Pegging Inquiry page from other PeopleSoft Inventory pages, including:

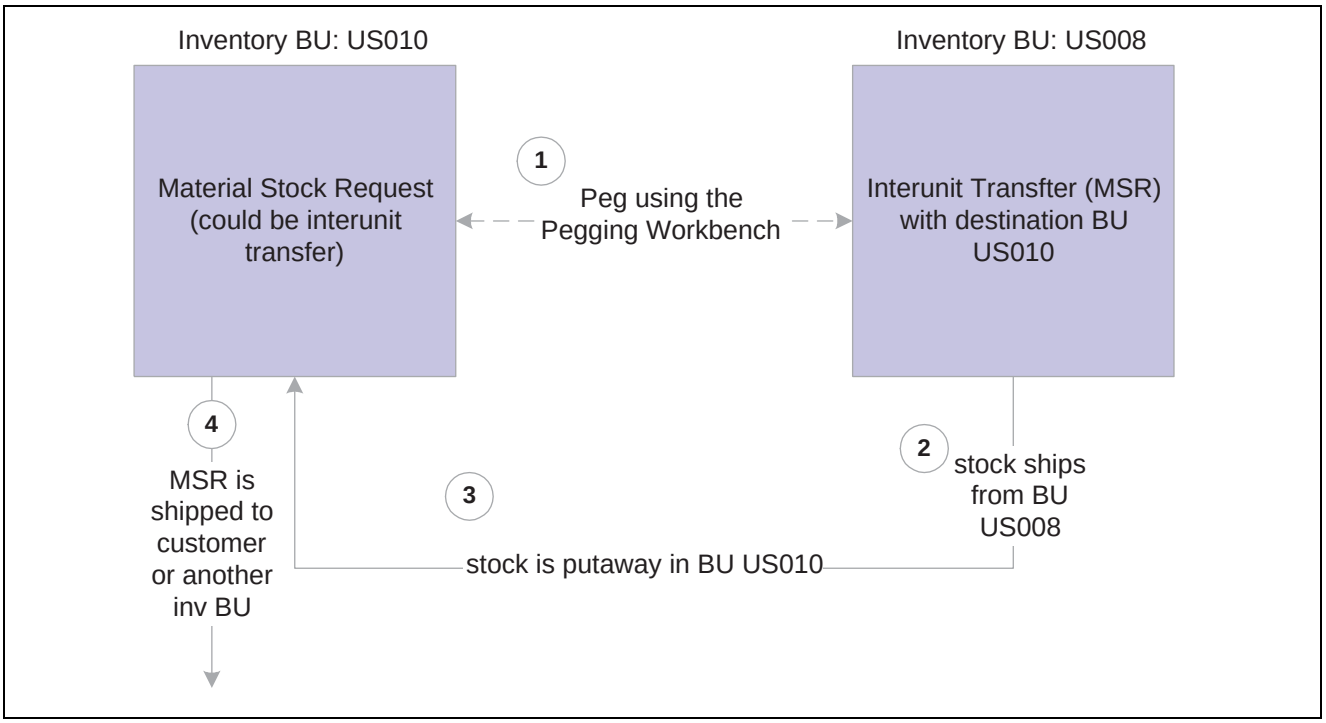
- Create/Update Stock Requests component
- Maintain Stock Requests component
- Shortage Workbench
- Stock Request inquiry page
- Fulfillment Status inquiry page
- Interunit Receipts page

Note. The link to the Pegging Workbench is only visible if the User Security page gives access to the user ID.

Pegging a Material Stock Request

You can peg a material stock request in PeopleSoft Inventory as the demand side of a peg. The stock request could be shipping to a customer, department, or another inventory business unit (demand-side interunit transfer).

This process flow diagram illustrates pegging material stock requests (demand) to an incoming interunit transfers (supply):



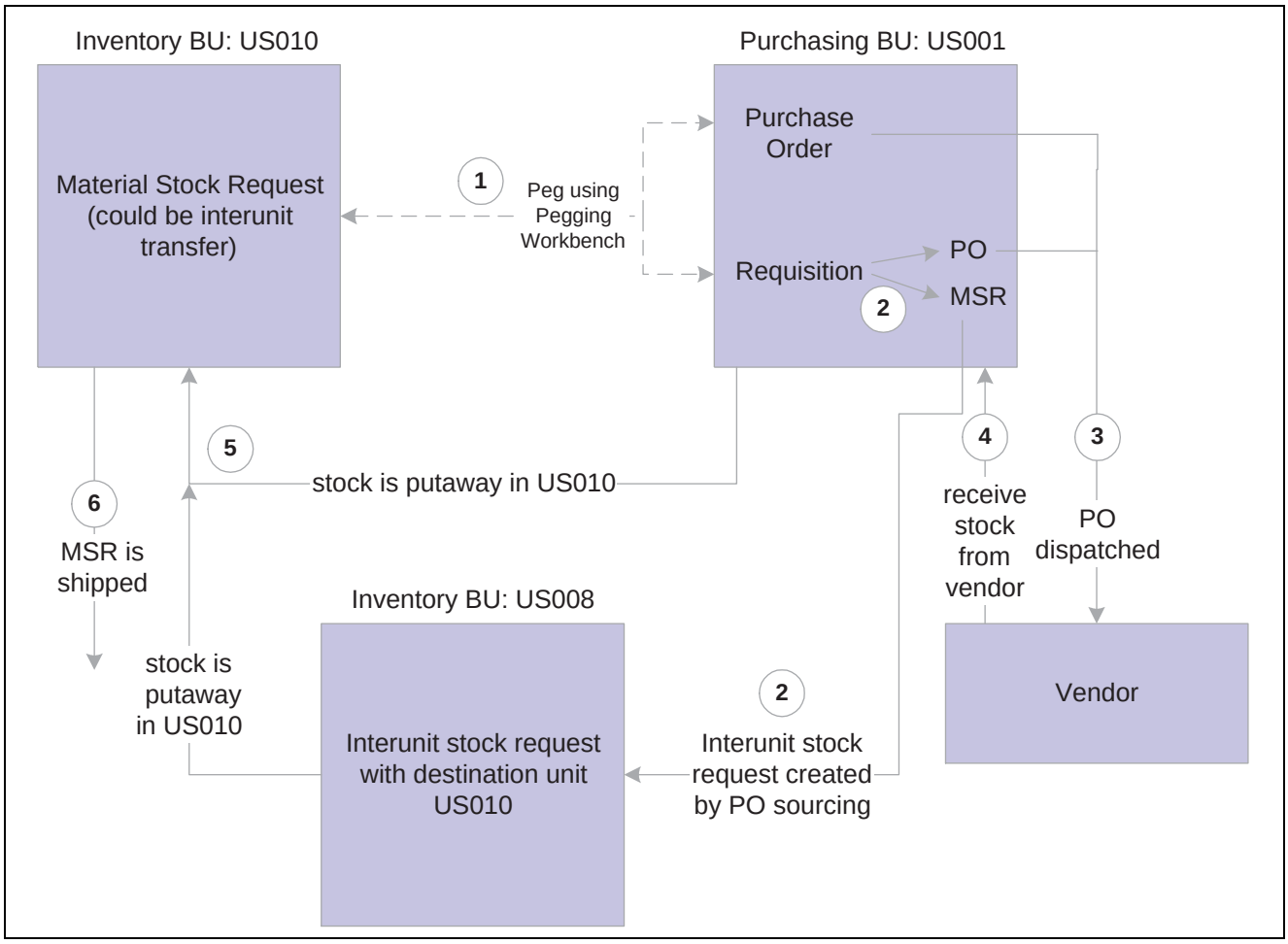
Pegging an MSR to another MSR

The sequence of events in the process flow when pegging an MSR to another MSR is:

1. Peg is created using the Pegging Workbench. A material stock request or an interunit transfer (demand-side) can be pegged to an interunit transfer (supply-side) with stock arriving in the business unit of the demand-side orders.
2. The supply-side interunit transfer is shipped from the sending business unit.
3. The supply-side interunit transfer is putaway in the destination business unit. During putaway, the stock is soft-reserved or optionally allocated to the outgoing material stock requests based on your setting in the pegging setup pages. In the IN_PEGGING table, if the pegged quantity (QTY_PEGGED field) is equal to the putaway pegged quantity (QTY_COMPLETE field) then the peg status in this table is updated to *complete.* If either the demand or supply order has no more open peg quantity, then the peg status on the order itself is also updated to *complete.*

   If the notification framework has been defined for the Message Dashboard, then a notification is sent to the owner of the peg when putaway is complete.
4. The material stock request (demand-side) is fulfilled and shipped to the customer, department, or another inventory business unit.

This process flow diagram illustrates pegging material stock requests to a requisition or purchase order:



Pegging an MSR to a requisition or purchase order

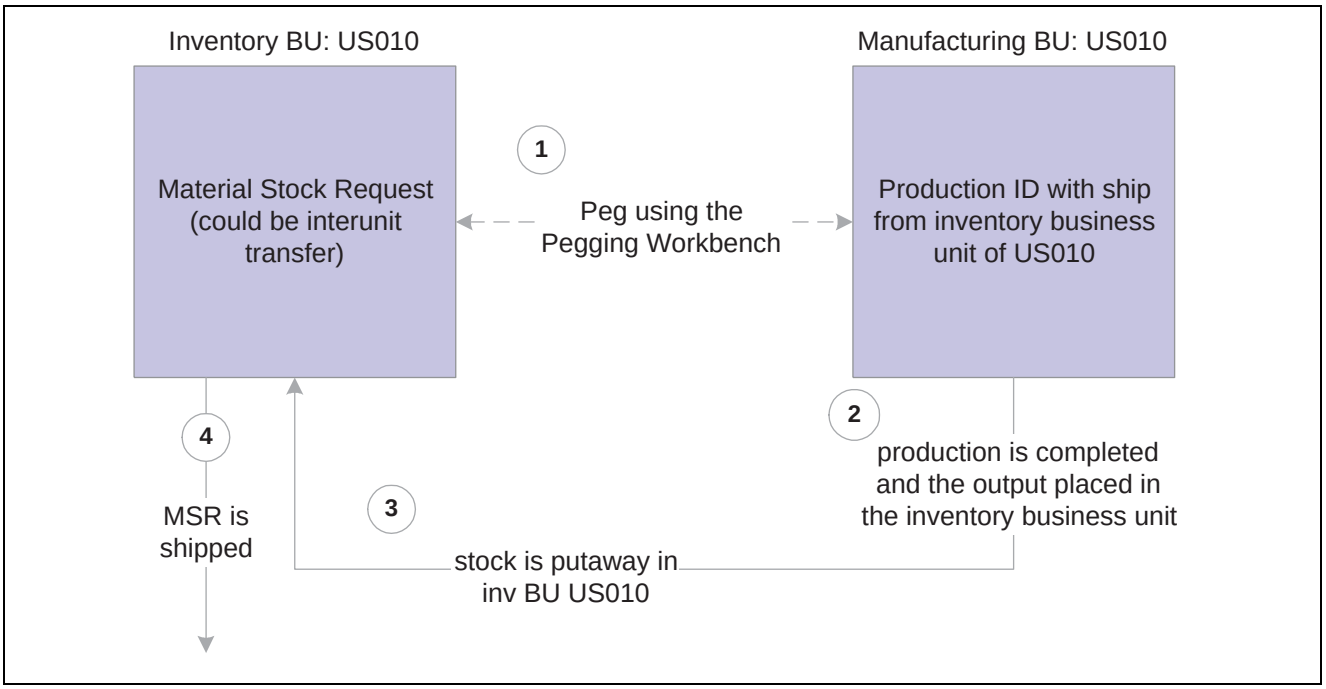
The sequence of events in the process flow when pegging an MSR to a requisition or purchase order is:

1. Peg is created using the Pegging Workbench. A material stock request can be pegged to a requisition or purchase order.
2. The requisition goes through the PO sourcing module and is sourced to an interunit stock request or a purchase order or both. The interunit stock request is created in the sending inventory business unit and is pegged to the MSR.
3. The purchase order is dispatched to the vendor.
4. The vendor ships the stock and it is received into the Purchasing business unit. If the notification framework has been defined for the Message Dashboard, then a notification is sent to the owner of the peg when stock is received into the Purchasing business unit.
5. The stock from the vendor or the sending inventory business unit is putaway in the inventory business unit. During putaway, the stock is soft-reserved or optionally allocated to the outgoing material stock requests based on your setting in the pegging setup pages. In the IN_PEGGING table, if the pegged quantity (QTY_PEGGED field) is equal to the putaway pegged quantity (QTY_COMPLETE field) then the peg status in this table is updated to *complete.* If either the demand or supply order has no more open peg quantity, then the peg status on the order itself is also updated to *complete*.

   If the notification framework has been defined for the Message Dashboard, then a notification is sent to the owner of the peg when the stock completes putaway in the Inventory business unit.

6. The material stock request (demand-side) is fulfilled and shipped to the customer, department, or another inventory business unit.

This process flow diagram illustrates pegging an MSR to a production ID in PeopleSoft Manufacturing:



Pegging an MSR to a production ID

The sequence of events in the process flow when pegging an MSR to a production ID is:

1. Peg is created using the Pegging Workbench. A material stock request (demand) can be pegged to a production ID when the Manufacturing business unit is the same as the *Ship From* Inventory business unit. You can only peg to the primary output of a production ID.
2. The production is completed and the output placed in the inventory business unit.
3. During putaway, the stock is soft-reserved or optionally allocated to the outgoing material stock requests based on your setting in the pegging setup pages. Once the production order is closed the peg status is changed to *complete* on both the demand and supply transactions.

   If the notification framework has been defined for the Message Dashboard, then a notification is sent to the owner of the peg when the stock completes putaway in the Inventory business unit.
4. The material stock request (demand-side) is fulfilled and shipped to the customer, department, or another inventory business unit.

Receiving Pegged Supply into PeopleSoft Inventory

Pegging links the stock coming into the PeopleSoft Inventory business unit to the outgoing orders. This peg prevents the incoming stock from being reserved or allocated to another order. For slow-moving items or customized orders, pegging enables you to keep inventory levels low and still deliver product efficiently to a customer. Pegging can also insure that customers get stock from the same lot or at a special cost.

Pegged supply can be received into a PeopleSoft Inventory business unit from an interunit transfer, a receipt from PeopleSoft Purchasing, or a completion from PeopleSoft Manufacturing. When the supply is received into the inventory business unit, it can be soft-reserved or hard-allocated to the demand line so that no other order can take the material. If the supply is received within the pegging lead days for the outgoing order (demand), then the stock can be placed in a default pegging putaway location so that it is easily found and shipped. In addition, the demand information is printed on the putaway plan.

When the pegged demand line is ready to be picked, the Order Release process attempts to pick from the default pegging putaway location first (unless the line is already allocated). If there is not enough stock in the default location, the Order Release process picks the available stock and then picks the remaining quantity requested from the material storage locations selected by the standard picking method.

Load Staged Items Process

After the items slated for putaway have been inserted into the staging interface tables (STAGED_INF_INV and STGCOST_INF_INV), launch the Load Staged Items process to insert the items into the putaway staging tables (STAGED_ITEM_INV and STAGED_COST_INV). If the supply being putaway is pegged to a demand, then the Load Staged Items process associates the staged putaway to a specific demand and looks for a putaway location by:

1. Placing the stock in the material storage location specified on the putaway transaction or input by the user online.
2. If no location is specified on the putaway transaction or online, then the system determines if the pegged order (outgoing demand) is scheduled to ship within the pegging lead days window, if so the pegged supply quantity is received (putaway) into the default pegging location specified. If the pegged order is not within the pegging lead days window, the pegged supply quantity is received into the standard material storage location determined by the putaway processes.

If a default pegging putaway location is needed, the Load Staged Items process looks to the Default Putaway Locations page for a default pegging location defined by business unit and item ID. If none is found, the process looks to the Default Pegging Putaway Location Details page for a pegging location defined by inventory business unit.

One putaway (supply transaction) can be pegged to multiple demand transactions. If a partial receipt of the supply transaction is putaway, then the Load Stage Items process uses the Final Sort Option on the Setup Fulfillment component to determine how the incoming stock is applied to the demand transactions. For example, assume a purchase order with 100 units in total is pegged to one sales order (40 units pegged) and one material stock request (50 units pegged). A partial receipt of 30 units is received and putaway in the inventory business unit. The Load Staged Items process associates the staged putaway to a specific demand. In this case, the process determines how to associate the 30 units by using the Final Sort Option to prioritize the demand transactions.

Directed Putaway

If directed putaway is enabled for the inventory business unit, then the default pegging location is used for putaway of pegged supply following the same rules stated above for the Load Staged Items process. Capacity checking is ignored when placing stock in the default pegging location because it is assumed the shipment will occur in a short time frame. Directed putaway can be launched from a link on an online page. The following pages use default pegging locations during direct putaway:

- InterUnit and RMA Receiving component. In addition, when receiving interunit transfers that are pegged supply, the InterUnit and RMA Receiving - Receipt Line page displays a link to the Pegging Inquiry component.
- Review Plan page
- Managing Receipts page in PeopleSoft eProcurement

- Maintain Receipts component in PeopleSoft Purchasing
- Record Completions and Scrap in PeopleSoft Manufacturing

Complete Putaway Process

The Complete Putaway process is the final stage in inventory putaway that updates the available quantity and inbound cost in the appropriate system tables. In addition, for pegged items, it can reserve or allocate the putaway quantity to an outgoing demand (materials stock request, interunit transfer, sales order, or work order). The Complete Putaway process performs a soft-reserve or hard-allocation based on your setting in the Pegging Setup page or the Pegging Item Setup page.

Once stock has been putaway in the inventory business unit, the Complete Putaway process:

1. Updates the putaway quantity (QTY_COMPLETE) in the IN_PEGGING record.
2. If all the pegged quantity has been received and putaway (QTY_COMPLETE=QTY_PEGGED), sets the peg status to *complete* in the IN_PEGGING record and in the supply and demand transactions.
3. If the notification framework has been defined for the Message Dashboard, sends a notification to the owner of the peg when putaway is complete.

See Chapter 4, "Pegging Supply and Demand," Setting Up Notifications, page 93.

Reservations Processing

Pegged quantities can only exist in an *unfulfilled* demand line and are not moved to the *releasable* state until the peg is at least partially received. When the pegged supply is received and putaway in the inventory business unit, the peg status is changed to *complete*; enabling the demand line to be picked up by the Reserve Materials process and moved downstream. Keep in mind that the formerly-pegged quantity is reserved or allocated by the Complete Putaway process when the supply is putaway. Partial receipts do not set the peg status to *complete.*

When a demand line has both pegged and unpegged quantities, then the reservations process only attempts to reserve the unpegged portion of a demand line. For example, if a demand line has a total quantity of 10 units, and 4 are pegged, then the Reserve Materials process attempts to reserve the 6 unpegged units based on the reservation rules. If the unpegged portion of a demand line can be reserved and the peg portion is not yet complete, then the pegged portion is backordered and unpegged portion is reserved and set to releasable. The backorder rules determine if the pegged portion should be backordered or canceled. If a backorder is created, then the peg chain is updated to peg the backorder line to the incoming supply. When the supply comes in, the backorder line is fulfilled.

Picking and Shipping

The Order Release process sets the demand lines to the *released* fulfillment state for picking and generates the pick plan. For demand lines with a pegged quantity that was reserved during the Complete Putaway process, the Order Release process can now allocate stock from a specific material storage location. Allocation is optional. If you choose to create an allocation, the Order Release process attempts to find stock to allocate to a pegged quantity in:

1. The default pegging location defined on the Default Putaway Locations page for the inventory business unit and item ID combination.
2. If no location is specified on the Default Putaway Locations page or no stock is available in the location, then the system looks to the Default Pegging Putaway Location Details page to determine if a default pegging location has been specified for the inventory business unit.
3. If there is no default pegging location or no stock available in the location, then the system uses the picking method specified on the Order Release process page.

Keep in mind that pegged quantities that were allocated during the Complete Putaway process will keep that allocation when released for picking.

The system can ship order from the unfulfilled state using the Fulfillment Workbench, Front End Shipping process page, Shipping Request process page, the Front-End Shipping transaction, or the Shipping Transaction. These processes do not pick up and ship from the unfulfilled state when the demand line is fully or partially pegged (that is, the peg status is not complete).

Pegging in PeopleSoft Order Management

A sales order in PeopleSoft Order Management can be pegged as demand to any supply order type; interunit transfers (supply-side) in PeopleSoft Inventory, production IDs from PeopleSoft Manufacturing, and requisitions or purchase orders from PeopleSoft Purchasing. Sales orders can use soft-pegs or hard-pegs. A peg for a sales order can by created using:

- The Alternate Sources of Supply page in PeopleSoft Order Management.

  The Alternate Sources of Supply page enables you to create pegs, cancel pegs, change peg quantities, and view existing pegs. When needed, this page provides a link to the Pegging Workbench.
- Automatically from a direct ship from vendor sales order.
- The Requisition Loader (PO_REQLOAD) process or the Production Request (CPPIPRDN) process for a configured item on a sales order.

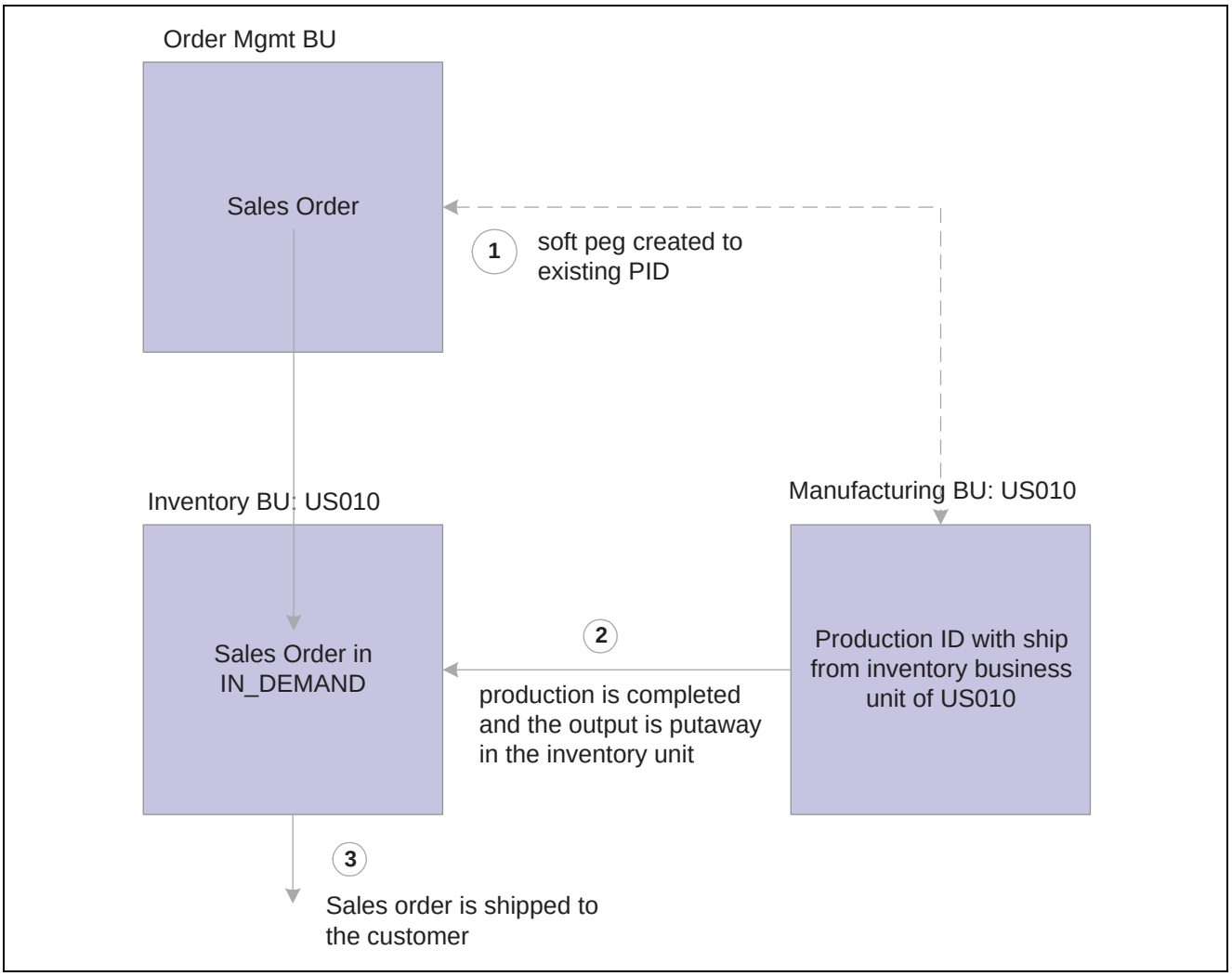
Direct ship from a vendor and direct receipt sales orders from PeopleSoft Order Management are the only transactions that can create a hard peg.

You can create new pegs and change existing peg chains for sales orders by using the Alternate Sources of Supply page in PeopleSoft Order Management. If the sales order schedule is pegged and has more than one demand line in the *unfulfilled* state, then the Alternate Sources of Supply page displays the Change Quantity link to take you to the Pegging Workbench.

Note. The link to the Pegging Workbench is only visible if the User Security page gives access to the user ID.

You can view peg chains for sales orders using the Sales Order Supply Source Detail page in PeopleSoft Order Management.

This process flow diagram illustrates pegging a sales order to a production ID:



Pegging a sales order to a production ID

The sequence of events in the process flow to soft peg a sales order to a production ID is:

1. Peg a sales order to an existing production ID using the Alternate Sources of Supply page in PeopleSoft Order Management. The CSR selects an existing production order as a supply source. This creates a soft peg. When the sales order is saved it is inserted into the IN_DEMAND table in PeopleSoft Inventory. The Manufacturing business unit of the production ID must be the same as the *Ship From* Inventory business unit on the sales order. You can only peg to the primary output of a production ID.

   Note. You cannot create a new production ID (hard peg) from a sales order.

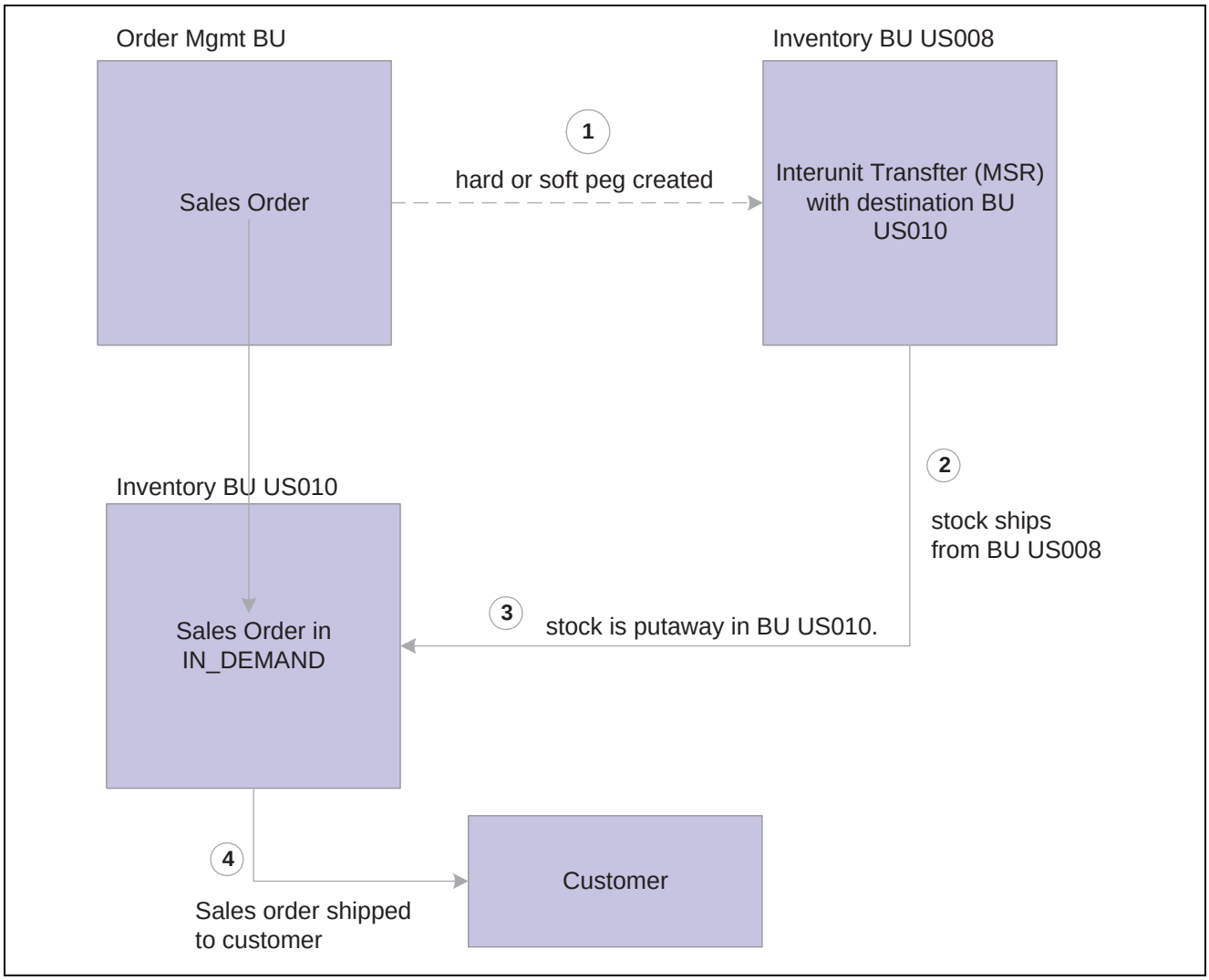
2. The production is completed and the output placed in the inventory business unit. During putaway, the stock is soft-reserved or optionally allocated to the sales order. The peg status is changed to *complete* in the IN_PEGGING record and in the supply and demand transactions if either:

   - The production order is closed.
   - All the pegged quantity has been received and putaway (QTY_COMPLETE=QTY_PEGGED).

   If the notification framework has been defined for the Message Dashboard, then a notification is sent to the owner of the peg when the stock completes putaway in the Inventory business unit.

3. The sales order is fulfilled in PeopleSoft Inventory and shipped to the customer.

This process flow diagram illustrates pegging a sales order to an interunit transfer (supply):



Pegging a sales order to an interunit transfer

The sequence of events in the process flow to peg a sales order to an interunit transfer is:

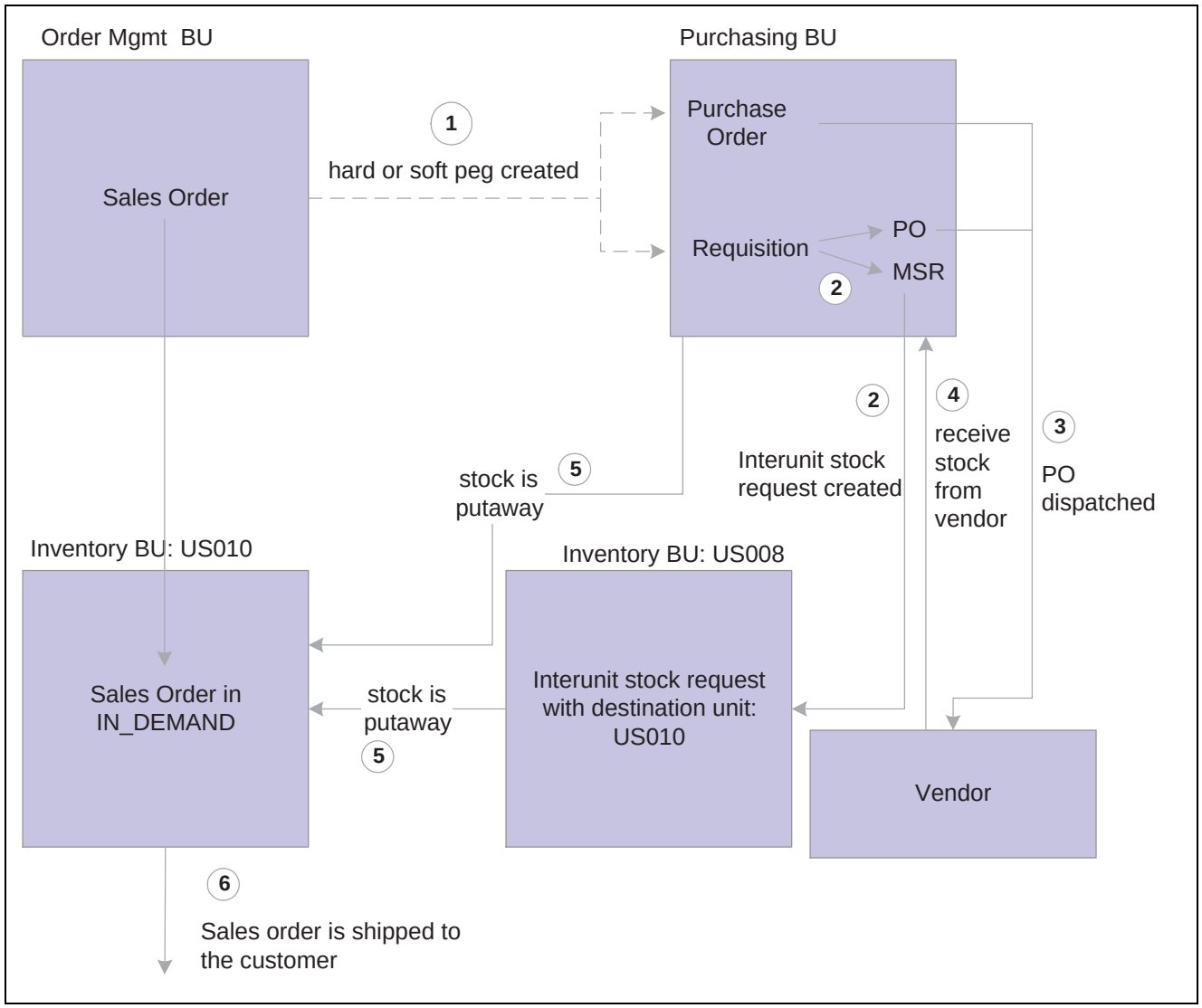
1. Peg a sales order by using the Alternate Sources of Supply page to:
   - Create a *soft peg* between the sales order and an existing interunit transfer.
   - Create a new interunit transfer to fulfill the sales order. This is a *hard peg* between the sales order and interunit transfer. The interunit transfer (MSR) is created when the sales order is saved.

   When the sales order is saved it is inserted into the IN_DEMAND table in PeopleSoft Inventory.
2. The supply-side interunit transfer is shipped from the sending business unit.
3. The supply-side interunit transfer is putaway in the destination business unit. During putaway, the stock is soft-reserved or optionally allocated to the outgoing sales order based on your setting in the pegging setup pages. In the IN_PEGGING table, if the pegged quantity (QTY_PEGGED field) is equal to the putaway pegged quantity (QTY_COMPLETE field) then the peg status in this table is updated to *complete*. If either the demand or supply order has no more open peg quantity, then the peg status on the order itself is also updated to *complete*.

If the notification framework has been defined for the Message Dashboard, then a notification is sent to the owner of the peg when the stock completes putaway in the inventory business unit.

4. The sales order is fulfilled and shipped to the customer.

This process flow diagram illustrates pegging a sales order to a requisition or purchase order:



Pegging a sales order to a requisition or purchase order

The sequence of events in the process flow when pegging a sales order to a requisition or purchase order is:

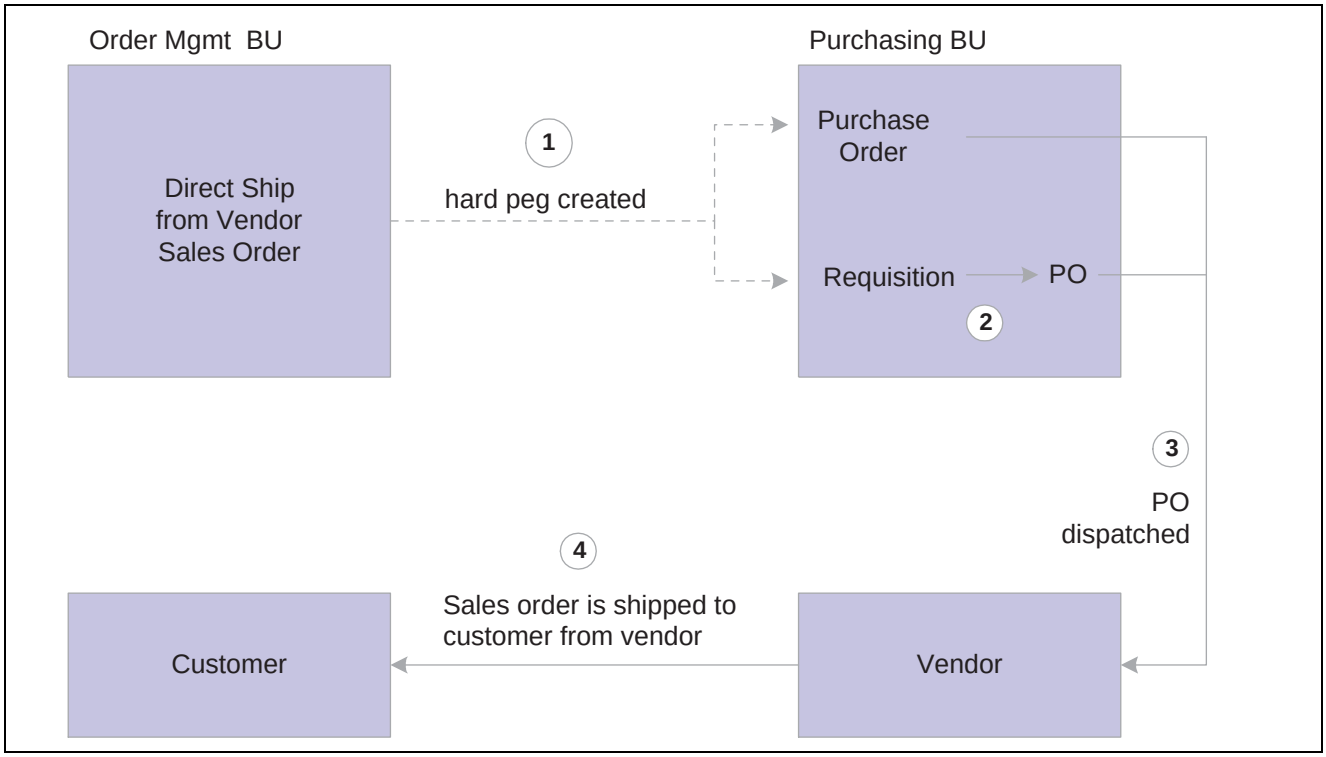
1. Peg a sales order by using the Alternate Sources of Supply page to:
   - Create a *soft peg* between the sales order and an existing requisition or purchase order.
   - Create a new requisition or purchase order to fulfill the sales order. This is a *hard peg*. The purchase order is created when the sales order is saved. The requisition is created by the Requisition Loader process.

   When the sales order is saved it is inserted into the IN_DEMAND table in PeopleSoft Inventory.
2. If a requisition was created, it goes through the sourcing processes in PeopleSoft Purchasing and is sourced to an interunit stock request or a purchase order or both. The interunit stock request is created in the sending inventory business unit.

3. If a purchase order was created, it is dispatched to the vendor.
4. The vendor ships the stock and it is received into the purchasing business unit. If the notification framework has been defined for the Message Dashboard, then a notification is sent to the owner of the peg when stock is received into the purchasing business unit.
5. The stock from the vendor or the sending inventory business unit (or both) is putaway in the destination inventory business unit. During putaway, the stock is soft-reserved or optionally allocated to the outgoing sales order based on your setting in the pegging setup pages. In the IN_PEGGING table, if the pegged quantity (QTY_PEGGED field) is equal to the putaway pegged quantity (QTY_COMPLETE field) then the peg status in this table is updated to *complete*. If either the demand or supply order has no more open peg quantity, then the peg status on the order itself is also updated to *complete*.

   If the notification framework has been defined for the Message Dashboard, then a notification is sent to the owner of the peg when the stock completes putaway in the inventory business unit.
6. The sales order is fulfilled and shipped to the customer.

This process flow diagram illustrates hard pegging a direct ship from vendor sales order to a requisition or purchase order:

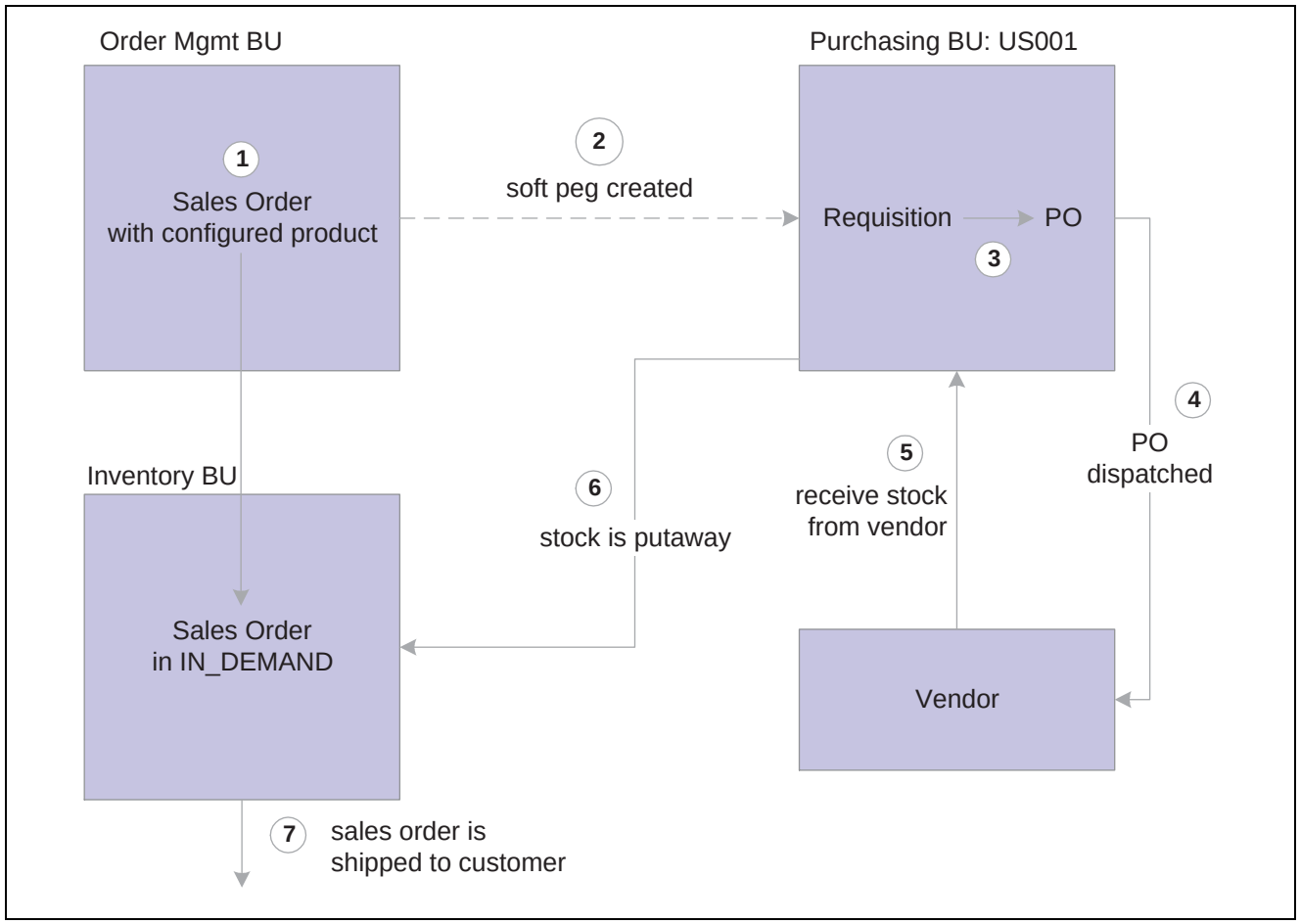


Hard pegging a direct ship from vendor sales order

The sequence of events in the process flow for a direct ship from vendor sales order is:

1. Use the Alternate Sources of Supply page to create a new requisition or purchase order to fulfill the sales order. This is a *hard peg*. The purchase order is created when the sales order is saved. The requisition is created by the Requisition Loader process.
2. If a requisition was created, it goes through the sourcing processes in PeopleSoft Purchasing and is sourced to a purchase order.
3. The purchase order is dispatched to the vendor.
4. The vendor ships the stock directly to the customer.

This process flow diagram illustrates pegging a sales order with a configured product to a requisition in PeopleSoft Purchasing:



Pegging a sales order with a configured product to a requisition

The sequence of events in the process flow for a configured product sourced from PeopleSoft Purchasing is:

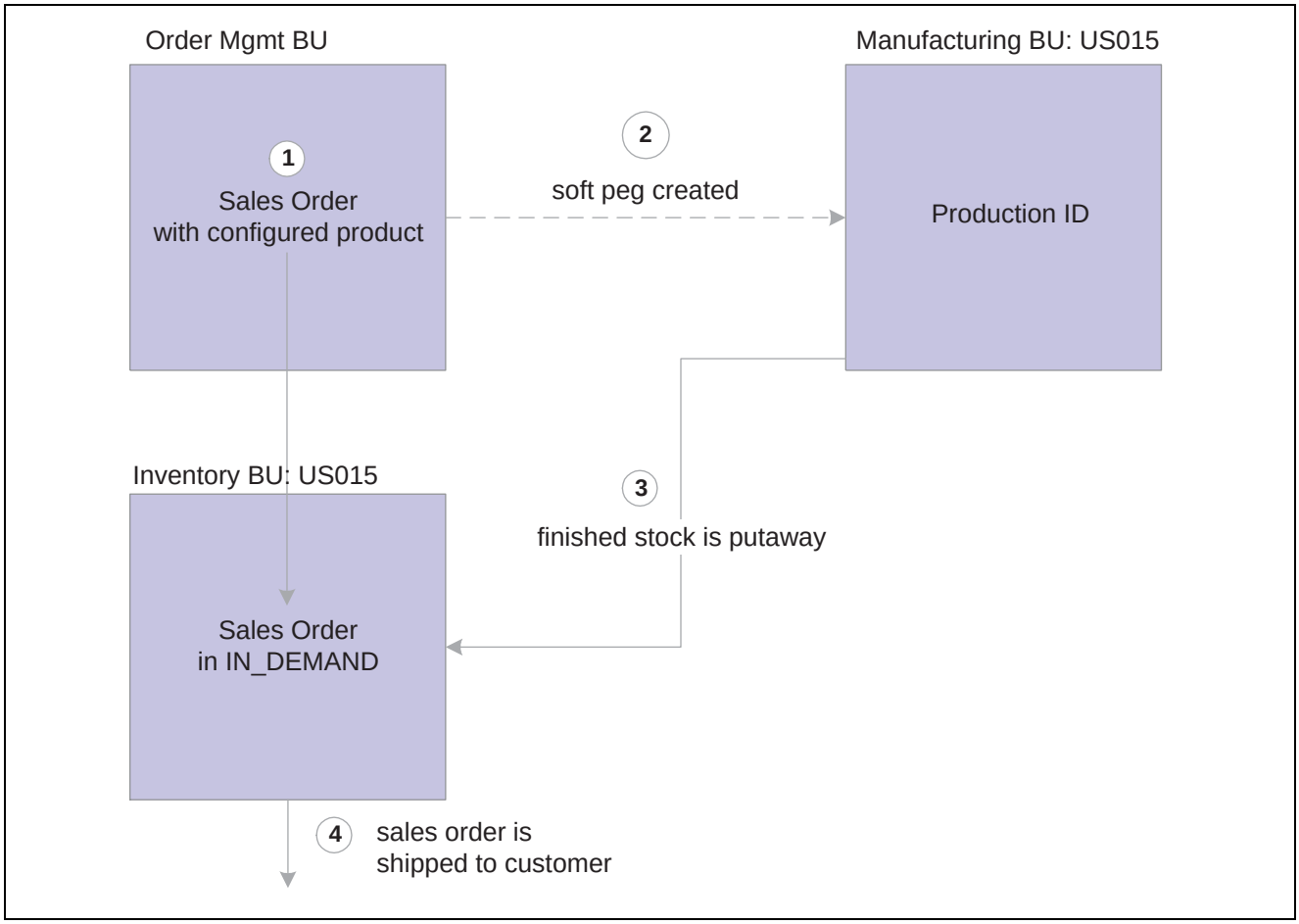
1. A sales order with a configured product is created and saved. The demand line contains a configuration code generated by your PeopleSoft Product Configurator setup. This configuration code uniquely identifies the exact configuration for this product. The configured item is also lot-controlled. When the sales order is saved, it is inserted into the IN_DEMAND table in PeopleSoft Inventory.
2. The Requisition Loader process in PeopleSoft Purchasing, creates a requisition to fulfill the sales order. This requisition contains the configuration code. The Requisition Loader process also creates a soft peg between the sales order and the requisition. This soft peg is stored in IN_PEGGING and its related tables.
3. The requisition goes through the sourcing processes in PeopleSoft Purchasing and is sourced to a purchase order.
4. The purchase order is dispatched to the vendor.
5. The vendor ships the stock and it is received into the purchasing business unit. If the notification framework has been defined for the Message Dashboard, then a notification is sent to the owner of the peg when stock is received into the purchasing business unit.
6. The stock from the vendor is putaway in the inventory business unit. During putaway, the stock is lot-allocated to the outgoing sales order. Lot allocation reserves the incoming stock to the sales order at the business unit, item, lot, and storage location levels. In the IN_PEGGING table, if the pegged quantity

(*QTY_PEGGED* field) is equal to the putaway pegged quantity (QTY_COMPLETE field) then the peg status in this table is updated to *complete*. If either the demand or supply order has no more open peg quantity, then the peg status on the order itself is also updated to *complete*.

If the notification framework has been defined for the Message Dashboard, then a notification is sent to the owner of the peg when the stock completes putaway in the inventory business unit.

7. The sales order is fulfilled and shipped to the customer.

This process flow diagram illustrates pegging a sales order with a configured product to a production ID in PeopleSoft Manufacturing when the *ship from* inventory business unit is the same on the sales order and the production ID. In other words, the stock is shipped to the customer from the manufacturing finished goods warehouse.



Pegging sales order with a configured product to production ID when ship from unit is the same

The sequence of events in the process flow for a sales order with a configured product to a production ID when the *ship from* inventory business unit is the same on both transactions is:

1. A sales order with a configured product is created and saved. The demand line contains a configuration code generated by your PeopleSoft Product Configurator setup. This configuration code uniquely identifies the exact configuration for this product. The configured item is also lot-controlled. When the sales order is saved, it is inserted into the IN_DEMAND table in PeopleSoft Inventory.
2. The Production Request process in PeopleSoft Product Configurator, creates a production ID to fulfill the sales order. This production ID in PeopleSoft Manufacturing contains the configuration code. The Production Request process also creates a soft peg between the sales order and the production ID. This soft peg is stored in IN_PEGGING and its related tables.

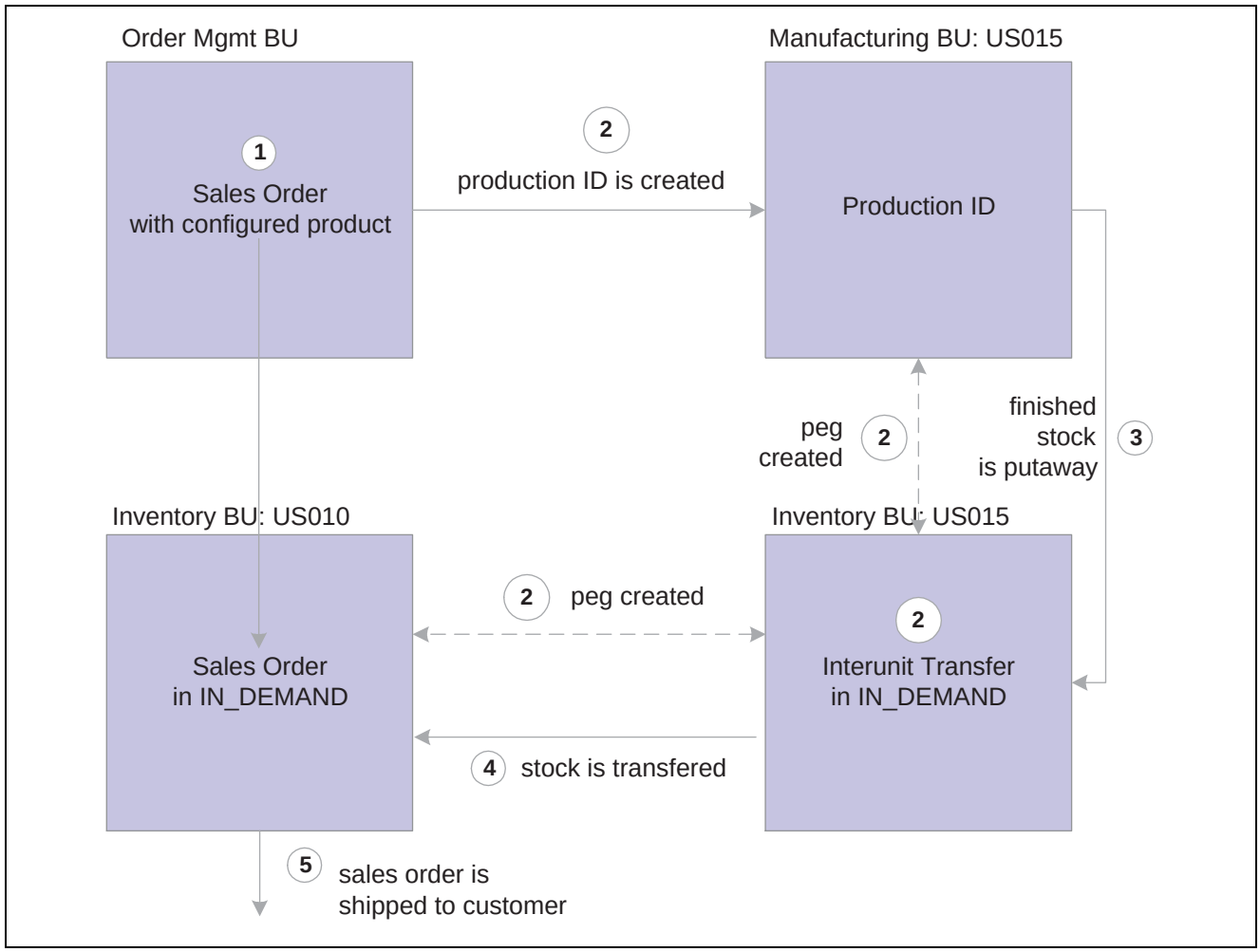
3. The production is completed and the output placed in the inventory business unit. During putaway, the stock is lot-allocated to the outgoing sales order. Lot allocation reserves the incoming stock to the sales order at the business-unit, item, lot, and storage location levels. The peg status is changed to *complete* in the IN_PEGGING record and in the supply and demand transactions if either:

   - The production order is closed.
   - All the pegged quantity has been received and putaway (QTY_COMPLETE=QTY_PEGGED).

   If the notification framework has been defined for the Message Dashboard, then a notification is sent to the owner of the peg when the stock completes putaway in the inventory business unit.

4. The sales order is fulfilled and shipped to the customer.

This process flow diagram illustrates pegging a sales order with a configured product to a production ID in PeopleSoft Manufacturing when the *ship from* inventory business unit is different between the sales order and the production ID. In other words, the stock is shipped to the customer from a different warehouse or distribution center than the manufacturing finished goods warehouse.



Pegging sales order with a configured product to production ID when ship from unit is different

The sequence of events in the process flow for a sales order with a configured product to a production ID when the *ship from* inventory business units are different between the demand and supply transactions is:

1. A sales order with a configured product is created and saved. The demand line contains a configuration code generated by your PeopleSoft Product Configurator setup. This configuration code uniquely identifies

the exact configuration for this product. The configured item is also lot-controlled. When the sales order is saved, it is inserted into the IN_DEMAND table in PeopleSoft Inventory for the *ship from* inventory business unit on the sales order.

2. The Production Request process in PeopleSoft Product Configurator:
    a. Creates a production ID to fulfill the sales order. This production ID in PeopleSoft Manufacturing contains the configuration code.
    b. Creates an interunit transfer (material stock request) to move the finished stock from the production IDs *ship from* inventory business unit to the sales order's *ship from* inventory business unit. This stock request is placed in the IN_DEMAND table in PeopleSoft Inventory.
    c. Creates two soft pegs. One peg between the production ID and the interunit transfer and another peg between the interunit transfer and the sales order. These soft pegs are stored in IN_PEGGING and its related tables.
3. The production is completed and the output placed in the inventory business unit with the same name as the manufacturing business unit; this is the production IDs *ship from* inventory business unit. During putaway, the stock is lot-allocated to the outgoing interunit transfer. Lot allocation reserves the incoming stock to the interunit transfer at the business-unit, item, lot, and storage location levels. The peg status is changed to *complete* if either:
    - The production order is closed.
    - All the pegged quantity has been received and putaway (QTY_COMPLETE=QTY_PEGGED).

    If the notification framework has been defined for the Message Dashboard, then a notification is sent to the owner of the peg when the stock completes putaway in the inventory business unit.
4. The interunit transfer is used to ship the stock from the sending business unit to the destination business unit. When the stock is putaway in the sales order's *ship from* inventory business unit, the stock is lot-allocated to the outgoing sales order. Lot allocation reserves the incoming stock to the sales order at the business-unit, item, lot, and storage location levels. The peg status is changed to *complete* in the IN_PEGGING record.
5. The sales order is fulfilled and shipped to the customer.

See Also

PeopleSoft Enterprise Order Management 8.9 PeopleBook, "Setting Up Alternate Sources of Supply"

Pegging in PeopleSoft Maintenance Management

A work order in PeopleSoft Maintenance Management can be pegged as demand to an interunit transfers (supply-side) in PeopleSoft Inventory and requisitions or purchase orders from PeopleSoft Purchasing. Work orders can only use soft pegs. Pegged supply received and putaway in an inventory business unit cannot be reserved or allocated if the pegged demand is a work order. If you are working with a non-inventory item ID or description-only item, then the method for pegging a work order differs from an order using an inventory ID.

A peg for a work order can by created using the:

- (inventory items only) Pegging Workbench.

  The workbench displays work order tasks with inventory items to be pegged to. In addition, you can peg a requisition or purchase order to a work order task that you created on the workbench using the Add Work Order Material link.
- (inventory items only) Work Order-Schedules page in PeopleSoft Maintenance Management.

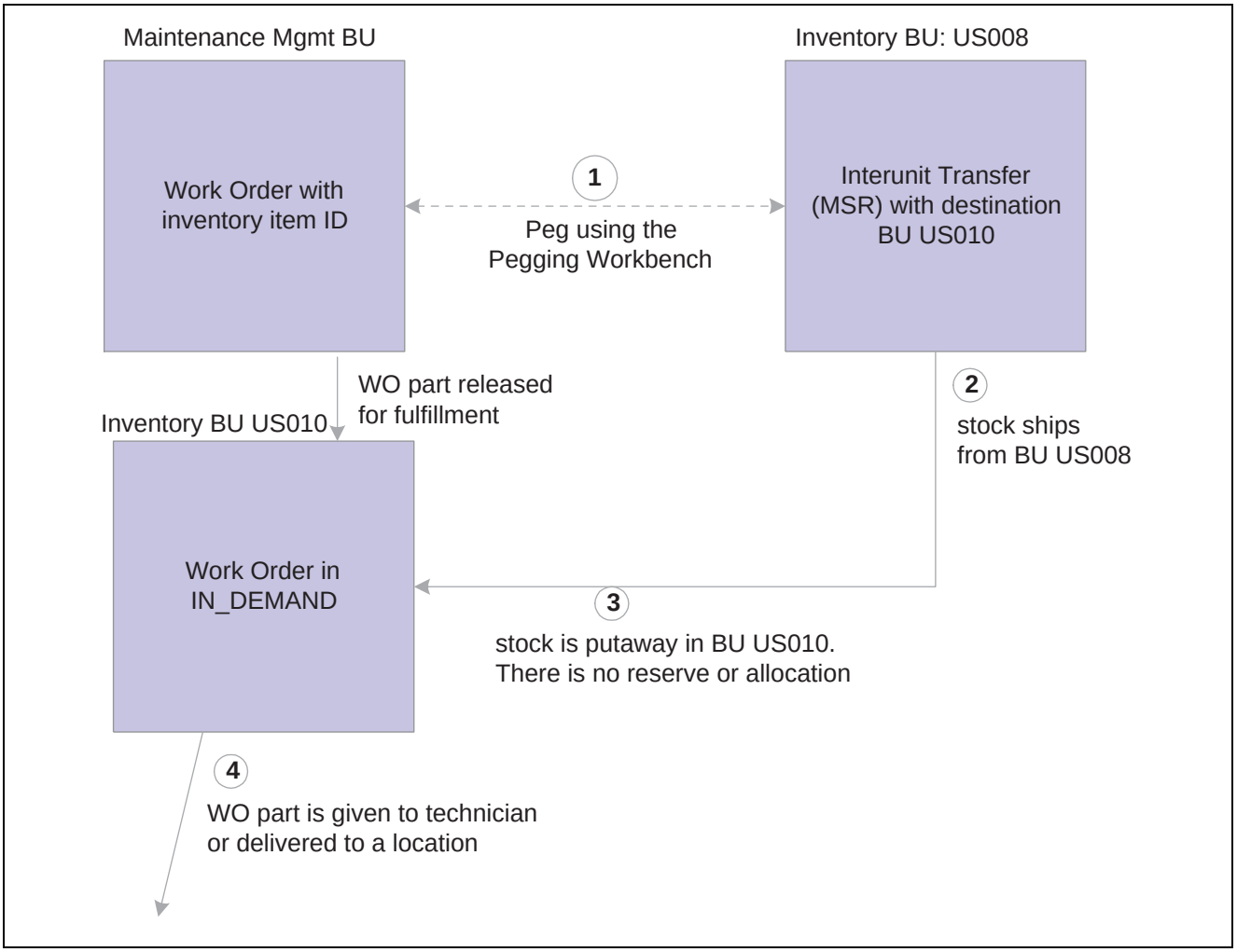
- Add/Update Requisitions component in PeopleSoft Purchasing.
- Add/Update POs component in PeopleSoft Purchasing.
- Add/Update Express POs component in PeopleSoft Purchasing.
- Create Requisitions component in PeopleSoft eProcurement.

You can access peg chains and create new peg chains by accessing the Pegging Workbench or view peg chains by accessing the Pegging Inquiry page from the Work Order - Schedules page in PeopleSoft Maintenance Management.

Note. The link to the Pegging Workbench is only visible if the User Security page gives access to the user ID.

Pegging a Work Order with an Inventory Item ID

This process flow diagram illustrates pegging a work order with an inventory item ID to an incoming interunit transfers:



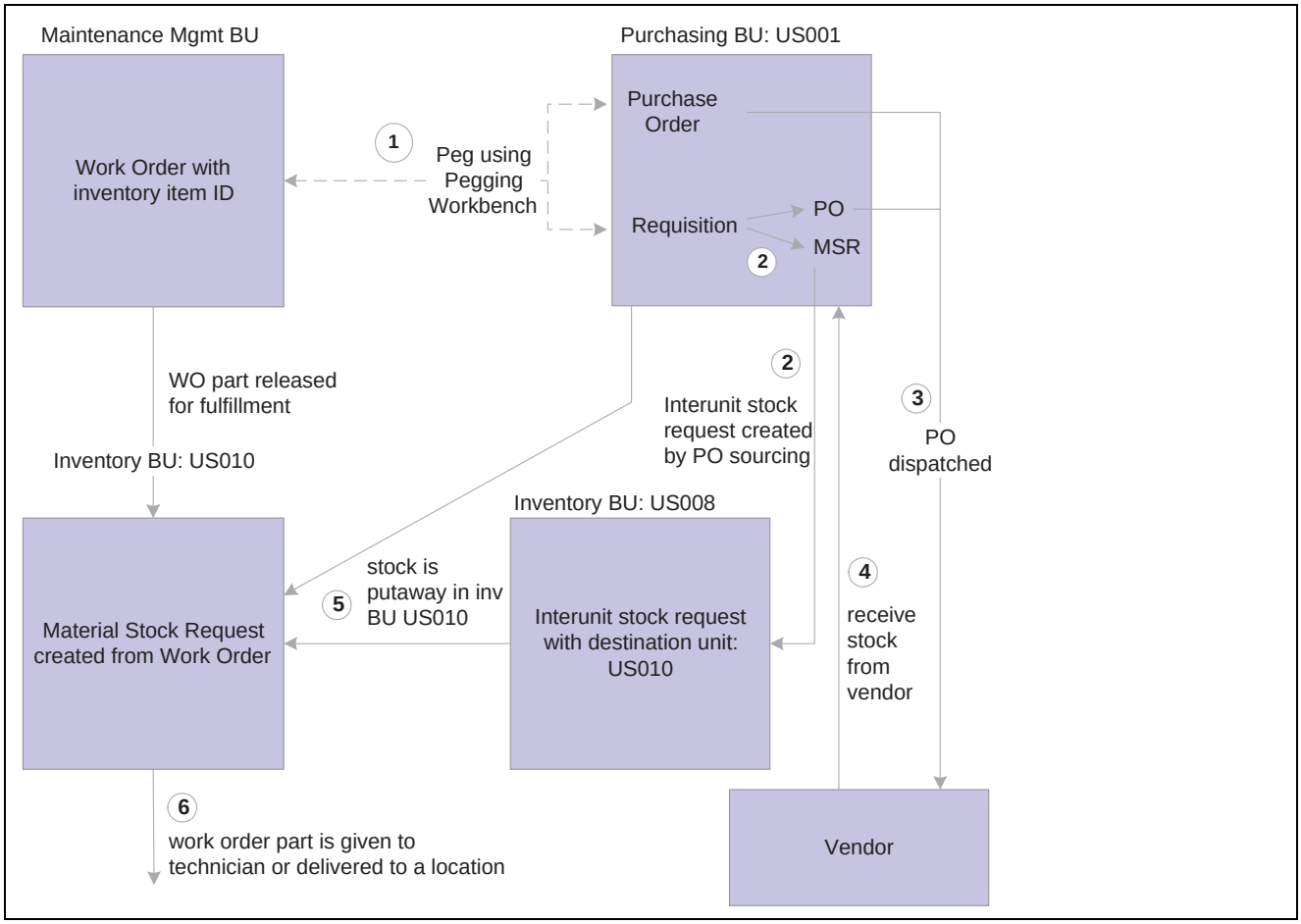
Pegging a work order to an interunit transfer (supply-side)

The sequence of events in the process flow when pegging a work order with an inventory item ID to an incoming interunit transfers is:

1. Peg is created using the Pegging Workbench. When a work order part is pegged, it is placed in the IN_DEMAND table for fulfillment, if it is not already there. The interunit transfer's destination business unit must match the work order's inventory business unit.
2. The supply-side interunit transfer is shipped from the sending business unit.
3. The supply-side interunit transfer is putaway in the destination business unit. During putaway, the stock can not be soft-reserved or allocated. In the IN_PEGGING table, if the pegged quantity (QTY_PEGGED field) is equal to the putaway pegged quantity (QTY_COMPLETE field) then the peg status in this table is updated to *complete*. If either the demand or supply order has no more open peg quantity, then the peg status on the order itself is also updated to *complete*.

   If the notification framework has been defined for the Message Dashboard, then a notification is sent to the owner of the peg when the stock completes putaway in the Inventory business unit.
4. The work order is fulfilled in PeopleSoft Inventory using the picking or issue features for work orders in the Fulfill Work Orders menu. The work order part is given to a technician or delivered to a location.

This process flow diagram illustrates pegging a work order with an inventory item ID to a requisition or purchase order:



Pegging a work order with an inventory item ID to a requisition or purchase order

The sequence of events in the process flow when pegging a work order with an inventory item ID to a requisition or purchase order is:

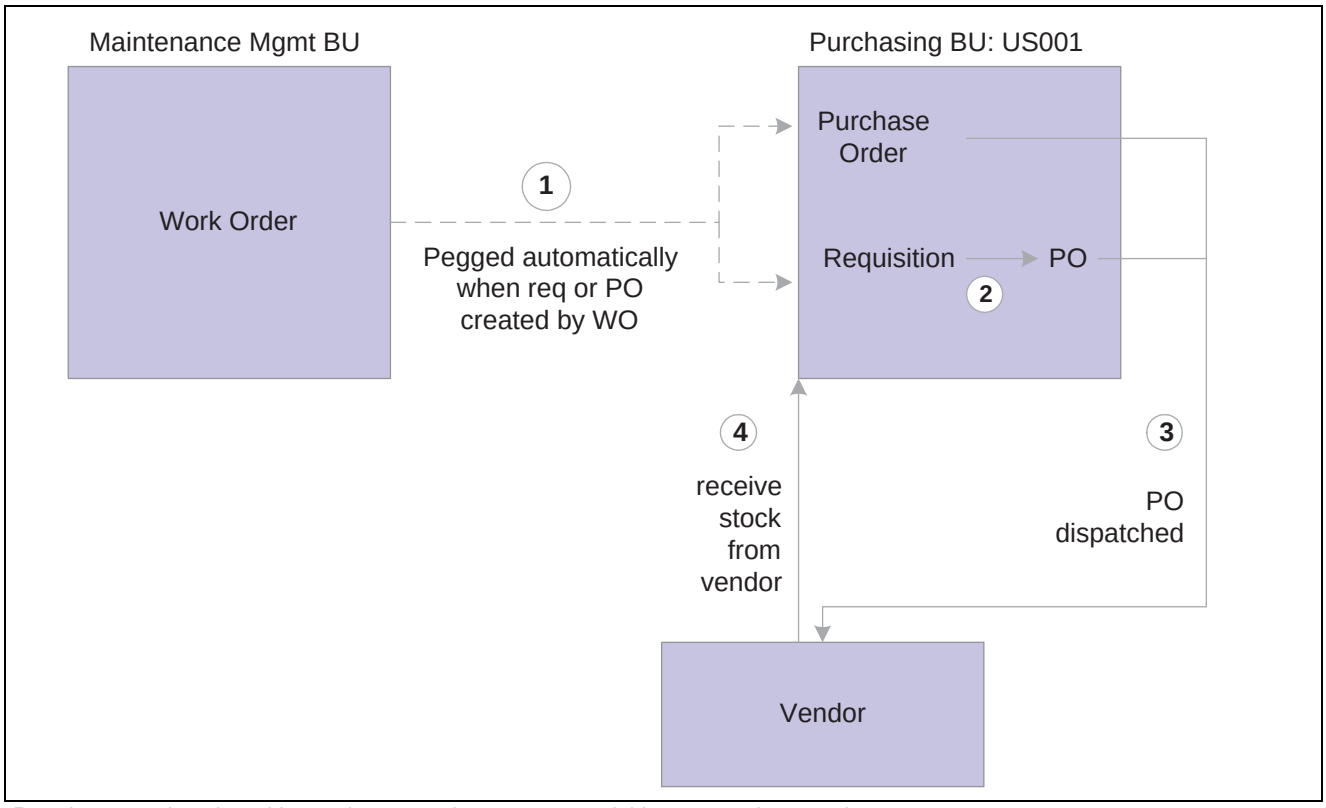
1. Peg is created using the Pegging Workbench. When a work order part is pegged, it is placed in the IN_DEMAND table for fulfillment, if it is not already there. A work order is pegged to a requisition or purchase order.
2. The requisition goes through the PO sourcing module and is sourced to an interunit stock request or a purchase order or both. The interunit stock request is created in the sending inventory business unit.
3. The purchase order is dispatched to the vendor.
4. The vendor ships the stock and it is received into the Purchasing business unit. If the notification framework has been defined for the Message Dashboard, then a notification is sent to the owner of the peg when stock is received into the Purchasing business unit.
5. The stock from the vendor or the sending inventory business unit is putaway in the destination inventory business unit. During putaway, the stock can not be soft-reserved or allocated. In the IN_PEGGING table, if the pegged quantity (QTY_PEGGED field) is equal to the putaway pegged quantity (QTY_COMPLETE field) then the peg status in this table is updated to *complete*. If either the demand or supply order has no more open peg quantity, then the peg status on the order itself is also updated to *complete*.

   If the notification framework has been defined for the Message Dashboard, then a notification is sent to the owner of the peg when the stock completes putaway in the Inventory business unit.
6. The work order part is fulfilled in PeopleSoft Inventory using the picking or issue features for work orders in the Fulfill Work Orders menu. The work order part is given to a technician or delivered to a location.

Pegging a Work Order with a Non-Inventory Item

When using a non-inventory item ID or a description-only item on a work order line, you cannot peg to a materials stock request (interunit transfer, supply-side) or a production ID. You can peg to a requisition or purchase order. You can create the peg from the PeopleSoft Maintenance Management side or the PeopleSoft Purchasing side. The Pegging Workbench cannot be used to peg a non-inventory item ID or a description-only item. The Pegging Inquiry component can be used to view peg chains to non-inventory item ID or a description-only items.

This process flow diagram illustrates pegging, from PeopleSoft Maintenance Management, a work order that is using a non-inventory item ID or a description-only item:

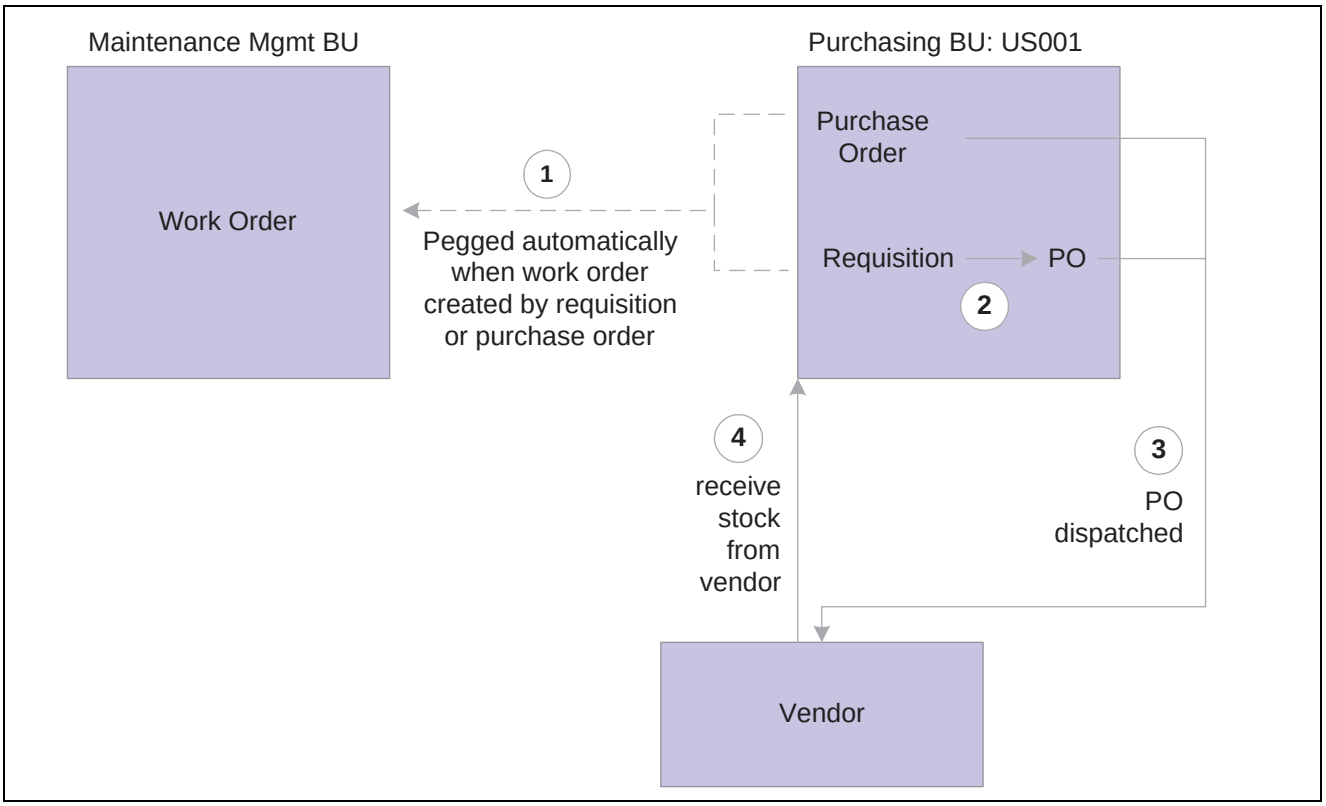


Pegging a work order with non-inventory items to a requisition or purchase order

The sequence of events in the process flow is:

1. Using the Work Order - Schedules page, select the Purchase/On-Hand link, add a non-inventory item or description-only item, and then:
   - Select the Load Requisition button to place the work order line in a staging table where the Requisition Loader process will retrieve it and create a requisition in PeopleSoft Purchasing.
   - Select the Load Purchase Order button to place the work order line in a staging table where the Create Purchase Order process will retrieve it and create a purchase order in PeopleSoft Purchasing.
2. Use the sourcing module in PeopleSoft Purchasing to build a purchase order from the requisition. The requisition cannot be placed on a material stock request since there is no inventory item ID.
3. The purchase order is dispatched to the vendor.
4. If receiving is required, then the parts are received into the purchasing business unit. If receiving is not required, then the peg status is updated to *complete* when the purchase order is closed.

This process flow diagram illustrates pegging, from PeopleSoft Purchasing, a work order that using a non-inventory item ID or a description-only item:



Pegging from PeopleSoft Purchasing with a non-inventory item to a work order

The sequence of events in the process flow when pegging from PeopleSoft Purchasing to a work order is:

1. Create a requisition or purchase order line:
   - In the Add/Update Requisitions component in PeopleSoft Purchasing, add a non-inventory item ID or a description-only item, select the Schedule icon, select the Maintenance WO tab. Enter the Maintenance WO business unit, work order, task number, resource type, and resource line number. The work order ID and task must already exist in PeopleSoft Maintenance Management, however the resource line number can be added here if needed. If the item does not exist on the work order and you want to add it, then leave the resource line number at zero. When the requisition is saved, a peg is automatically created between the requisition line and the work order.
   - In the Add/Update Purchase Order component in PeopleSoft Purchasing, add a non-inventory item ID or a description-only item, select the Schedule icon, select the Maintenance WO tab. Enter the Maintenance WO business unit, work order, task number, resource type, and resource line number. The work order ID and task must already exist in PeopleSoft Maintenance Management, however the resource line number can be added here if needed. If the item does not exist on the work order and you want to add it, then leave the resource line number at zero. When the purchase order is saved, a peg is automatically created between the purchase order line and the work order.
2. For a requisition, use the sourcing module in PeopleSoft Purchasing to source the requisition into a purchase order. The requisition cannot be placed on a material stock request since there is no inventory item ID.
3. The purchase order is dispatched to the vendor.
4. If receiving is required, then the parts are received into the purchasing business unit. If receiving is not required, then the peg status is updated to *complete* when the purchase order is closed.

Pegging in PeopleSoft Purchasing

A requisitions or purchase orders from PeopleSoft Purchasing can be pegged as supply to any demand order type: stock requests and transfer demand in PeopleSoft Inventory, sales orders in PeopleSoft Order Management, and work orders in PeopleSoft Maintenance Management.

A peg to a requisition or purchase order can by created using the:

- Pegging Workbench. With the workbench, you can create a soft peg to any demand order type.
- The schedule level of the Maintain Purchase Order component.
- The schedule level of the Maintain Requisitions component.
- The distribution level of the Express Purchase Order page.

You can access peg chains and create new peg chains by accessing the Pegging Workbench or view peg chains by accessing the Pegging Inquiry page from PeopleSoft Purchasing, including:

- The schedule level of the Maintain Purchase Order component.
- The schedule level of the Maintain Requisitions component.
- The Maintain Receipts - Receiving page.

Note. The link to the Pegging Workbench is only visible if the User Security page gives access to the user ID.

To view process flow diagrams about pegging requisitions and purchase orders, see the demand-side sections in this chapter about pegging to PeopleSoft Inventory, Order Management, and Maintenance Management.

See Also

Chapter 4, “Pegging Supply and Demand,” Pegging in PeopleSoft Inventory, page 66

Chapter 4, “Pegging Supply and Demand,” Pegging in PeopleSoft Order Management, page 72

Chapter 4, “Pegging Supply and Demand,” Pegging in PeopleSoft Maintenance Management, page 80

Pegging in PeopleSoft Manufacturing

A production ID from PeopleSoft Manufacturing can be pegged as supply to stock requests and transfer demand in PeopleSoft Inventory and to sales orders in PeopleSoft Order Management. The following rules apply when pegging production:

- You can peg to a production ID but not a production schedule.
- You can only peg to the primary output of a production ID, not co-products or by-products.
- Once a production ID has been pegged, you cannot split it.

You can access peg chains and create new peg chains by accessing the Pegging Workbench or view peg chains by accessing the Pegging Inquiry page from the Maintain PIDs - Production ID Outputs page in PeopleSoft Manufacturing. In addition, you can access the Pegging Inquiry page from:

- Record Completions and Scrap component
- The PID/Schedule inquiry component

- The Review Dispatch List inquiry component

Note. The link to the Pegging Workbench is only visible if the User Security page gives access to the user ID.

Pegging chains are also visible on the Production report, Print Production documents and Dispatch List report.

To view process flow diagrams about pegging production IDs, see the demand-side sections in this chapter about pegging to PeopleSoft Inventory and PeopleSoft Order Management.

See Also

Chapter 4, "Pegging Supply and Demand," Pegging in PeopleSoft Inventory, page 66

Chapter 4, "Pegging Supply and Demand," Pegging in PeopleSoft Order Management, page 72

Setting Up Pegging

Pegging is set up at the:

- Business-unit level.
- Item level.
- User level.
- Material storage location level.
- Notification framework.

Pages Used to Set Up Pegging

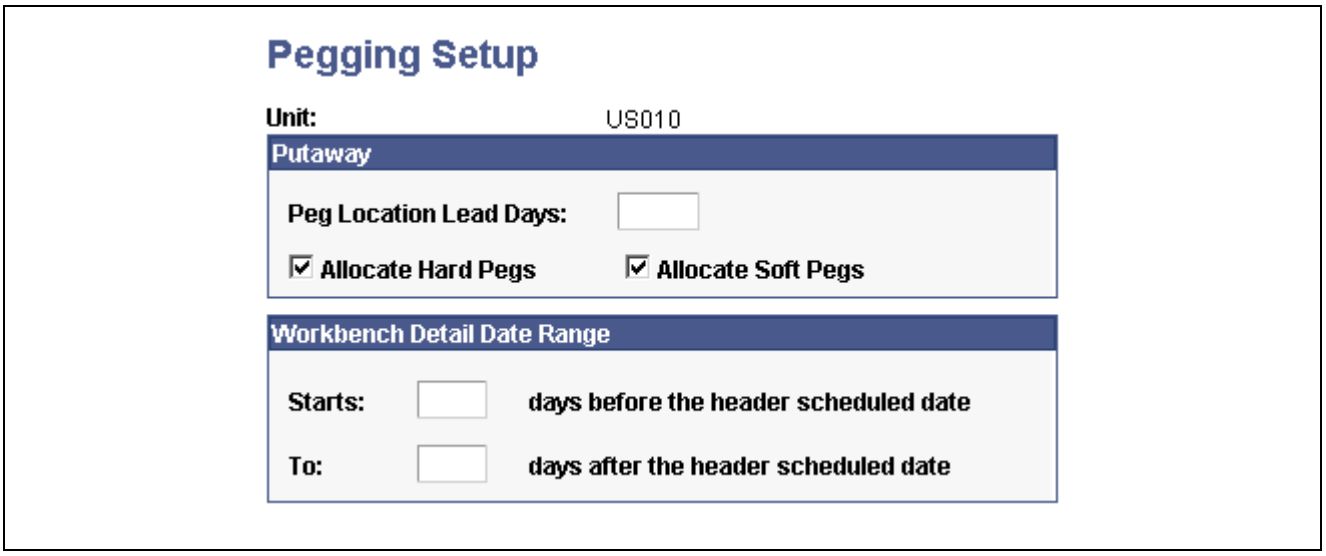
Page Name	Object Name	Navigation	Usage
Pegging Setup	IN_PEG_SETUP	Inventory, Order Pegging, Business Unit Setup	Define pegging attributes for the PeopleSoft Inventory business unit.
Pegging Item Setup	IN_PEG_IT_SETUP	Inventory, Order Pegging, Item Setup	Define pegging attributes for the item and business-unit combination. This page only needs to be used if the item varies from the business-unit level setup.
User Security	IN_PEG_USER_SEC	Inventory, Order Pegging, User Security	Based on the User ID, select the type of supply and demand that the user can work with.

Page Name	Object Name	Navigation	Usage
Default Putaway Locations	DEFAULT_LOC_INV	Inventory, Maintain Storage Locations, Default Putaway Locations	Define a default material storage location to place pegged supply quantities when received into the inventory business unit. This pegging location is defined for the inventory business unit and item ID combination. You can establish material storage locations for both owned and non-owned stock putaways. The system uses this location if no material storage location is specified on the putaway transaction.
Default Pegging Putaway Location Details	DFLT_PEG_LOC_INV	Inventory, Maintain Storage Locations, Default Pegging Locations	Define a default material storage location to place pegged supply quantities when received into the inventory business unit. This pegging location is defined for the inventory business unit level. Both an owned and non-owned material storage location can be defined for a business unit. The system uses this location if no material storage location is specified on the Default Putaway Locations page.
Setup Fulfillment - Shipping	OF_SETUP6_INV	Inventory, Fulfill Stock Orders, Fulfillment Rules, Setup Fulfillment, Shipping	At the business-unit level, define the default pegging location as the picking material storage location for pegged orders.
Setup Item Fulfillment - Shipping Options	OF_SETUP_IT2_INV	Inventory, Fulfill Stock Orders, Fulfillment Rules, Setup Item Fulfillment, Shipping Options	At the item level, define the default pegging location as the picking material storage location for pegged orders.

Defining Pegging Attributes for the Inventory Business Unit

To set up pegging attributes at the inventory business-unit level, use the Setup Pegging by Business Unit component.

Access the Pegging Setup page.



Pegging Setup page

Unit Enter the Inventory business unit.

Peg Location Lead Days Enter the number of lead days for pegged items in this inventory business unit. When the putaway processes receive pegged supply quantities, the peg location lead days are used to determine where to place the stock. The system adds the peg location lead days to today's date and compares the result to the scheduled ship date of the outgoing pegged demand order. If the order is within the lead days window, then the pegged supply quantity is received (putaway) into the pegged material storage location specified. If the order is not within the lead days window, the pegged supply quantity is received into the standard material storage location determined by the putaway processes.

Allocate Hard Pegs Select to allocate any hard-pegged receipts to the outgoing demand line at the time of putaway. A hard allocation reserves stock at a specific material storage location within the inventory business unit to satisfy an outgoing order line.

Clear this check box to reserve any hard-pegged receipts to the outgoing demand line at the time of putaway. A soft reservation reserves stock at the inventory business unit level to satisfy an outgoing order line. The specific material storage location for picking and shipping the stock is not reserved.

Allocate Soft Pegs Select to allocate any soft-pegged receipts to the outgoing demand line at the time of putaway. A hard allocation reserves stock at a specific material storage location within the inventory business unit to satisfy an outgoing order line

Clear this check box to reserve any soft-pegged receipts to the outgoing demand line at the time of putaway. A soft reservation reserves stock at the inventory business unit level to satisfy an outgoing order line. The specific material storage location for picking and shipping the stock is not reserved.

Workbench Detail Date Range

Enter values to determine the time window displayed on the Pegging Workbench; this is used to limit the number of rows returned in the workbench search. These values only apply to unpegged supply or demand transactions.

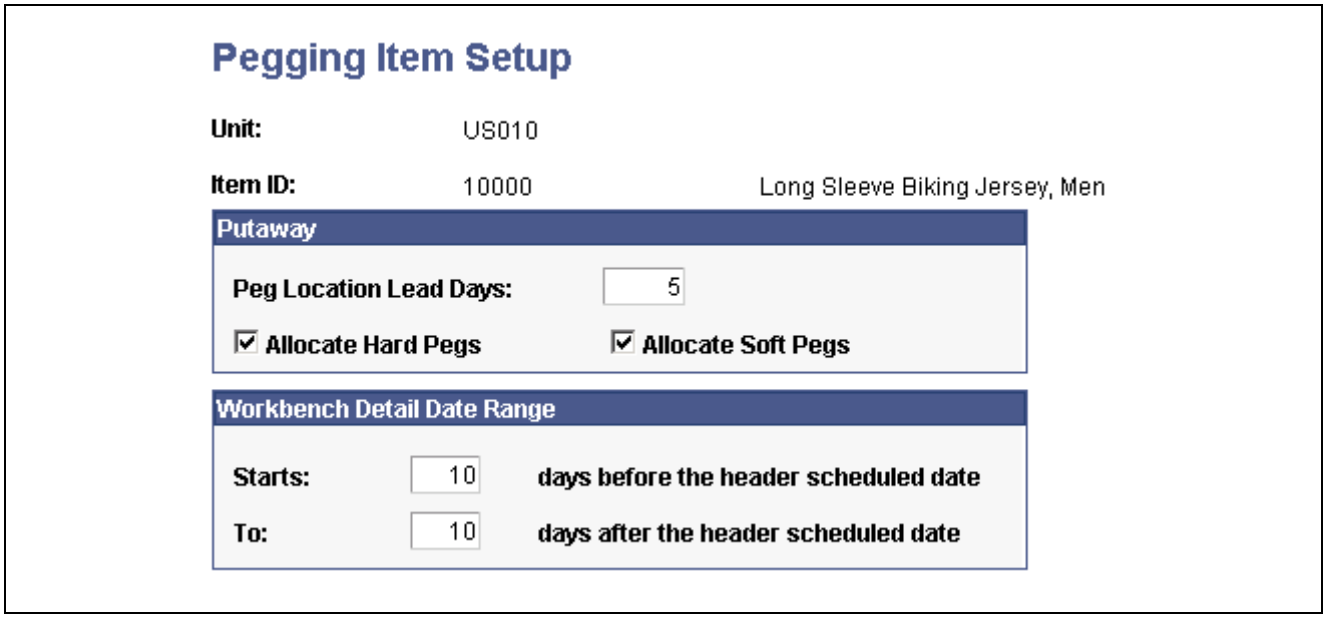
Starts Enter the number of days prior to the demand line's scheduled shipment date or prior to the supply line's receipt date that should be displayed. The system subtracts the *Start days* from the demand or supply date and selects any supply/demand to be received/shipped within this window.

To Enter the number of days past the demand line's scheduled shipment date or past the supply line's receipt date that should be displayed. The system adds the *To days* to the demand or supply date and selects any supply/demand to be received/shipped within this window.

Defining Pegging Attributes for the Item and Business-unit Combination

To set up pegging attributes at the item level, use the Pegging Attributes by Item component.

Access the Pegging Item Setup page.



Pegging Item Setup page

Define pegging attributes for a particular item ID to override the same attributes at the business-unit level.

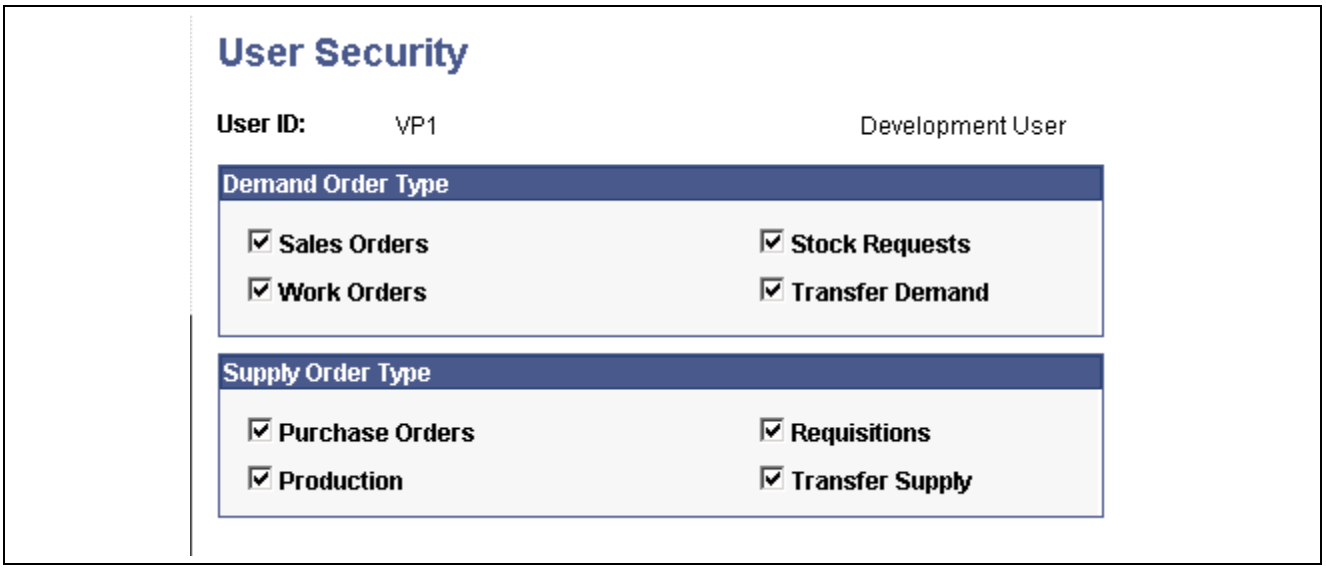
For field definitions, see the *Defining Pegging Attributes for the Inventory Business Unit* section above.

See Chapter 4, "Pegging Supply and Demand," Defining Pegging Attributes for the Inventory Business Unit, page 88.

Defining User Security

To set up user security for pegging, use the Pegging User Security component.

Access the User Security page.



User Security page

This page enables you to set up pegging security by user. The user must be defined within the User Security page in order to peg demand or supply.

For each component where pegging is enabled, the system checks the user ID security setup. If the relevant order type is selected, then the system displays the link within that component. For example, if the user is in the Order Entry Form in PeopleSoft Order Management, the link Peg to Demand is available only if the Sales Orders check box has been selected for the user on the User Security page. In addition, once the link is taken, the Pegging Workbench filters the supply or demand based on the check boxes selected on the User Security page. For example, if a user can peg to all supply order types but production, then only purchase orders, requisitions, and interunit transfers would be available to peg to in the Pegging Workbench.

Demand Order Type

Select the demand side for pegging.

Sales Orders Select to enable this user ID to peg sales orders from PeopleSoft Order Management.

Stock Requests Select to enable this user ID to peg stock requests in PeopleSoft Inventory.

Work Orders Select to enable this user ID to peg work orders from PeopleSoft Maintenance Management.

Transfer Demand Select to enable this user ID to peg the outgoing interunit stock requests. Interunit stock requests in PeopleSoft Inventory are used to transfer stock from one inventory business unit to another.

Supply Order Type

Select the supply side for pegging.

Purchase Orders Select to enable this user ID to peg to purchase orders in PeopleSoft Purchasing.

Requisitions Select to enable this user ID to peg to requisitions in PeopleSoft Purchasing.

Production	Select to enable this user ID to peg to production IDs in PeopleSoft Manufacturing.
Transfer Supply	Select to enable this user ID to peg to interunit stock requests as incoming supply. Interunit stock requests in PeopleSoft Inventory are used to transfer stock from one inventory business unit to another.

Setting Up the Putaway Location for Pegged Supply

When pegged supply arrives at the Inventory business unit for putaway, the system must decide where to place the stock. A separate material storage location can be defined to prevent pegged supply from combining with incoming supply available to fulfill other orders. You can establish default pegging locations for the putaway of both owned and non-owned stock.

Note. When choosing a default pegging location, the system prevents you from selecting a materials storage location that is defined as non-open, non-nettable, WIP, or cross-docked.

If the pegged order (outgoing demand) is scheduled to ship within the pegging lead days window, then the pegged supply quantity is received (putaway) into the default pegging location specified. If the pegged order is not within the pegging lead days window, the pegged supply quantity is received into the standard material storage location determined by the putaway processes.

When pegged supply is received into PeopleSoft Inventory, the putaway processes:

1. Places the stock in the material storage location specified on the putaway transaction.
2. If no location is specified on the putaway transaction, then the system looks to the Default Putaway Locations page to determine if a default pegging location has been specified for the inventory business unit and item ID combination.
3. If no location is specified on the Default Putaway Locations page, then the system looks to the Default Pegging Putaway Location Details page to determine if a default pegging location has been specified for the inventory business unit.

For demand lines with a pegged quantity that was reserved during the Complete Putaway process, the Order Release process can now allocate stock from a specific material storage location. If you choose to create an allocation, the Order Release process attempts to find stock to allocate to a pegged quantity in:

1. The default pegging location defined on the Default Putaway Locations page for the inventory business unit and item ID combination.
2. If no location is specified on the Default Putaway Locations page or no stock is available in the location, then the system looks to the Default Pegging Putaway Location Details page to determine if a default pegging location has been specified for the inventory business unit.
3. If there is no default pegging location or no stock available in the location, then the system uses the picking method specified on the Order Release process page.

Keep in mind that pegged quantities that were allocated during the Complete Putaway process will keep that allocation when released for picking.

See Also

PeopleSoft Enterprise Inventory 8.9 PeopleBook, “Receiving and Putting Away Stock,” Assigning Default Putaway Locations

PeopleSoft Enterprise Inventory 8.9 PeopleBook, “Structuring Inventory,” Defining Default Pegging Locations

Setting Up Notifications

Both soft and hard pegs will send notifications to interested parties when:

- Pegged supply is received into the purchasing business unit.
- Pegged supply completes putaway into the inventory business unit.
- The pegged orders are changed or canceled.

This is a critical step to monitoring your peg chains in your environment. To use notifications, you must set up the system-level registry and the business-unit level registry for pegging notifications.

The Message Dashboard is a central place to view all information related to messages, warnings and errors that occur from batch or online processes. A user receives notification of a message via email, a worklist, or XML format. The notification method contains a link to the message dashboard, so that the user can quickly view the message detail, and take action. The message dashboard provides potential actions, which make the decision making process easier for the user, or may redirect the user to other components within the system.

For pegging notifications using the Message Registry, the following process names do not use the user role or user ID defined in the BU-Level Notifications page or the System-Level Notifications page. Instead, these process names use the *owner* of the transaction, as follows:

Process Name	User Notified
OM_PEGGING	The customer service representative (CSR) located on the sales order.
WM_PEGGING	The lead person located on the work order.
PO_PEGGING	The buyer located on the purchase order.
REQ_PEGGING	The requester located on the requisition. If no requester is listed, then the system uses the user ID or user role listed on the BU-Level Notifications page or the System-Level Notifications page.

IN_PEGGING and PRDN_PEGGING process names use the user ID or user role defined on the BU-Level Notifications page or the System-Level Notifications page.

For all of the above pegging notifications:

- An online pegging notification sends an email and a worklist entry.
- A batch pegging notification sends a batch email and no worklist entry.

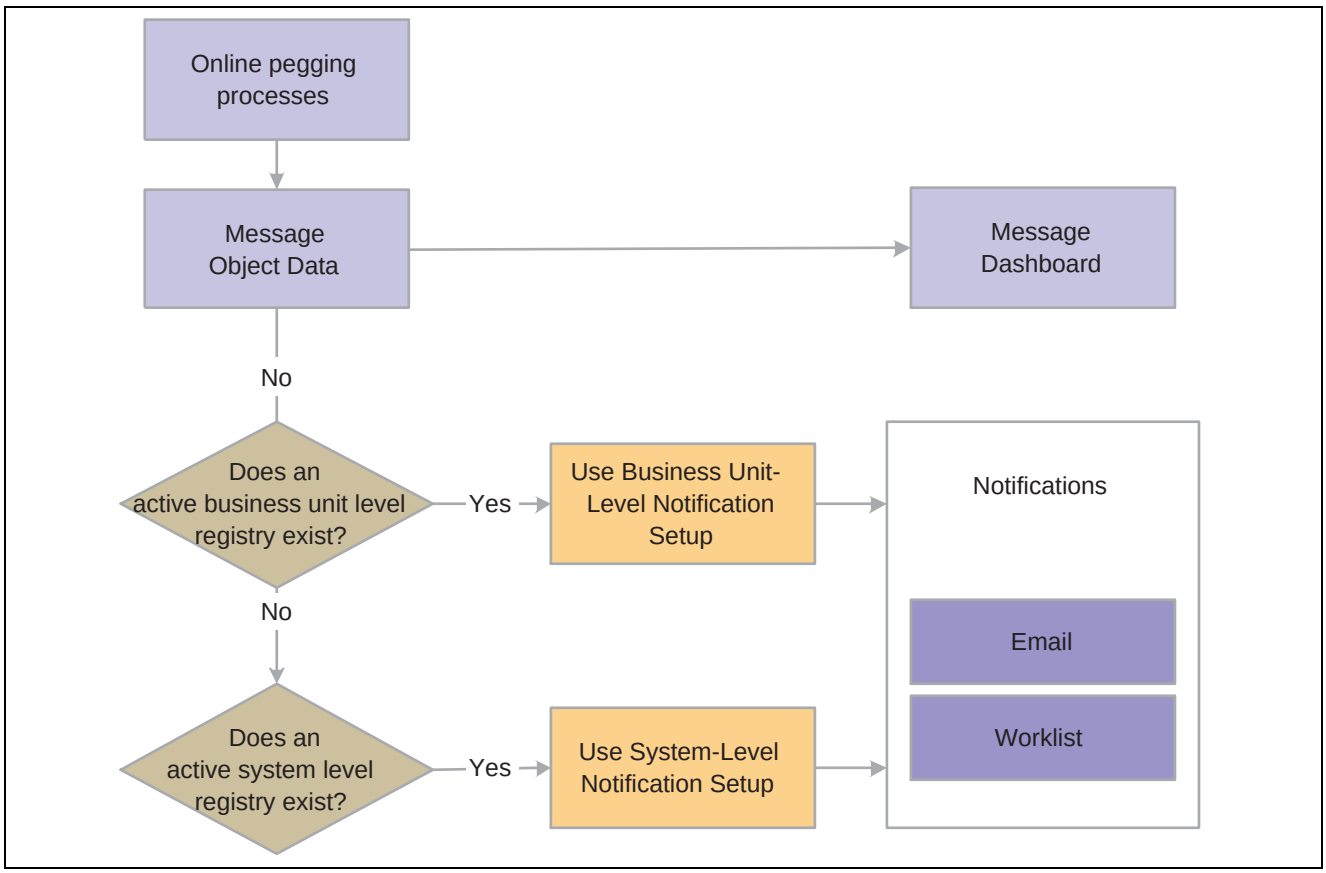
Pegging Notifications in PeopleSoft Manufacturing

The pegging notifications for production IDs in PeopleSoft Manufacturing have an additional setting on the MFG Business Unit Options page. The Compl and Close Peg Qty Change group box controls how often notifications are sent to a production ID. This group box controls how often pegging notifications are sent to a user or group of users when changes are made on a production ID. PeopleSoft Manufacturing has a number of common circumstances that could cause excessive pegging notifications to be generated. For example, normal scrap activity during the completions process could result in quantity reduction notifications. Completing serial controlled items would generate a receipt notification for every serialized item. The close process generates close notifications for every order closed. PeopleSoft Manufacturing offers three options for controlling the number of pegging notifications generated during the completions and close processes:

- *Notify at Compl and Close:* Enables all normal pegging notifications including order quantity changes and closing of production.
- *Notify at Close:* Enables normal notifications in the production close process and supresses order quantity change notifications during completions.
- *No Notify at Compl or Close:* Suppresses close notifications during the close process and suppresses quantity change notifications during completions.

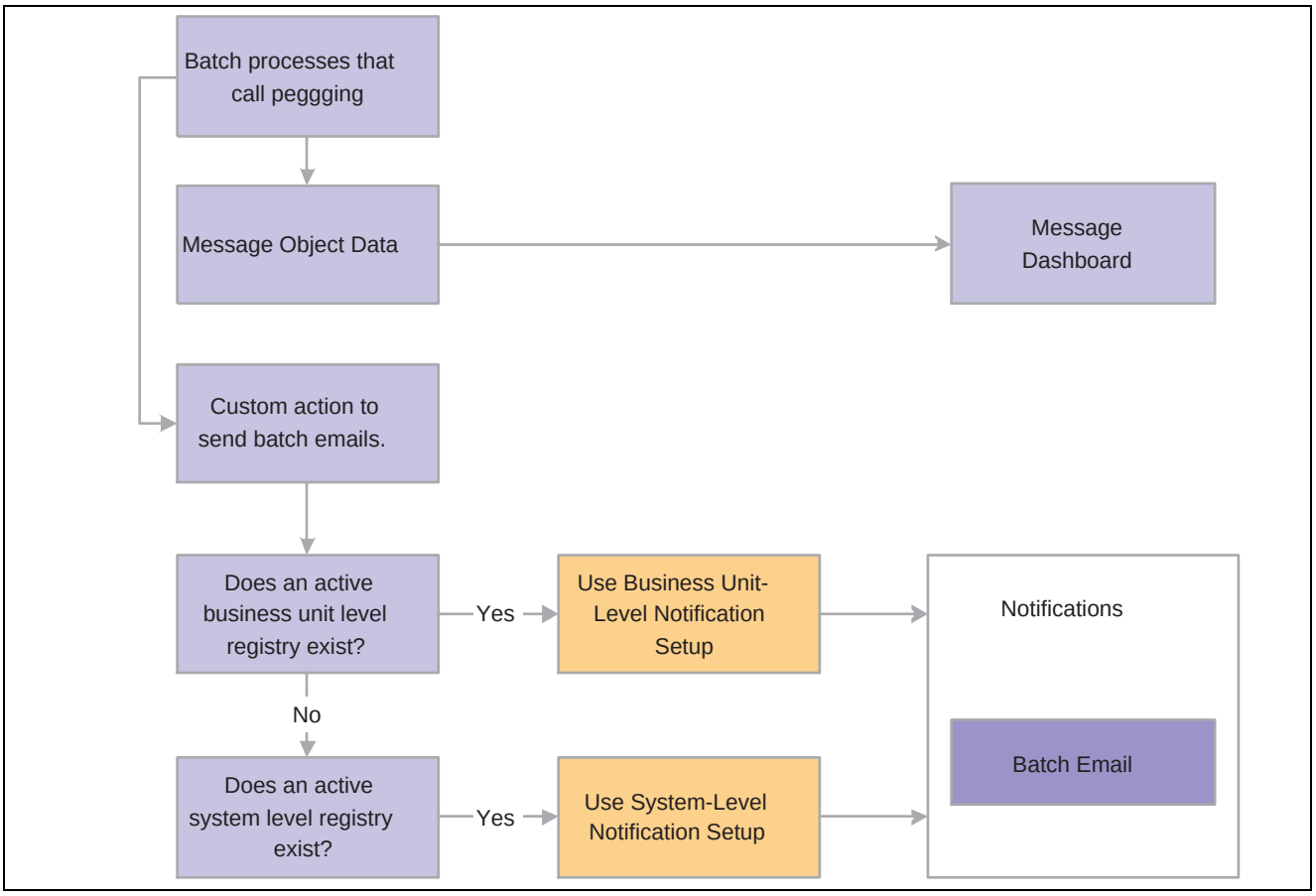
Pegging Notification Process Flow

The following diagram illustrates the process flow for notifications from online pegging processes:



Notifications from online pegging processes

The following diagram illustrates the process flow for notifications from batch pegging processes:



Notifications from batch pegging processes

See Also

Chapter 3, “Setting Up and Using the Message Dashboard,” page 47

Using the Pegging Workbench

The Pegging Workbench is used to create, change, or remove pegs. The workbench enables you to link a specific quantity from a demand to incoming supply. For example, 10 units of a soft-reserved item on an order’s demand line can be pegged to 10 units on a purchase order line that contains 50 units. One demand line can be pegged to one or more supply-side lines. For example, 10 units of a soft-reserved item on an order’s demand line can be pegged to 4 units on one purchase order and 6 units on another purchase order. In addition, you can peg the supply side to the demand side. One supply-side line can peg to one or more demand lines; for example, starting with a purchase order line with 50 units and pegging to a sales order that needs 10 units and then pegging to an MSR that needs 30 units.

The demand and supply lines that can be viewed and pegged using the Pegging Workbench are limited your pegging setup. Users can only access demand order types and supply order types defined for them in the User Security page. The Pegging Setup page and the Pegging Item Setup page can limit the time window of the Pegging Workbench for each user based on business unit or item. For example, a user may be limited to the supply order type of purchase orders due within the next week. The pegging setup also has the additional benefit of limiting the number of supply or demand lines displayed on the Pegging Workbench, rather than showing all open demand and supply.

Note. A user cannot access the Pegging Workbench unless they have been defined on the User Security page.

The workbench can be accessed from several different pages throughout PeopleSoft.

In order to be displayed on the Pegging Workbench:

- All orders must have some amount of open quantity. In other words, they cannot have been fully completed.
- Material stock requests from PeopleSoft Inventory must be in the *unfulfilled* state, approved, and for soft-reserved items; including; interunit demand.
- Sales orders from PeopleSoft Order Management must be in the *unfulfilled* state, approved, and for soft-reserved items.
- Purchase orders from PeopleSoft Purchasing must have a distribution line status of *open* and the Inventory Business Unit field cannot be blank.
- Requisitions from PeopleSoft Purchasing must have a value in the Inventory Business Unit field.
- Production IDs from PeopleSoft Manufacturing must be in any status before *pending complete*. No production schedules can be pegged. Only the primary output of a production ID can be pegged; you cannot peg co-products or by-products.
- Transfer supply from PeopleSoft Inventory must be approved and in any state other than *pending* or *canceled*.

The Pegging Workbench does not display:

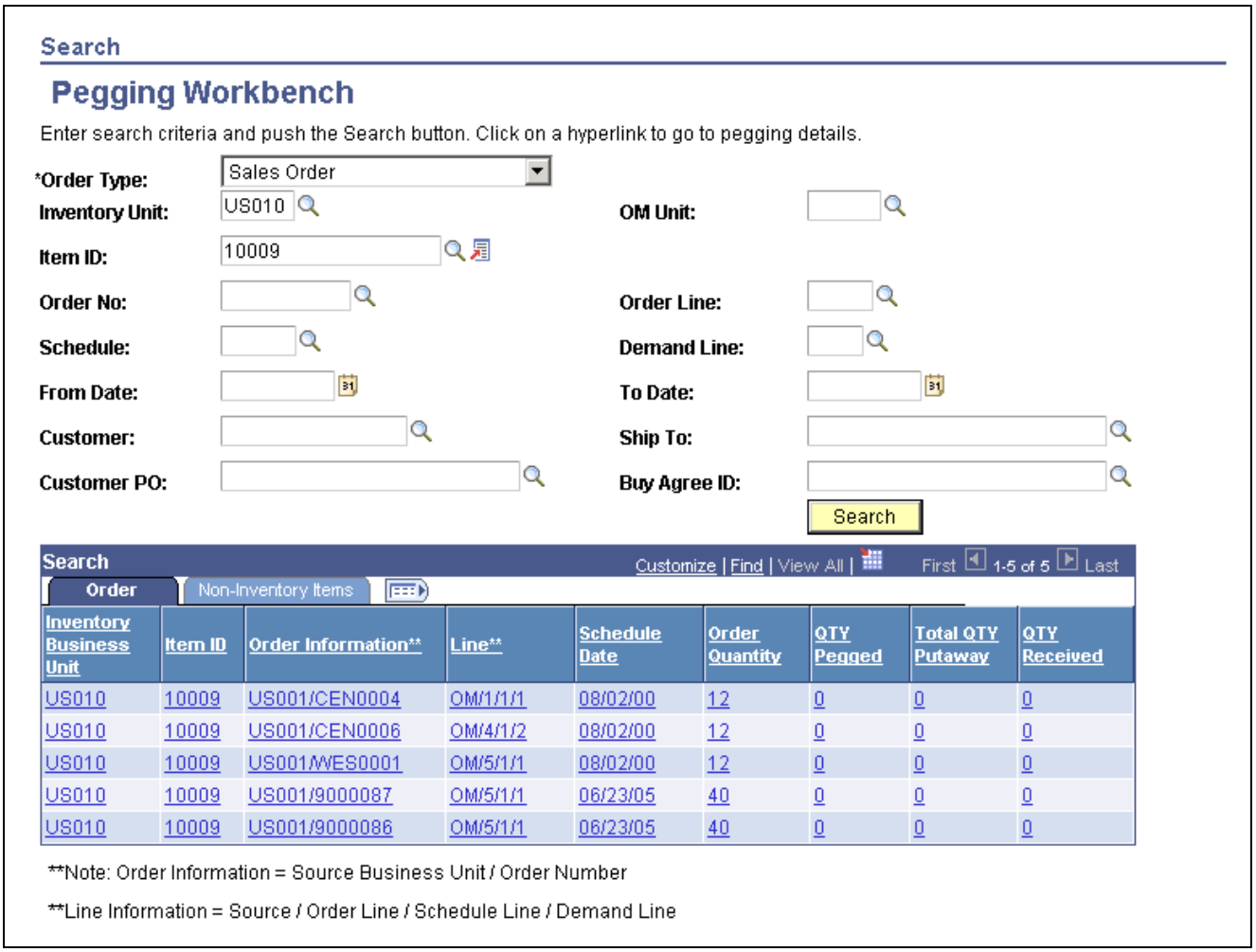
- Non-inventory items.
- Product kits.
- Configured product kits.
- VMI (vendor managed inventory) items.
- Sales orders that are pegged to a *direct ship* purchase order or requisition.

Pages Used for the Pegging Workbench

Page Name	Object Name	Navigation	Usage
Search - Pegging Workbench	IN_PEG_SEARCH	Inventory, Order Pegging, Workbench	Enter the search criteria for demand or supply to use on the Pegging Workbench.
Details - Pegging Workbench	IN_PEG_DETAIL	Inventory, Order Pegging, Workbench.	For an order, view the possible sources of supply or demand. Apply, change, or remove pegs to the order.
Work Order Material	IN_PEG_WO_ADD_SP	Select the Add Work Order Material link on the Pegging Workbench.	Add a work order resource to an existing work order task and create an automatic peg to it from a requisition or purchase order.

Finding Orders for the Pegging Workbench

Access the Search - Pegging Workbench page.



Search - Pegging Workbench page

Order Type

Select an order type to determine the demand or supply for pegging. The order type selected determines the search criteria fields displayed. Order types are:

- *Production:* (supply-side) Select to peg production IDs in PeopleSoft Manufacturing. This selection opens up the following search criteria fields: Production ID, Area (production area), Status (production status), and Type (production type).
- *Purchase:* (supply-side) Select to peg purchase orders in PeopleSoft Purchasing. This selection opens up the following search criteria fields: PO Unit (PeopleSoft Purchasing business unit), Order No. (purchase order number), Order Line, Schedule, Distribution Line, Vendor ID, Vendor Location, Vendor Name, and Buyer.
- *Requisition:* (supply-side) Select to peg requisitions in PeopleSoft Purchasing. This selection opens up the following search criteria fields: PO Unit (PeopleSoft Purchasing business unit), Order No. (requisition order number), Order Line, Schedule, Distribution Line, Vendor ID, Vendor Location, Vendor Name, Status (of the requisition), and Requester.
- *Sales Order:* (demand-side) Select to peg sales orders in PeopleSoft Order Management. This selection opens up the following search criteria fields: OM Unit (order management business unit), Order No. (sales order number),

Order Line, Schedule, Demand Line, Customer (Sold To customer), Ship To, Customer PO, Buy Agree ID (buying agreement ID).

- *Stock Request:* (demand-side) Select to peg material stock requests in PeopleSoft Inventory. This selection opens up the following search criteria fields: Order No. (MSR order number), Order Line, Schedule, Demand Line, Customer, Ship To, Location, and Carrier ID.
- *Transfer Demand:* (demand-side) Select to peg outgoing interunit stock requests shipping from the current inventory business unit to another inventory business unit. This selection opens up the following search criteria fields: Source Unit (originating inventory business unit), Destination Unit (receiving inventory business unit), Order No. (MSR order number), Order Line, Schedule, Demand Line, Location, and Carrier ID.
- *Transfer Supply:* (supply-side) Select to peg incoming interunit stock requests that will be received into the current inventory business unit. This selection opens up the following search criteria fields: Destination Unit (receiving inventory business unit), Source Unit (originating inventory business unit), Order No. (MSR order number), Order Line, Schedule, Demand Line, Location, and Carrier ID.
- *WO Inventory:* (demand-side) Select to peg work orders in PeopleSoft Maintenance Management. This selection opens up the following search criteria fields: Work Order Unit (PeopleSoft Maintenance Management business unit), Work Order ID, Task Number, Line, Work Type, Service Group, and Shop.

Inventory Unit Select the inventory business unit for pegging.

Item ID Select an item ID for pegging.

From Date and **To Date** Enter the date range for the scheduled shipment, arrival, or due dates.

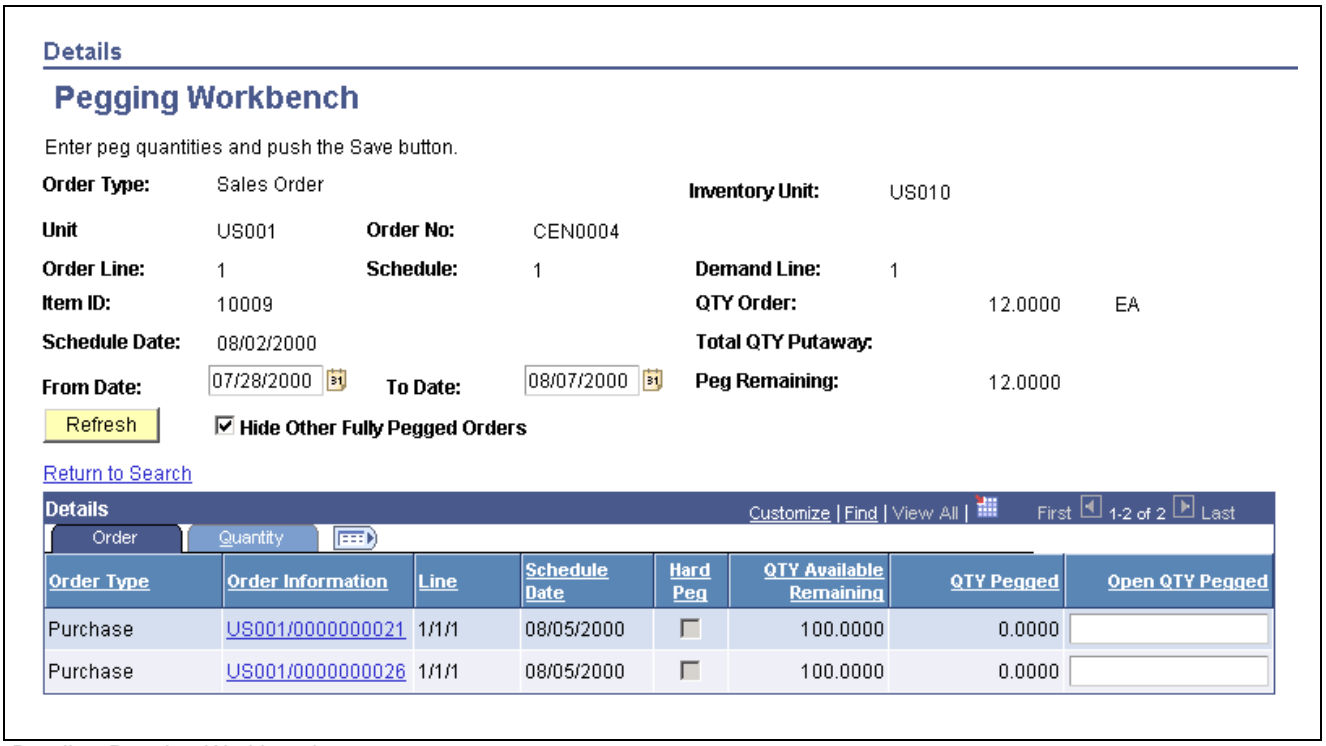
Search Select to activate the search based on your search criteria. Search results are displays at the bottom of the page in the Search group box.

Search

This group box displays a list of the lines (supply- or demand-side) that meet the search criteria entered above. Use this group box to select the line to peg. If the search results only return one row, the system takes you directly to the Details Pegging Workbench page.

Using the Pegging Workbench to Apply, Change, or Remove Pegs

Access the Details - Pegging Workbench page.



Details - Pegging Workbench page

The top part of this page displays information about the line (demand or supply) that you selected for pegging on the Search - Pegging Workbench page.

Unit and **Item ID**

Displays the inventory business unit and item ID of the line that you selected for pegging. The available orders to peg to that are displayed in the Details group box are filtered based on the inventory business unit and the item ID. For example, if a sales order with the item ID 10001 and inventory business unit US010 is displayed, then the Details group box will only display requisitions, purchase orders, production IDs, or incoming interunit stock requests (transfer supply) with the item ID 10001 and the destination inventory business unit US010. The same is true when pegging supply to demand. For example, if a purchase order with the item ID 10001 and inventory business unit US010 is displayed, then the Details group box will only display sales orders, stock requests, work orders, and transfer demand with the item ID 10001 and the destination inventory business unit US010.

From Date and **To Date**

Displays the date range for the lines displayed in the Details group box. The initial date range is based on the Workbench Detail Date Range entered on the Pegging Item Setup page or the Pegging Setup page. You can change the dates to refine the displayed lines for pegging.

Hide Other Fully Pegged Orders

Select to remove fully pegged supply or demand from the displayed lines in the Details group box. The page will only list orders that have some unpegged quantity available; enabling you to focus on available quantities. For example, if a purchase order is fully pegged to one stock request, then it does not appear in the Details group box for any other stock requests if this box is checked. If you clear the check box, then orders that are fully pegged to orders other than the header order appear in the Details group box, but they cannot be pegged. By viewing fully pegged orders with the item ID

needed, you can identify orders that you might want to un-peg in order to get quantities for the current peg.

Add Work Order Material Use this link to access the Work Order Material page where you can add business unit, Work Order ID, and Task Number to add a work order part to an existing work order and create an automatic peg. This link only displays if you are pegging a requisition or purchase order.

Details

The Details group box displays the available orders that can be pegged to. If the top part of this page displays information about a demand line, then the Details section displays the supply (requisitions, purchase orders, production IDs, and transfer supply) available for pegging. If the top part of this page displays information about a supply-side line, then the Details section displays the demand (sales orders, stock requests, work orders, and transfer demand) available for pegging. Keep in mind that the demand and supply that can be viewed and pegged using the Pegging Workbench are limited by user ID on the User Security page.

If there was already quantity pegged to the demand or supply displayed on the top part of this page, then the system displays these pegged lines first and enables you to change the pegged quantity against that line or zero the quantity out to break the peg chain.

Order Information Displays the source business unit and order number. Select the line link to access an inquiry page with additional information about this order.

Line Displays the order line, schedule line, and distribution (or demand) line.

Hard Peg Indicates if the row has hard-pegged demand or supply. Hard pegs indicate that the existing peg has a one to one relationship between a demand line and a supply-side line. If you attempt to peg additional demand or supply quantities to this row, the system display a warning message that this action will change the peg to a soft peg. If you continue with the change, then the peg chain will be changed to a soft peg.

QTY Available Remaining Displays the item quantity that is available to be pegged.

QTY Pegged to Other Orders Displays the quantity of this line that has already been pegged to another order. Select the hyperlink quantity to open up a separate window to view this other peg chain on the Details Pegging Workbench page. You can use this separate window to change or remove the peg chain to the other order.

QTY Pegged Displays the total pegged quantity of this line. Completions are not subtracted from this quantity.

Open Qty Pegged Displays the total peg quantity less any completions. To create a peg, enter a quantity in this field to be pegged against the line that is displayed at the top of this page and then click the Save button. This creates the peg chains for the demand and supply. To break (remove) a peg, enter zero in this field and then click the Save button.

Pegged QTY Received Displays the pegged quantity that has already been received or completed.

Note. This displayed quantity is not decrease for returned materials on RTV transactions.

Pegged QTY Putaway/Sourced Displays the pegged quantity that has already been putaway into a PeopleSoft Inventory business unit. If this is a requisition, then this field displays the

quantity that has already been sourced to a purchase order or material stock request.

Total QTY Putaway/Sourced (supply-side only) Displays the total quantity of this line that has already been putaway into a PeopleSoft Inventory business unit. If this is a requisition, then this field displays the total quantity that has already been sourced to a purchase order or material stock request.

Note. All quantity fields use the standard unit of measure for the item ID.

Changing Peg Chains

From the Pegging Workbench and the transaction pages where pegs can be changed, a user can alter a peg chain by changing quantities, dates, items, or canceling orders. When a change is made by a user, the system calls the centralized peg chain update function to update the peg chain in the IN_PEGGING record and create any necessary notifications to the Message Dashboard. For hard pegs, the system also alters the supply-side transaction to conform to the change.

The notifications sent to the Message Dashboard are:

- For sales orders, sent to the sales order owner.
- For purchase orders, sent to the buyer.
- For all other order types, sent to the user defined in the System-Level Notifications page or the BU-Level Notifications page.

Note. For hard pegs, a supply-side transaction is only automatically updated when a change is made to the sales order.

The peg chain update function is called when the following changes occur:

- Changing the quantity, UOM, or schedule date of a demand or supply-side transaction. This includes sales orders with configured items.
- Canceling a demand or supply-side transaction.
- Changing the item ID or business unit on demand or supply-side transaction. This breaks the peg chain.

Monitoring Peg Chains

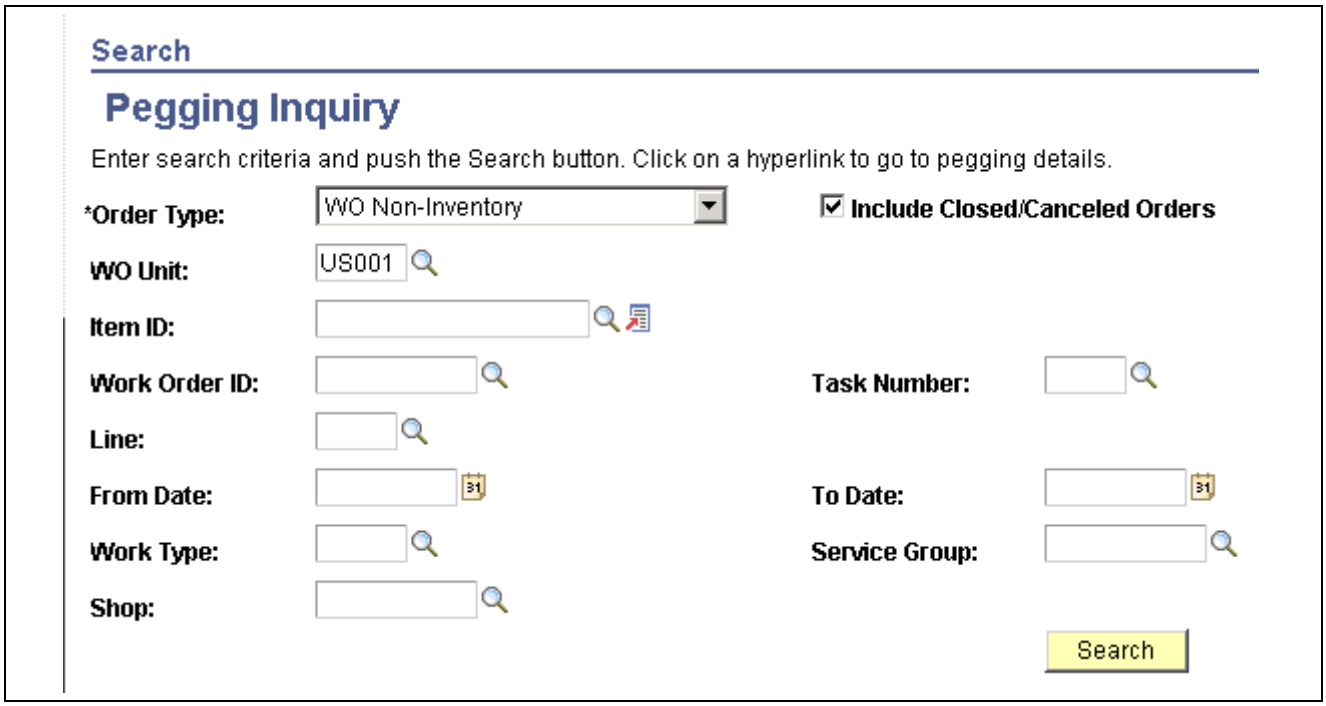
Use the Pegging Inquiry component and the Pegging Exception report to monitor pegs within your system.

Pages Used to Monitor Pegs

Page Name	Object Name	Navigation	Usage
Search - Pegging Inquiry	IN_PEG_SEARCH	Inventory, Order Pegging, Inquiry	Enter search criteria and select the demand or supply to review.
Details - Pegging Inquiry	IN_PEG_DETAIL	Inventory, Order Pegging, Inquiry Enter search criteria and select a line.	For an demand line or supply-side line, view all existing peg chains, including complete or canceled pegs. If there are any additional pegs against the lines displayed in the Details section, you can select the linked quantity to open another window and view the other peg chains.
Pegging Exception Report	IN_PEG_REP	Inventory, Order Pegging, Pegging Exception Report	Enter parameters and run the Pegging Exception Report (INS9095) process.

Searching for Pegs to View

Access the Search - Pegging Inquiry page.



Search - Pegging Inquiry page

This page uses the same fields as the Search - Pegging Workbench page plus two additional options.

Include Closed/Canceled Orders Select to search for orders with a closed or cancelled status.

Order Type

Select an order type for the peg chains to be viewed. The order type selected determines the search criteria fields displayed. This page includes all the order types that are used by the Search Pegging Workbench page plus one more option:

WO Non-Inventory: (demand-side) Select to view peg chains that link work orders in PeopleSoft Maintenance Management to non-inventory items on a requisition or purchase order in PeopleSoft Purchasing. This selection opens up the following search criteria fields: Work Order Unit (PeopleSoft Maintenance Management business unit), Work Order ID, Task Number, Line, Work Type, Service Group, and Shop.

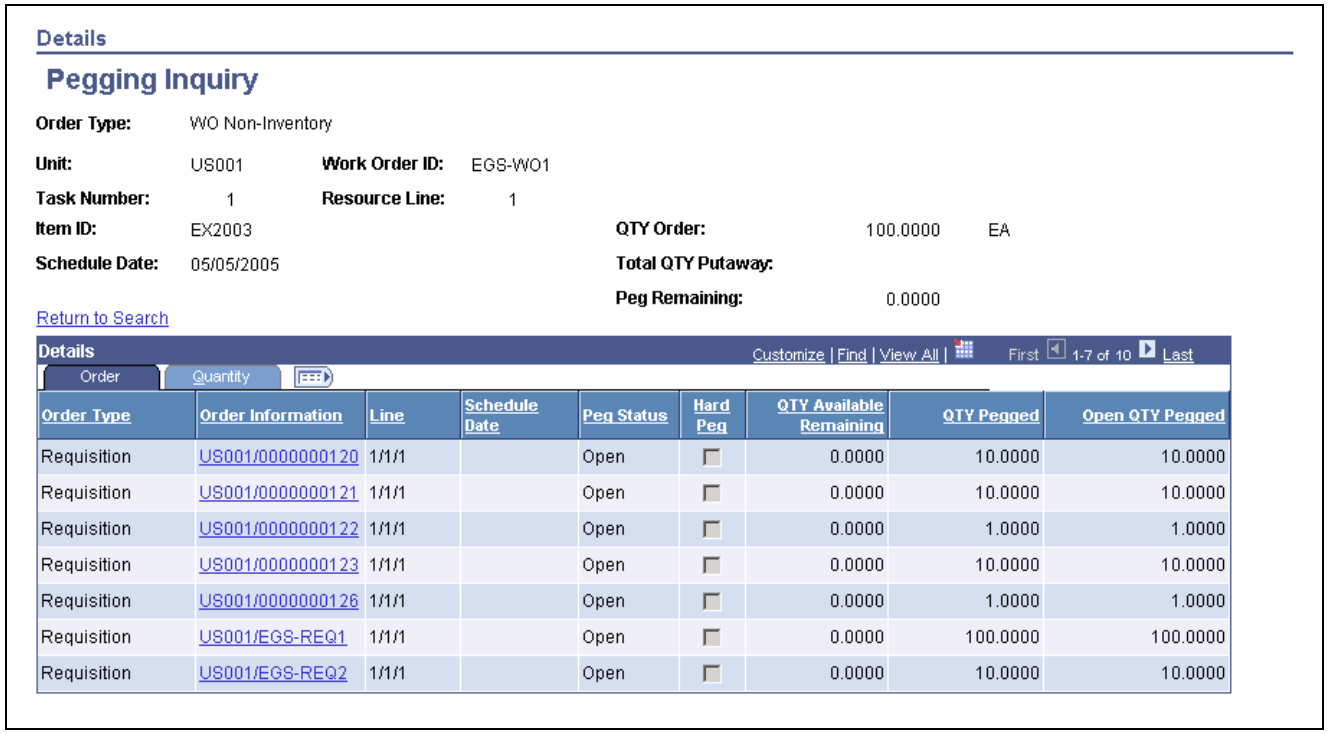
In addition, this page enables you to view sales orders with configured items that were pegged via the PeopleSoft Product Configurator setup. These pegs can be viewed but not changed.

See Also

Chapter 4, "Pegging Supply and Demand," Finding Orders for the Pegging Workbench, page 96

Viewing Peg Chains

Access the Details - Pegging Inquiry page.



Details - Pegging Inquiry page

This page uses the same fields as the Details - Pegging Workbench page, plus:

Peg Status

The PEG_STATUS field is located on the demand and supply-side transaction line and includes the following values:

- *Open* (10): Indicates that the line has a currently active peg.

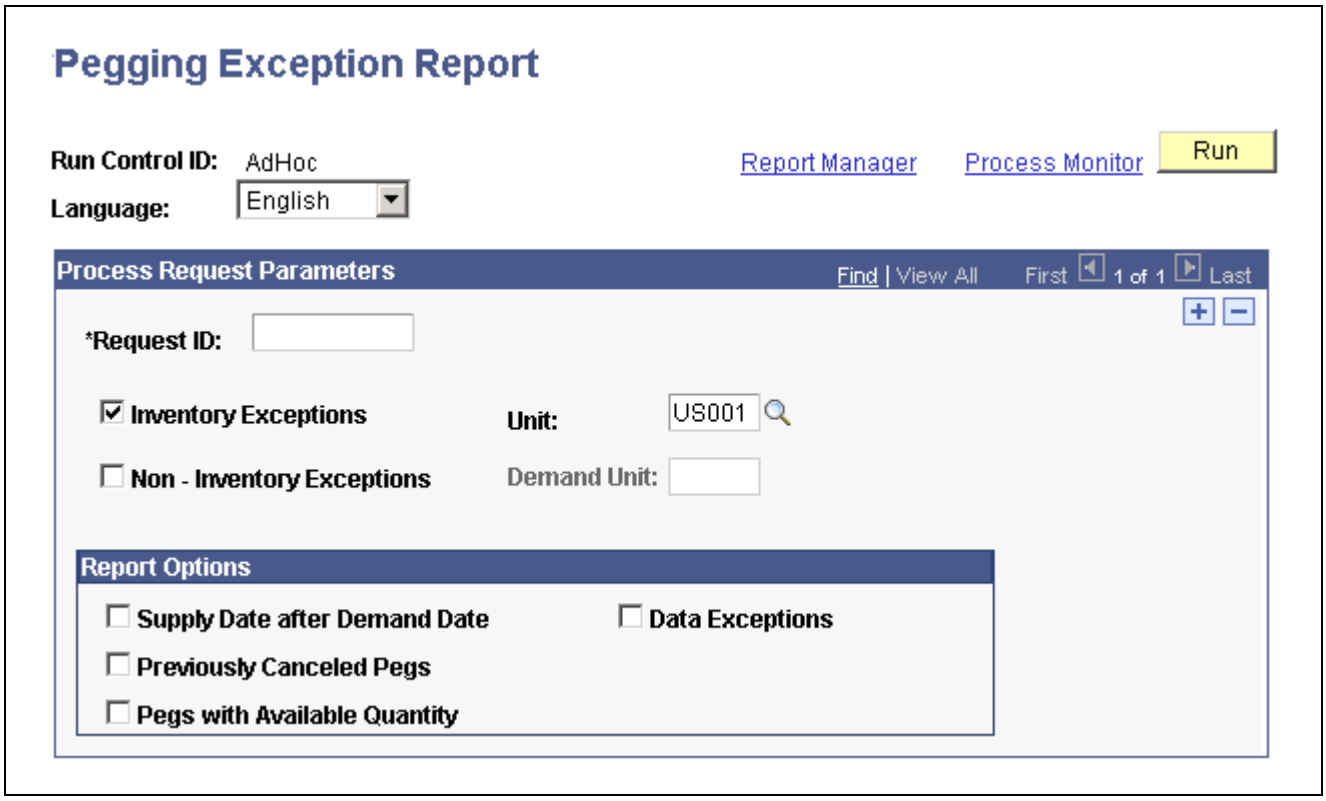
- *Completed* (20): Indicates that the pegged supply has been received and putaway into the PeopleSoft Inventory business unit.
- *Canceled* (30): Indicates that the peg chain was broken.

See Also

Chapter 4, "Pegging Supply and Demand," Using the Pegging Workbench to Apply, Change, or Remove Pegs, page 98

Using the Pegging Exception Report

Access the Pegging Exception Report process page.



Pegging Exception Report process page

Inventory Exceptions Select to include inventory items in the pegging exception report.

Unit Enter the PeopleSoft Inventory business unit for inventory item pegging exceptions.

Non-Inventory Exceptions Select to include non-inventory items used in work orders in the pegging exception report.

Demand Unit Enter the business unit for PeopleSoft Maintenance Management.

Report Options

Select to produce the following reports:

Supply Date after Demand Date	Select to produce a report of peg chains whose supply date is after the demand date; that is, the supply will come in too late to satisfy the demand.
Data Exceptions	Select to produce a report of: • Peg chains where the supply or demand quantity is less than the pegged quantity. • Peg chains where the inventory business unit of the demand does not match the supply. • Incorrect pegged status, where orders have pegs but the peg status on the line is turned off and vice versa. • Canceled transactions with open pegs, where a transaction which has been canceled still has pegs remaining against it.
Previously Canceled Pegs	Select this check box to produce a report of peg chains where the supply or demand has been canceled. The system breaks the peg chain automatically when this happens.
Pegs with Available Quantity	Select this check box to produce a report of peg chains where open peg quantity exists and there is available quantity for the item currently in the inventory business unit that could be used to fulfill the demand line.

CHAPTER 5

Implementing the Verity Search Engine

This chapter provides an overview and discusses how to:

- Build the Verity search engine.
- Create and update the Verity search collection.
- Set up and run the Verity search update Daemon Group program.
- Configure Verity search index options.
- Maintain the Verity thesaurus.

Understanding the Verity Search Engine

The Verity search engine enables requesters to search using synonyms and match cases. Also, you have the option to define price range and model as search fields. The Verity search engine can be used to access items from the PeopleSoft Item Master table or other item sources, including express catalog items. Once the items are indexed into the Verity collection, they can be searched and browsed for PeopleSoft eProcurement.

The Verity search engine consists of these components:

Verity Search Collection A collection is a language-specific directory or folder that contains multiple subdirectories that contain various kinds of files used by the Verity search engine during indexing and searching.

Note. These files are created based on a snapshot of the data in the specified record/field.

Verity Field A field indexed into a Verity collection can be searched using word searching or comparison searching. For example, if you wanted to search of items priced less that $20.00 USD, *Price* must be in the index as a field. The value indexed in a Verity field can be returned to an application using the Verity results framework.

Zone A zone contains a group of words that are identified by a set of XML-like open and closed tags. For example, `<DESCR> long sleeve shirt </DESCR>`. A zone is indexed into the Verity collection for searching purposes only. Information indexed in a zone can't be returned to the calling application. Comparison searching can't be done in a zone. Searching within a zone proceeds faster than when using fields.

Data Object Defines the record relationships.

Data Object Set A set of data objects that are related to each other with level and parent-child information.

A Verity collection is a group of fields that you set up that is used by the Verity search engine to index and assist users in their search for items. You define the fields for a requester to utilize in their search for items.

You can use either batch updates and rebuild, or incremental updates to build, Verity index collections. Searches are then performed against this collection. Items loaded from a CUP process can be indexed directly into the collection by checking the Index Others check box.

The Verity collection is built using the PeopleSoft Application Engine process (PV_IDX_DATA), which is accessible from the Build Verity Collection page. This process extracts data from the item catalog tables and writes a few intermediate text files: the BIF files and the DAT files. These files are indexed into the Verity collection, which comprises multiple file folders.

To implement the Verity search engine, use the Verity Search Indexing and the Maintain Verity Information components.

Note. These PeopleSoft application utilize the Verity search engine: PeopleSoft eProcurement, PeopleSoft Order Management, and PeopleSoft Contracts. While much of the discussion in this chapter relate to PeopleSoft eProcurement, you can apply the same concepts to the other applications.

See *PeopleSoft Enterprise PeopleTools 8.46 PeopleBook: Verity Collection Reference Guide for PeopleSoft*

Prerequisites

Before you begin building Verity indexes, you must enable Verity as the Catalog Search Type on the eProcurement Installation Options page.

See *PeopleSoft Enterprise eProcurement 8.9 PeopleBook*, "Determining eProcurement Technical Implementation Options," Setting Up PeopleSoft eProcurement Installation Options.

Building the Verity Search Index

The Verity search engine is made up of multiple indexes. General setup tasks are:

1. Activate Verity on the Installation Options page.
2. Build the search index.
3. Run each of the Build Search Indexes processes.
4. (Optional) Set up the daemon to run periodically to automatically refresh the indexes.

Fields indexed into the collection are:

Verity Field/Zone Name	Indexing Logic	PeopleSoft Record/View
VdkVgwKey	Concatenate the following fields in this format to form a unique key: {SETID}{INV_ITEM}{VENDOR_SETID}{VENDOR_ID}	MASTER_ITEM_TBL and ITM_VENDOR
ACTIVE	Item is always active.	MASTER_ITEM_TBL
ALL_RGNS	Item is available to all regions.	PURCH_ITEM_ATTR
ALL_IV_REGIONS	Concatenate all vendor regions that are valid for an item.	Item vendor region record
IV_REGIONS	Concatenate all vendor regions that are valid for an item and a specific vendor.	Item vendor region record
IV_REGIONS_PRIO	Index the item vendor priority for each item vendor region information.	Item vendor region record
SETID	SetID.	MASTER_ITEM_TBL
VENDOR_SETID	Vendor SetID.	ITM_VENDOR
VENDOR_ID	Vendor ID.	ITM_VENDOR
CATEGORY_ID	Category ID.	MASTER_ITEM_TBL
CAT_DESCR	Category description.	ITM_CAT_TBL
ALL_CAT_ID	Concatenate all related category IDs for an item.	PV_ITM_CATEGORY
ALL_CAT_DESCR	Concatenate all related category descriptions for an item	PV_ITM_CATEGORY and PV_ITM_CAT_TBL
CURRENCY_CD	Currency code.	PURCH_ITEM_ATTR
CNV_CURRENCY_CD	Converted currency code.	PV_SRCH_RUN_CTL

Verity Field/Zone Name	Indexing Logic	PeopleSoft Record/View
CNV_PRICE	Use item vendor price for the default UOM, if exists. If not, use standard price.	ITM_VNDR_UOM_PR and PURCH_ITEM_ATTR
TREE_NAME	Concatenate all tree/catalog names into one field.	PV_CAT_TREE_TBL and MASTER_ITEM_TBL.
DESCR	Include DESCR254_MIXED. **Note.** This description comes from the Purchasing Attributes Long Description.	PURCH_ITM_ATTR
INV_ITEM_ID	Item ID.	MASTER_ITEM_TBL
INV_ITEM	Inventory Item Flag.	MASTER_ITEM_TBL
ITM_ID_VNDR	Vendor Item ID.	ITM_VENDOR
ITM_DT_F	Future item status date.	MASTER_ITEM_TBL
ITM_STAT_C	Current item status.	MASTER_ITEM_TBL
ITM_STAT_F	Future item status.	MASTER_ITEM_TBL
MASTER_ITEM	Set this field to *Y* if item is from master item record. *N* if from Express Catalogs.	AE PeopleCode
PREF_VENDOR_SW	Populate this field based on the item vendor priority value. If it is *1*, set this flag to *Y*.	ITM_VENDOR
PRICE_LIST	Standard Price.	PURCH_ITEM_ATTR
PRICE_VNDR	Item vendor price.	ITM_VNDR_UOM_PR
MFG_ID	Manufacturer ID. Use Item Vendor Mfg ID if it exists. If not, use Item Mfg ID.	ITEM_MFG and ITM_VENDOR_MFG
MFG_ITM_ID	Manufacturer's item ID.	Item vendor Manufacture and Item Manufacture

Verity Field/Zone Name	Indexing Logic	PeopleSoft Record/View
MFG_NAME	Concatenate Manufacture ID and Manufacture name. (These can be separate also.) Manufacture information from item vendor level should be used if it exists. if not, use the item level information.	ITM_VENDOR_MFG and ITEM_MFG
PREF_MFG	Use the preferred manufacture flag from the item vendor manufacture record, if it exists. If not, use the item manufacture record.	ITM_VENDOR_MFG and ITEM_MFG
VNDR_NAME1	Concatenate the vendor ID and vendor name. (These can be separate also.)	ITM_VENDOR and VENDOR
MODEL	Model.	PURCH_ITEM_ATTR
UPN_ID	UPN ID (universal product number).	ITEM_MFG_UPN_FS
RETURN_VALUES	Concatenate all fields required to be displayed on the requisition into this RETURN_VALUES field.	All record relevant record fields.

Enabling the Verity Search Engine

To set up Verity searches, use the Verity Search Indexing component.

To set up the Verity search engine:

1. Open the application server configuration file in a text editor (psappsrv.cfg) and add the following search index path under the [Search Indexes] section: FDM_PV_ITEMCATALOL=[Collection File Path].

   Note. *[Collection File Path]* is the directory path that the system uses to store the Verity collection files. This directory must be shared if multiple application servers are accessing the same path. There are no spaces before or after the equal sign in the search index path.

2. Open the process scheduler server configuration file (psprcs.cfg) in a text editor.

   Copy the [Search Indexes] section from the application server configuration file and paste it near the end of the psprcs.cfg file.

3. Create and configure a process scheduler to run on the application server where the system runs the indexing process.

4. Navigate to the Build Verity Collection page and create the collection for the first time using the Create New/Rebuild Collection option and then running the process for the platform.

   Note. It is important that the Update/Reload Tree Table check box is selected if this is a first-time build. Also, use this option whenever there are changes to the tree data. However, if tree data has not changed since you last ran the process, you can clear the check box to improve performance of the indexing process.

   The system uses VSE to index the tree table automatically and activate the tree table PV_CAT_TREE_TBL for item browsing.

   Note. The PV_CAT_TREE_TBL tree table must be populated for Verity searching.

5. Use the Build Verity Collection page to schedule the process to periodically update or rebuild the item catalog collection.
6. Set the *Catalog Search Type* on the eProcurement Installation Options page to *VSE*.

Setting Up the Daemon Process

Incremental updates provide online updates for items that are added, updated, or inactivated in the Item Definition, Item Approval, Item Copy, and Purchasing Attributes components. With Verity incremental updates, you can set up a Daemon process that automatically updates index values at a specified time interval.

Use the Maintain Verity Online Update Fields page to activate or inactivate the inventory and purchasing Verity index fields. When any of the active fields specified on PV_VER_IDX_FLDS are changed in the Item Definition, Item Approval, Item Copy, or Purchasing Attributes components, data is immediately stored in staging table PV_VER_UPD_STG.

This application engine program is run at specified time intervals. It calls the Verity Indexing program (PV_SRCH_INDX) to update all data stored in the staging table.

Creating and Updating the Verity Search Collection

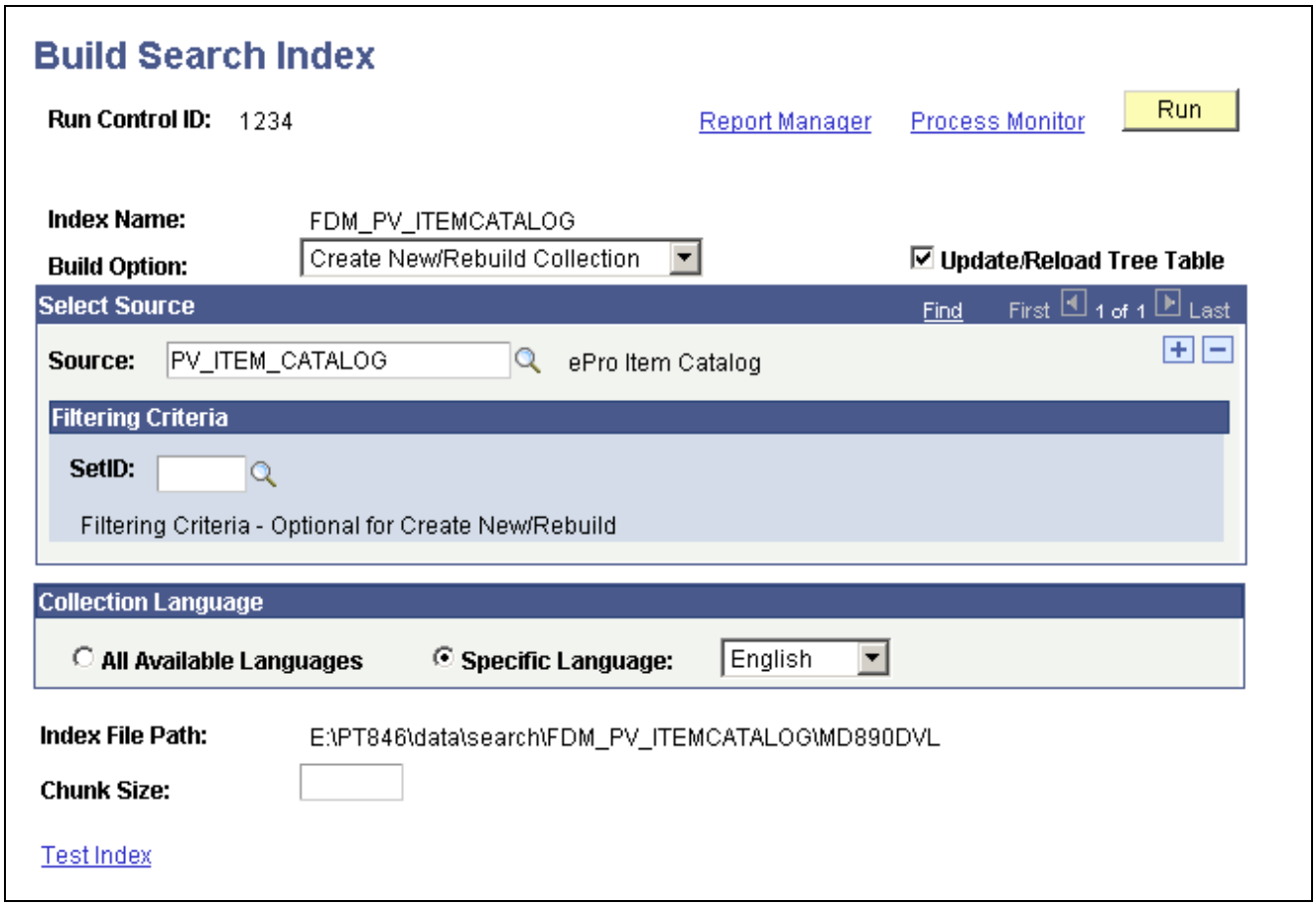
This section discusses how to create and update the Verity Search Collection.

Page Used to Create and Update the Verity Search Collection

Page Name	Object Name	Navigation	Usage
Build Search Index	PV_IDX_RUN_CNTL	eProcurement, Administer Procurement, Maintain Supplier Integration Click the Build eProcurement Verity Collections link on the Maintain Supplier Integration page.	Use this process to update the eProcurement FDM_PV_ITEMCATALOG catalog only. Access is limited to users with the eProcurement action role System_Admin. Use this page to define parameters for loading items into catalogs that the Verity search engine uses to search for items. If you will not be configuring the index, you need only to build a search index and run the Daemon process. **Note.** eProcurement delivers a set of system data of the FDM_PV_ITEMCATALOG collection. See Chapter 5, "Implementing the Verity Search Engine," Configuring Verity Search Indexing Options, page 116.

Building Search Collections

Access the Build Search Index page.



Build Search Index page

Index Name Enter a name for the index you are creating, or use the delivered index *FDM_PV_ITEMCATALOG.*

Build Option Select the build method for the search index. The filtering criteria used depends on the method you select. The values are:

Create New/Rebuild indicates that you are creating or rebuilding an index. You can limit the data retrieval by specifying a setID.

Process Last Modified runs the process based on last modified incremental updates.

Update All Items for a Vendor enables you to limit the update to a specific *Vendor SetID* or *Vendor ID* or both.

Update Specific SetID or Items enables you to limit the update to a specific *SetID* or a range of *Item IDs* or both.

Update by Other Criteria enables you to limit the update by giving value to any or all of these additional criteria:

- *Source Data Object*
- *Record Name*
- *Field Name*

Update/Reload Tree Table Select to populate the table PV_CAT_TREE_TBL.

Source	If additional data filtering is needed, select to assign a source data object to the index.
Collection Language	Select a language code. You can index Verity for multiple languages; for example, English, Spanish, and Dutch. This makes it possible to support multiple languages in one system.
Index File Path	This display-only field is populated from the Application Configuration file.

Note. Make sure that the collection is accessible to all applications servers and to the process scheduler server running this process.

Test Index	Click this link to determine whether there are entries in the index.

To run the search index process:

On the Process Scheduler Request page, select *Verity Search Indexing* (PV_SRCH_INDX).

Setting Up and Running the Verity Search Update Daemon Group Program

This section discusses how to create and use a daemon group.

Understanding Daemon Groups

Daemon groups are used to periodically update Verity indexes with the most recent changes. A Daemon group is the equivalent of running a single job in the process scheduler. By using the Daemon group, you can effectively run multiple processes without having to run multiple jobs. Use the Daemon group if you are running frequent update processes. The Daemon groups are used primarily for updating changes to the Verity index, and should not be used to run an entire rebuild of your Verity index.

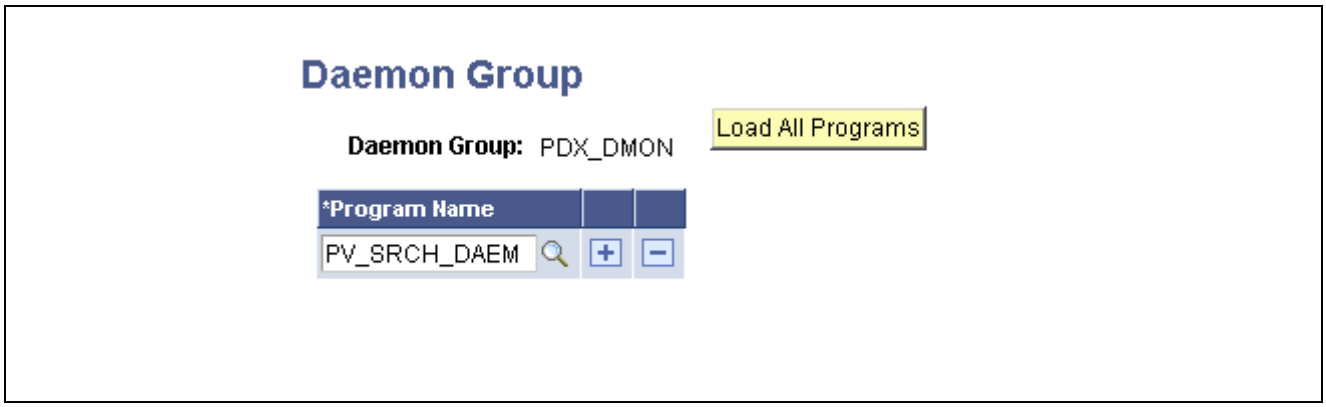
Note. If you have a large amount of data, you should examine the frequency of running the Daemon group. The system needs time to process all of the information within the tables.

Page Used to Set Up and Run the Verity Search Update Daemon Group Program

Page Name	Object Name	Navigation	Usage
Daemon Group	DAEMONGROUP	PeopleTools, Process Scheduler, Daemon Group	Set up and run the Verity search update Daemon Group Program.

Setting Up and Running the Daemon Group

Access the Daemon Group page.



Daemon Group page

To set up the Verity Search Update Daemon program:

1. Create a new Daemon group.
    a. Add a new Daemon Procedure Group *PVDAEMON*.
    b. Select the program name *PV_SRCH_DAEM*.
    c. Save the Daemon group.
2. Set up the PeopleSoft Process Scheduler Server using PeopleTools, Process Scheduler, Servers.
    a. Select to edit PeopleSoft Process Scheduler server.
    b. On the Daemon tab, select the Daemon Group *PVDAEMON*.
    c. Select the Daemon Enabled check box.
    d. Specify the Daemon Sleep Time.
    e. Save the changes.
3. Clear the PeopleSoft Process Scheduler cache and restart PeopleSoft Process Scheduler. The Daemon process starts automatically. You can view a log of the process on the Process Monitor - Server List page.

Configuring Verity Search Indexing Options

This section provides an overview of Verity Search Indexing options and discusses how to:

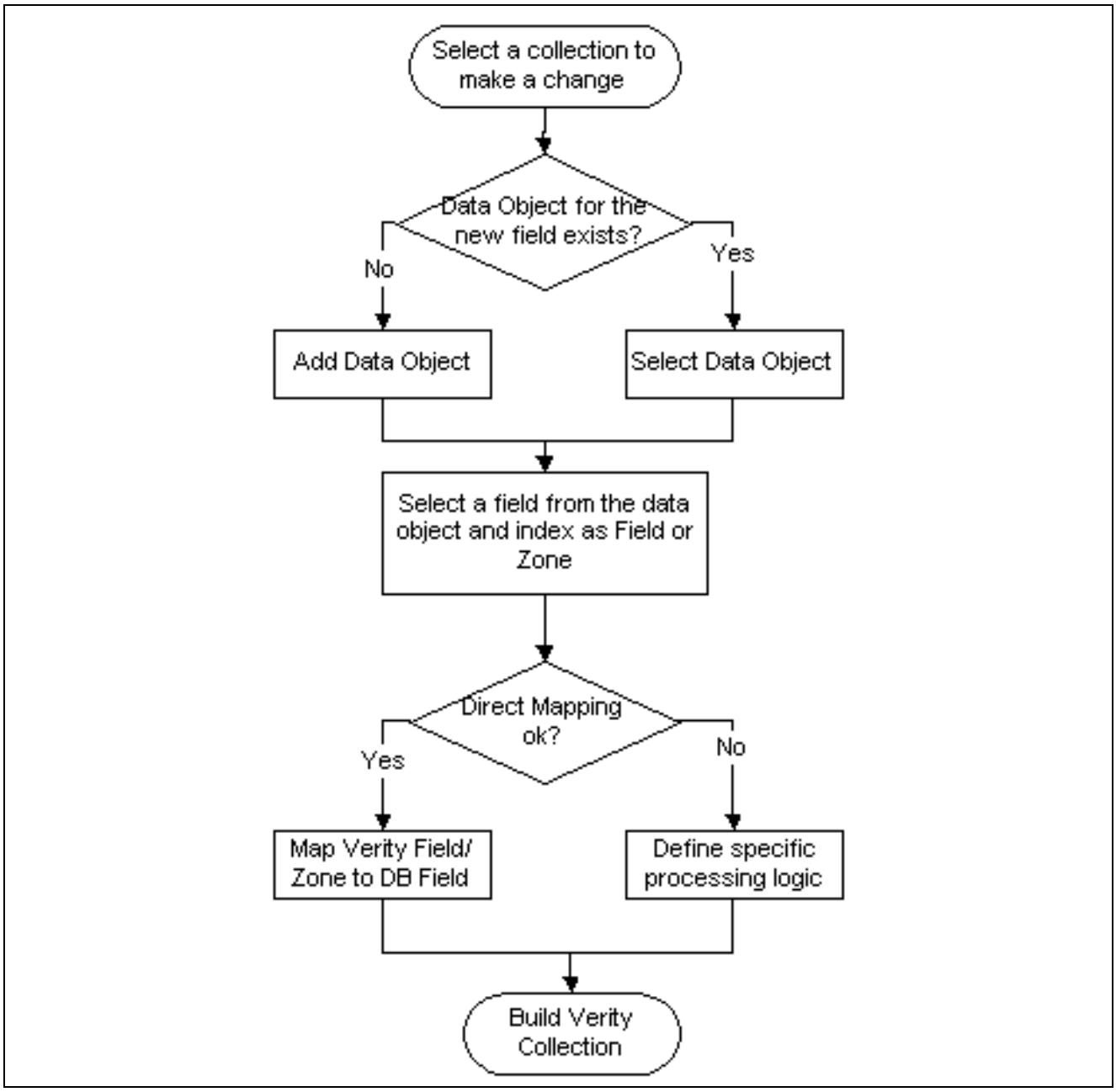
- Set up and run the Daemon group.
- Dynamically alter Source to Index.
- Define source data objects.
- Define source data object fields.
- Define source data object join conditions.
- Define source data object data object sets.
- Enable the incremental update process.
- Define search indexes.
- Define search index fields.
- Create a search query.

- Define field labels for custom searches.
- Display search results.
- Define search options.

You can dynamically add or remove records and fields from the Verity search engine. The process consists of these steps:

1. Determine if an existing data object contains the field you need to add or remove.
2. If you do not have an existing data object, you must create one.
3. Select the field from the data object and index as a field or a zone.
4. Either map the Verity field/zone to the database field, or define processing logic.
5. Build the Verity collection.

This diagram illustrates the change order process:



Configuring the Verity collection

Dynamically Altering Source to Index

To make changes to the information source that you will index:

1. Define the search index fields, and either add or subtract them from the data source object.
2. Define new data object sets to signify the location of the data source.

Pages Used to Configure Verity Search Indexing Options

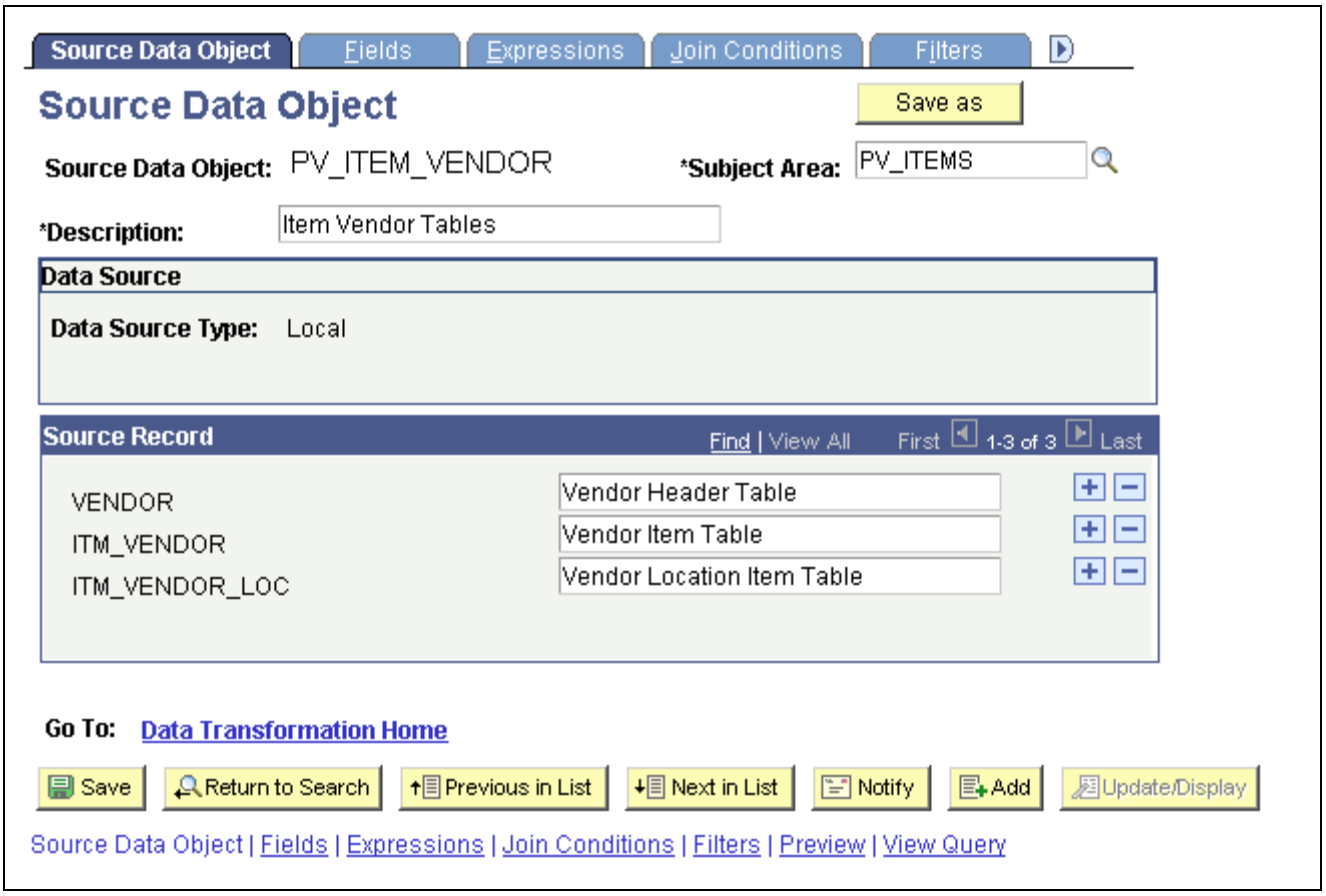
Page Name	Object Name	Navigation	Usage
Source Data Object	EOEW_SRCDO	eProcurement, Administer Procurement, Maintain Supplier Integration Click the Define Data Objects link on the Define Data Object Set page.	Identify a grouping of source records.
Fields	EOEW_SRCFIELD	eProcurement, Administer Procurement, Maintain Supplier Integration Click the Define Data Objects link on the Define Data Object Set page. Click the Fields tab.	Select fields from source records that will be used in the search index.
Join Conditions	EOEW_SRCJOIN	eProcurement, Administer Procurement, Maintain Supplier Integration Click the Define Data Objects link on the Define Data Object Set page. Click the Join Conditions tab.	Indicate how the system should put two source records and field combinations together to simplify indexing.
Build Search Index	SAC_IDX_RUN_CTRL	eProcurement, Administer Procurement, Maintain Supplier Integration Click the Build Search Indexes link on the Maintain Supplier Integration page.	If you create your own search index, you need to use this process to build the index. Access is limited to users with the eProcurement action role System_Admin.
Define Data Object Set	SAC_IDX_DO_SET	eProcurement, Administer Procurement, Maintain Supplier Integration Click the Define Data Object Set link on the Maintain Supplier Integration page.	Define the parent child relationships among the identified source data objects.
Define Search Index	SAC_IDX_DEFINE	eProcurement, Administer Procurement, Maintain Supplier Integration Click the Define Search Indexes link on the Maintain Supplier Integration page.	Identify the data object set, which contains the data source object, records, and fields. The data identified here become the search details on the requisition.

Page Name	Object Name	Navigation	Usage
Define Search Index Fields	SAC_IDX_FIELDS	eProcurement, Administer Procurement, Maintain Supplier Integration Click the Define Search Index Fields link on the Maintain Supplier Integration page.	Specify the record fields to search.
Define Search Query	SAC_SRCH_QRY	eProcurement, Administer Procurement, Maintain Supplier Integration Click the Define Search Query link on the Maintain Supplier Integration page.	Identify how the system searches the index.
Define Search Result	SAC_SRCH_RSLT	eProcurement, Administer Procurement, Maintain Supplier Integration Click the Define Search Result link on the Maintain Supplier Integration page.	Identify how the system displays the results of the search.
Define Search Options	SAC_SRCH_OPTIONS	eProcurement, Administer Procurement, Maintain Supplier Integration Click the Define Search Options link on the Maintain Supplier Integration page.	Identify how the system reads the search request. For example case sensitivity, exact wording, or using a thesaurus.

Defining Source Data Objects

To set up source data objects, use the Define Data Object Set component.

Access the Source Data Object page.



Source Data Object page

To define a source data object:

1. Define the source records that the system uses to retrieve data.

   For example, item data can be retrieved from MASER_ITEM_TBL, PURCH_ITEM_ATTR, and ITM_VENDOR.
2. Define fields for each record, which are used to index as Verity Fields and/or Verity Zones.
3. Define the join conditions that tell the system how multiple records and fields work together.

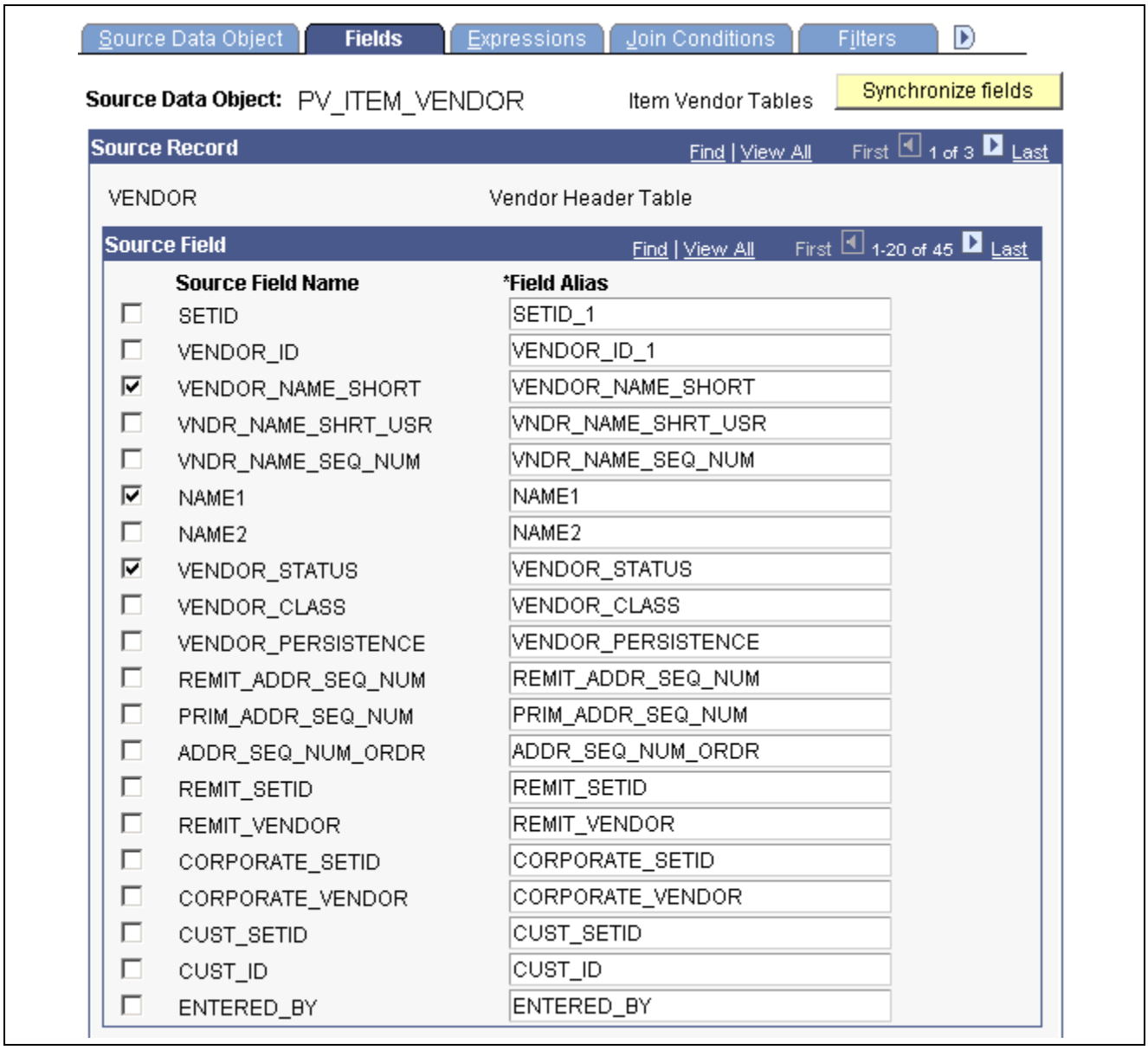
Subject Area Used to group translations sets, transformations, map rules, and map definitions.

Description The description you use to identify the specific source data object.

Source Record Tables where you store fields within the PeopleSoft system, and where you want to define a relationship. For example, you may want to identify a relationship between the *INV_ITEM_ID* in the *Vendor Item Table* and the *Vendor Location Item Table.*

Defining Source Data Object Fields

Access the Fields page to identify fields needed from the source record tables.



Fields page

Select the fields from within the source record that you want to utilize within the source data object. These fields can be utilized with any search index that has this specific source data object as part of the search.

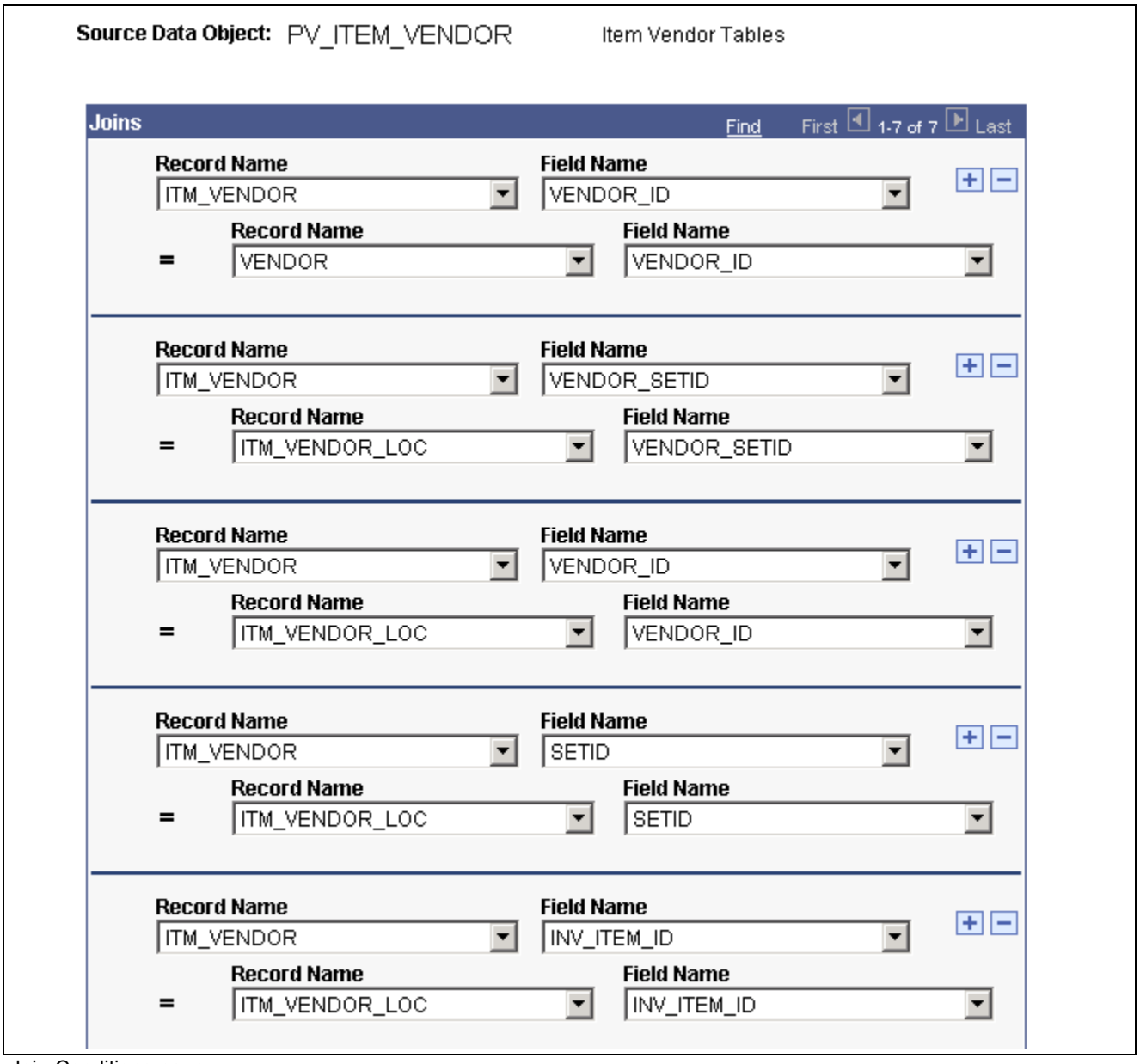
Source Field Name Fields specific to the source record selected.

Field Alias Using the Field Alias field, you can rename the field if you choose.

Synchronize Fields This button is not used for PeopleSoft eProcurement. It is used with PeopleTools integration to Verity.

Defining Source Data Object Join Conditions

Access the Join Conditions page.



Join Conditions page

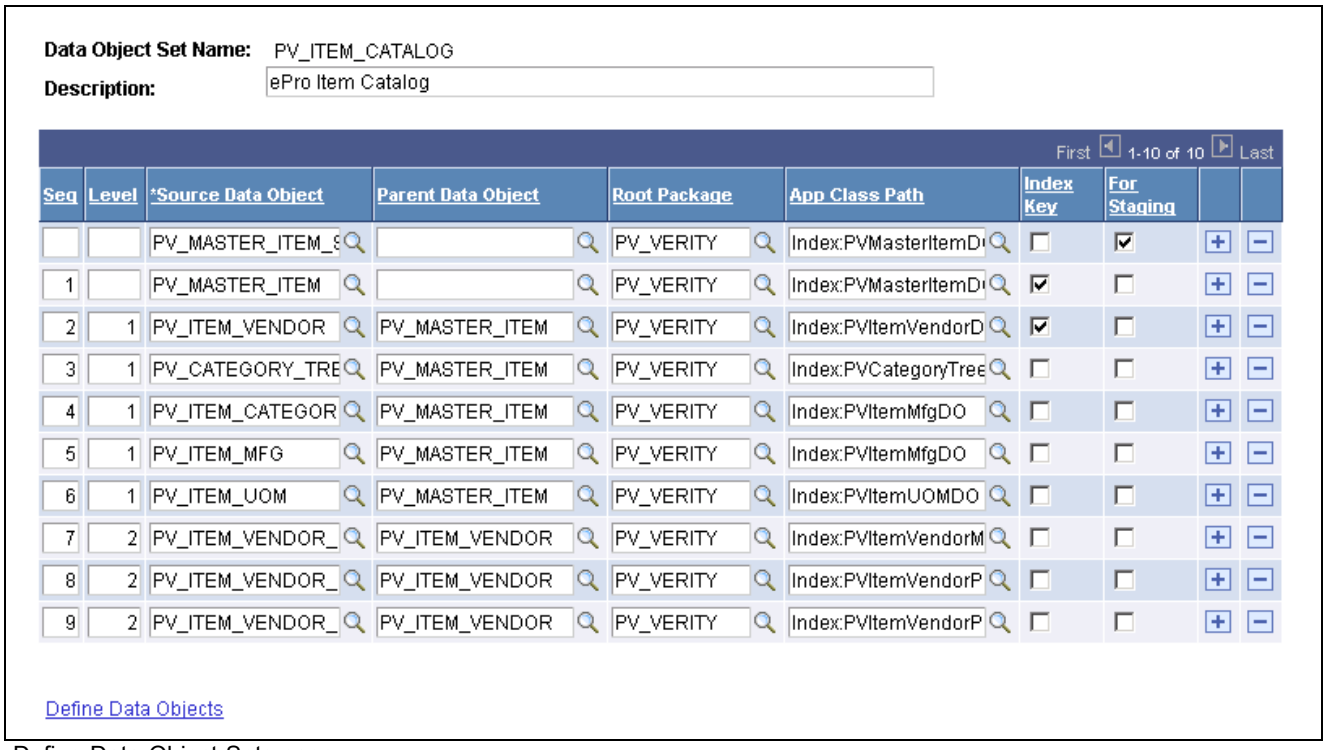
Use this page to join records and fields. If you have two source records identified within the object, you need to tell the system how the two work together. For example, if the you identify the *VENDOR* table and the *ITM_VENDOR* table, you need to identify that the two *VENDOR_ID* fields are the same.

Record Name Define the source record value for the each of the tables you want the system to recognize as the same. The selection values are determined by the source records identified on the Source Data Objects page.

Field Name Define the fields for the specific records that are equal to the field to the related record. The fields are selected on the Fields page.

Defining Source Data Object Sets

Access the Define Data Object Set page.



Data Object Set Name: PV_ITEM_CATALOG

Description: ePro Item Catalog

First 1-10 of 10 Last

Seq	Level	*Source Data Object	Parent Data Object	Root Package	App Class Path	Index Key	For Staging
		PV_MASTER_ITEM_S		PV_VERITY	Index:PVMasterItemDO	☐	☑
1		PV_MASTER_ITEM		PV_VERITY	Index:PVMasterItemDO	☑	☐
2	1	PV_ITEM_VENDOR	PV_MASTER_ITEM	PV_VERITY	Index:PVItemVendorDO	☑	☐
3	1	PV_CATEGORY_TRE	PV_MASTER_ITEM	PV_VERITY	Index:PVCategoryTree	☐	☐
4	1	PV_ITEM_CATEGOR	PV_MASTER_ITEM	PV_VERITY	Index:PVItemMfgDO	☐	☐
5	1	PV_ITEM_MFG	PV_MASTER_ITEM	PV_VERITY	Index:PVItemMfgDO	☐	☐
6	1	PV_ITEM_UOM	PV_MASTER_ITEM	PV_VERITY	Index:PVItemUOMDO	☐	☐
7	2	PV_ITEM_VENDOR_	PV_ITEM_VENDOR	PV_VERITY	Index:PVItemVendorM	☐	☐
8	2	PV_ITEM_VENDOR_	PV_ITEM_VENDOR	PV_VERITY	Index:PVItemVendorP	☐	☐
9	2	PV_ITEM_VENDOR_	PV_ITEM_VENDOR	PV_VERITY	Index:PVItemVendorP	☐	☐

Define Data Objects

Define Data Object Sets page

Use the Define Data Object Sets page to identify one source record on level 0 as the master source record that drives the indexing process. You can also define multiple levels of source records and their processing sequence.

Data Object Set Name A unique identification for a data set object.

Seq (Sequence) The processing sequence.

Level The level number of the source data object. The master data object level is level 0. a subsequent level indicated that the data object is either a child or a peer data object of its parent data object.

Source Data Object The name of the source data object.

Parent Data Object The parent data object for the specific source data object.

Root Package The application package that defines how each field selected from the index will be indexed.

App Class Path (application class path) The application class that defines how each field selected from the source data objects will be indexed.

Note. The application class defined must be an extension to the source data object class and should have an override to the *CustomMapFields()* method. By default *AnyDataObj* application class will be used.

Index Key Identifies the source data objects that have key fields to drive the indexing process.

Note. The index keys are defined on the Define Search Index page.

For Staging	Identifies source data objects that will be used as a staging table during the incremental update process.

Note. To enable incremental updates, a staging table and data object need to be created. The staging data object will be used in place of the master data object during the incremental update.

Enabling the Incremental Update Process

The staging table must satisfy these requirements:

- It must contain the same key fields as the master driving table.
- It must contain one more key field: DTTM_STAMP

The staging data object must satisfy these requirements:

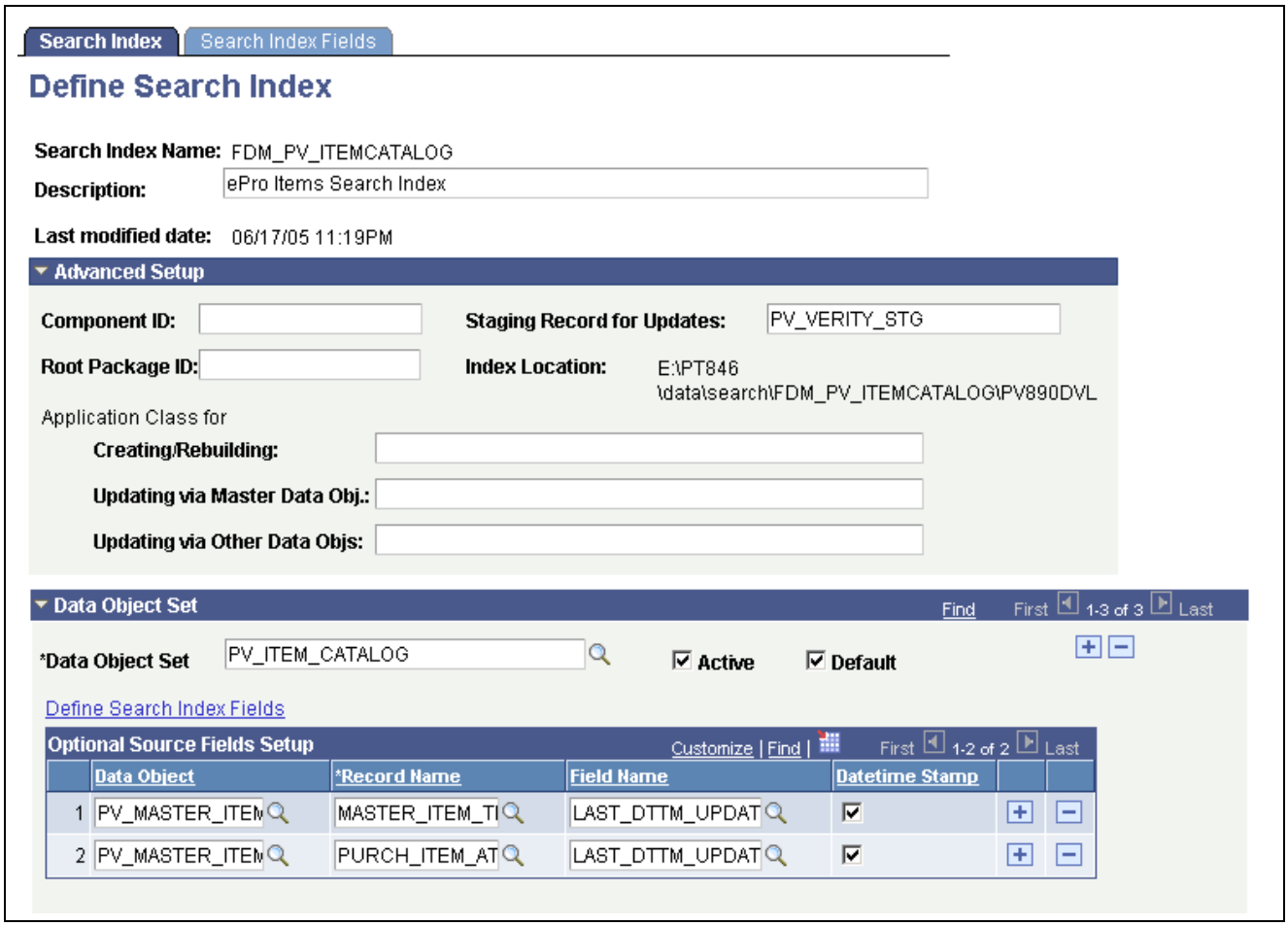
- It must contain a join between the common key fields of the staging table and all the tables available in the master data object.
- It must contain the same number of fields as the master data object. All field aliases should be the same as the field name.

Register this new staging data object in the data object set and mark it as *Stage*.

Defining Search Indexes

To define search indexes, use the Define Search Index component.

Access the Define Search Index page.



Define Search Index page

Use this page to create new search index and assign a specific source data object set for use with the search index.

Search Index Name Name of the search index.

Description Description of the search index.

Component ID Run control that is used to create/update this collection.

Staging Record for Updates The record that stores the keys for incremental updates.

Note. This table must share the same key structure as the master table.

Root Package ID Identifies the application package used for indexing.

Create/Rebuilding The application class extending the AppSearchIndex class that handles creating/rebuilding a new search index.

Update via Master Data Obj. (Update via Master Data Object) The application class extending the AppSearchIndex class that handles updating the search index based on selection criteria on the master table.

Update via Other Data Objs. (Update via Other Data Objects)	The application class extending the AppSearchIndex class that handles updating the search index based on selection criteria on other tables.
Data Object Set	Select a registered data object set to limit data retrieval.
Active	Select *Active* for all source data object sets that the system can use for this index.
Default	Select *Default* to tell the system which data object set should be used to display by default when the user goes to the Build Search Index page.
Datetime Stamp	Identifies the field as a date/time stamp filed. This is used to compare date/time when updating last modified.

For each source data object set, you create a group of source data objects. In the Optional Source Field Setup section of the Search Index page, you can limit the amount of data that is retrieved from each source data object by creating criterion. Set these limits by using the one of the following values:

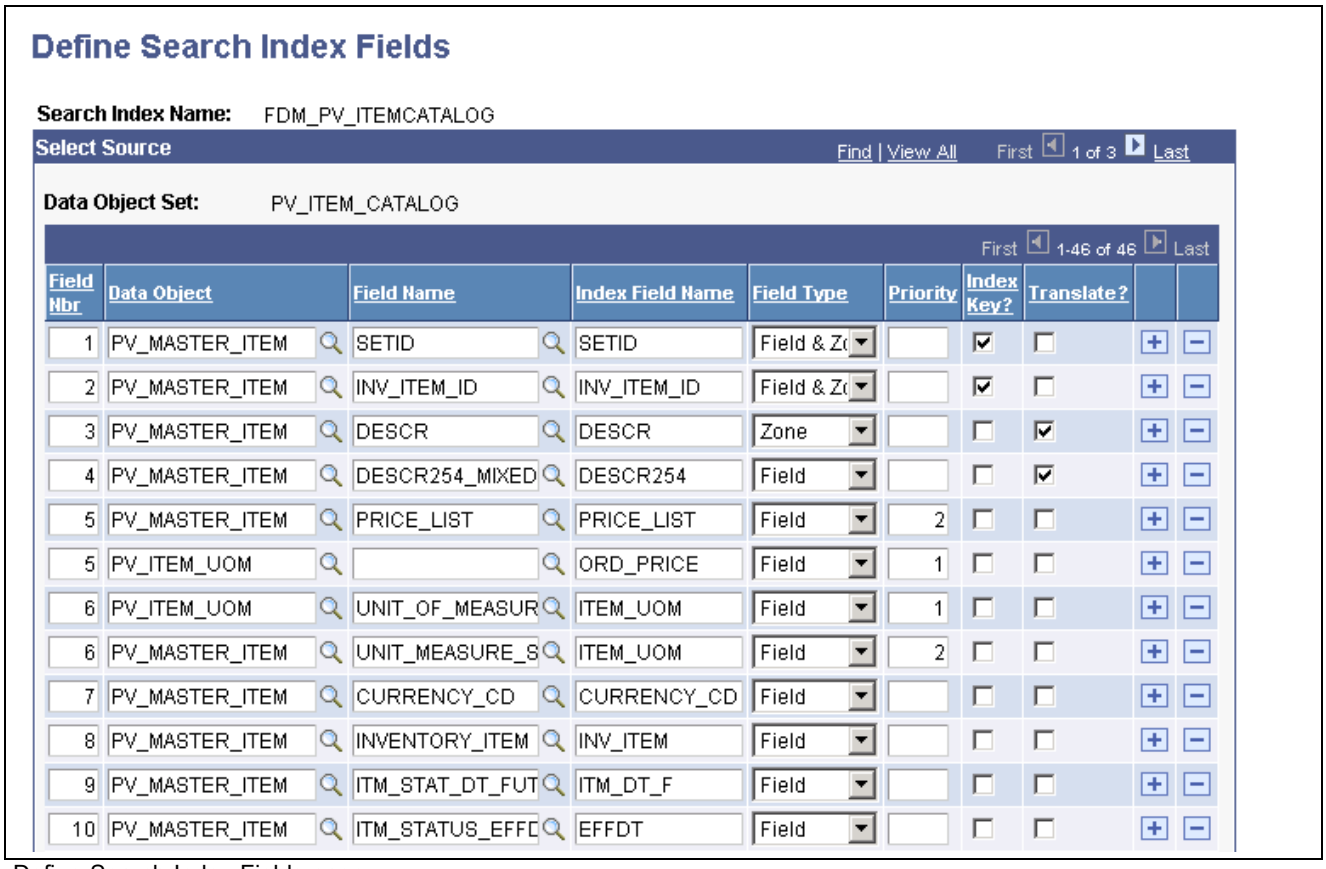
- Defining the search criterion:

<	Less than.
<=	Less than or equal to.
<>	Less or greater than.
=	Equal to.
>	Greater than.
>=	Greater than or equal to.
Between	Between two entries.
LIKE	Similar to.

- Stating the values of the specific field search criterion.

Defining Search Index Fields

Access the Define Search Index Fields page.



Define Search Index Fields page

From the Define Search Index Fields page, you define specific fields that are stored in the search index file.

Data Object Name of the source data object as defined in the data object set assigned to this search index.

Field Name Name of the data object field.

Index Field Name Name of the search index field to be indexed into the collection. This name is defaulted to be the same as the record field name.

Field Type Indexed as a Verity field and/or zone.

Priority Identifies how the system determines which field values to utilize when two or more records contain the same field.

Index Key Indicates fields to drive the indexing process.

Translate Select if the field needs related language processing.

Example: Adding a New Simple Field

These steps extend the search index.

1. Insert a new field to the source data object used by the search index.
2. Identify the new field to be used for Verity indexing on the Search Index Field page.
3. This new field will be picked up in the Verity indexing engine for direct mapping.

Example: Adding a New Field that Requires Customized Processing

These steps allow you to customize the search.

1. Insert a new field to the source data object used by the search index.
2. Identify the new field to be used for Verity indexing on the Search Index Field page.
3. Extend the appropriate source data object class to include special processing.

Example: Adding a New Field from a New Record

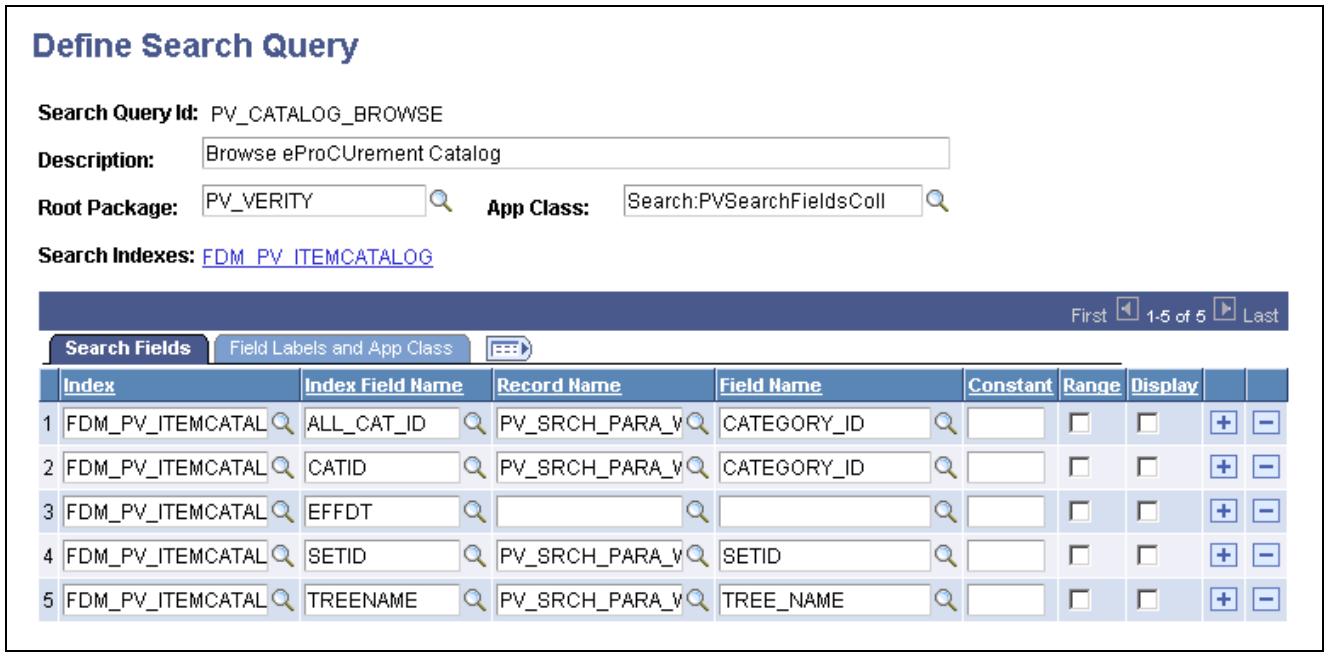
These steps include another record in the search index.

1. Add a new record to the appropriate source data object used by the search index.
2. Identify and insert the new fields from this record in the Data Object Definition page.
3. In the Define Data Object Set page, use the *AnyDataObject* application class to provide default direct mapping from the data object fields to Verity fields.
4. Identify the new field to be used for Verity indexing on the Search Index Field page.
5. Extend the appropriate source data object class to include special processing.

Creating a Search Query

To create Verity searches, use the Define Search Query component.

Access the Define Search Query page.



Define Search Query page

Use the Define Search Query page to define a group of fields for display as users search fields on the transaction search page.

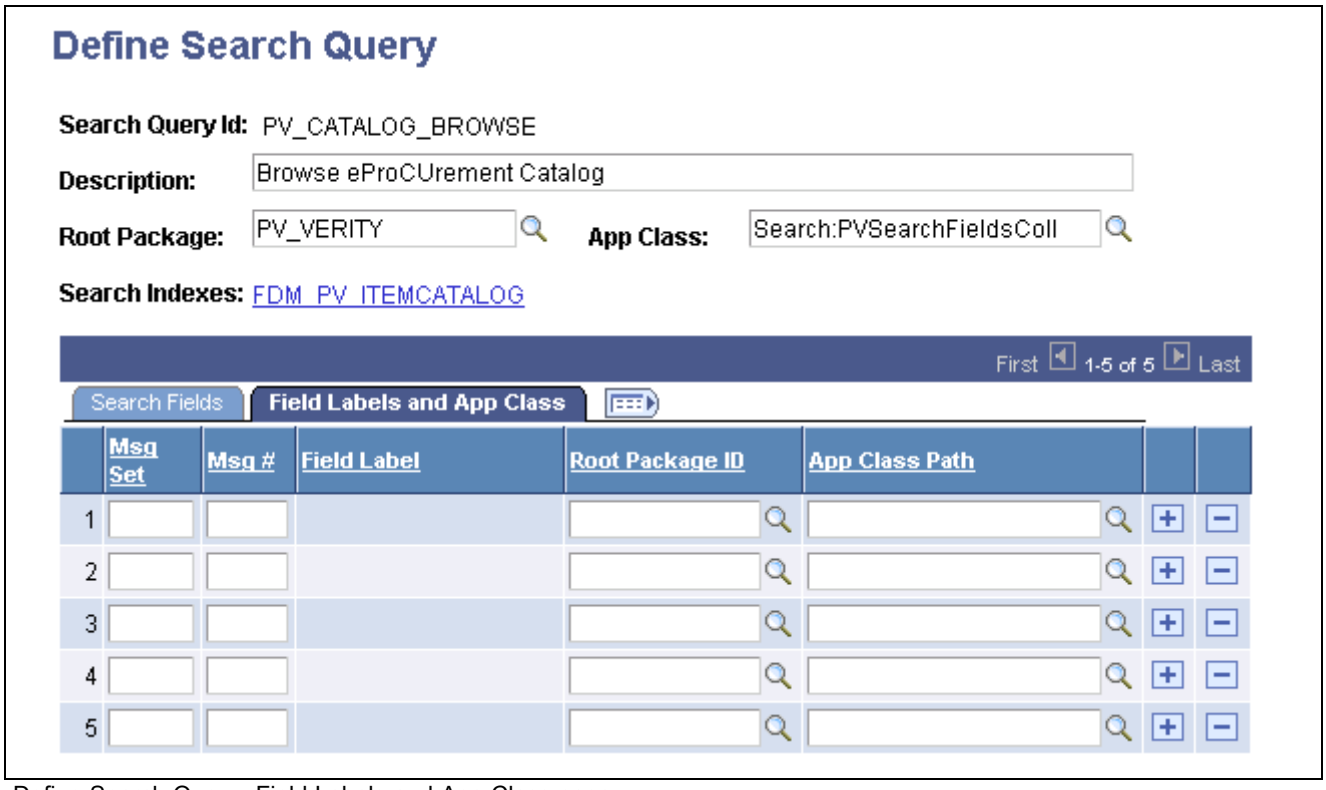
Search Query Id ID for this search query definition.

Description Description for this search query definition.

Root Package	The application package that handles the search query mapping.
App Class (application class)	The application class extending the Format class that controls the formatting logic for the field.
Search Indexes	Use the link to define which search indexes to associate with the result set of this query. You can select more than one index.
Index	Defines the specific index the query utilizes for the search.
Index Field Name	Fields available for the search indexes associate with the selected search indexes.
Record Name	Record names for the work record used in the transaction search scroll.
Field Name	Work record fields that are used to enter search criteria when requesters are performing a search. This can also be fields that the system uses to populate search criterion in the background, for example SetID.
Constant	Search criteria that must always equal a specific, non-changing, value.
Range	Identifies that the search can be given a range. For example, *Price* can equal any where from $20.00 USD to $25.00 USD.
Display	Specify whether the field is a background search criterion or a user-defined search criterion.

Defining Field Labels for Custom Searches

Access the Define Search Query: Field Labels and App Class page.



Define Search Query: Field Labels and App Class page

If you are creating a new query, you have two options to display search fields on the query page. You can either hard-code each field using Application Designer, or you can dynamically populate the searchable fields. The Field Labels and App Class tab is where you use messages to define field labels when the work grid is dynamically populated.

Msg Set (message set)	Message set displayed as the search field label.
Msg # (message number)	Message number displayed as the search field label.
Root Package ID	Application package ID for the specific field label.
App Class Path (application class path)	Application class for the specific field label.

When the transaction search page is displayed, the following information is populated on the page:

- Work record used for the search fields.

  For example, the user sees description.
- Work record used for the search fields by range, if any.

  For example, the user can enter a price range.
- Work record used for the search options grid.

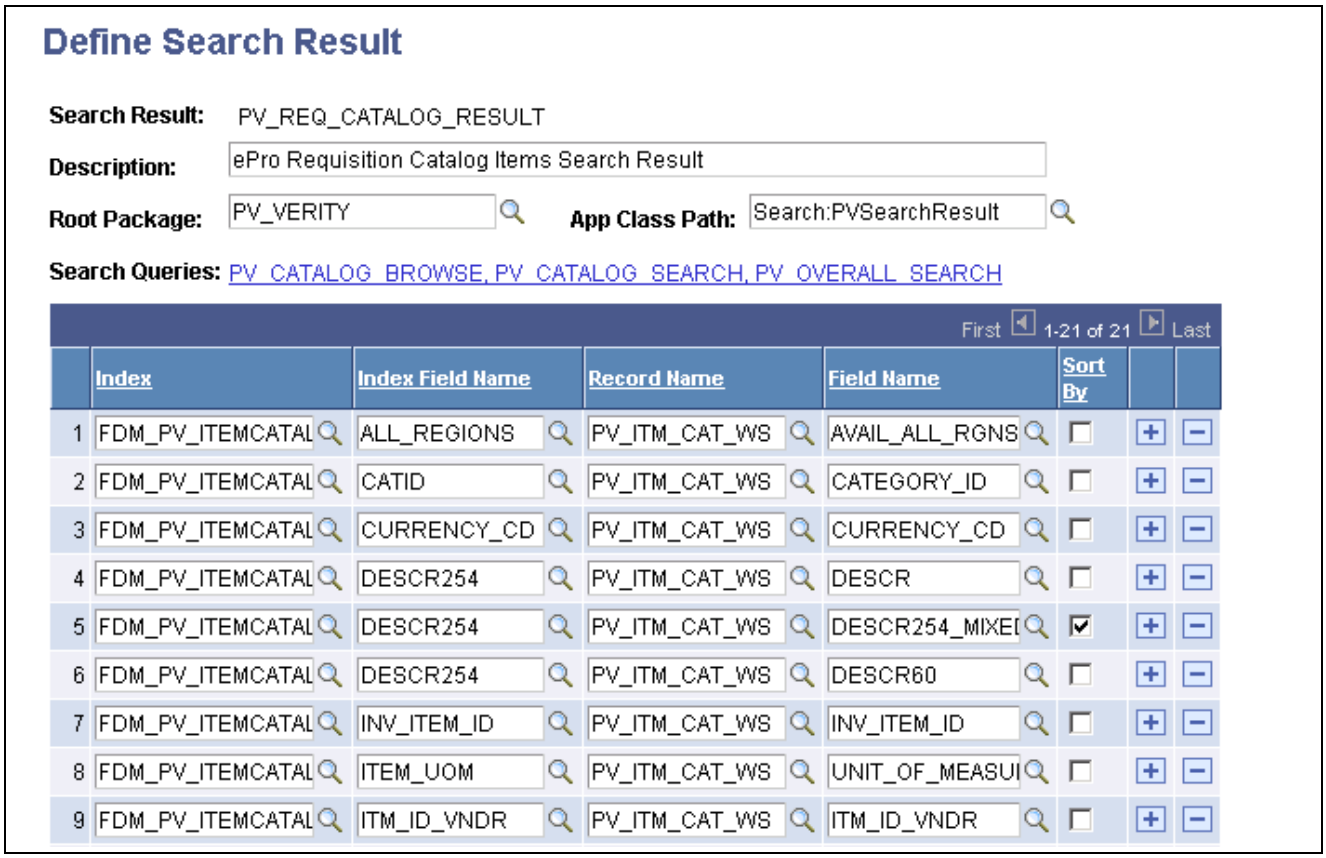
  For example, the user can elect to use exact words or synonyms.

Note. Other fields, such as *Currency* in the case or price range, need to be manually created.

Displaying Search Results

To display search results, use the Define Search Results component.

Access the Define Search Result page.



Define Search Result page

Based on how you elect to display your search results, the values returned from the Verity search index are mapped to the appropriate component record fields.

Search Result ID for this search result definition.

Description Description for this search result definition.

Root Package The application package that handles the search result mapping.

App Class (application class) The application class that handles the search result mapping.

Search Queries Identifies the search queried that are associated with this result set.

Index Defines the specific index the query utilizes for the search.

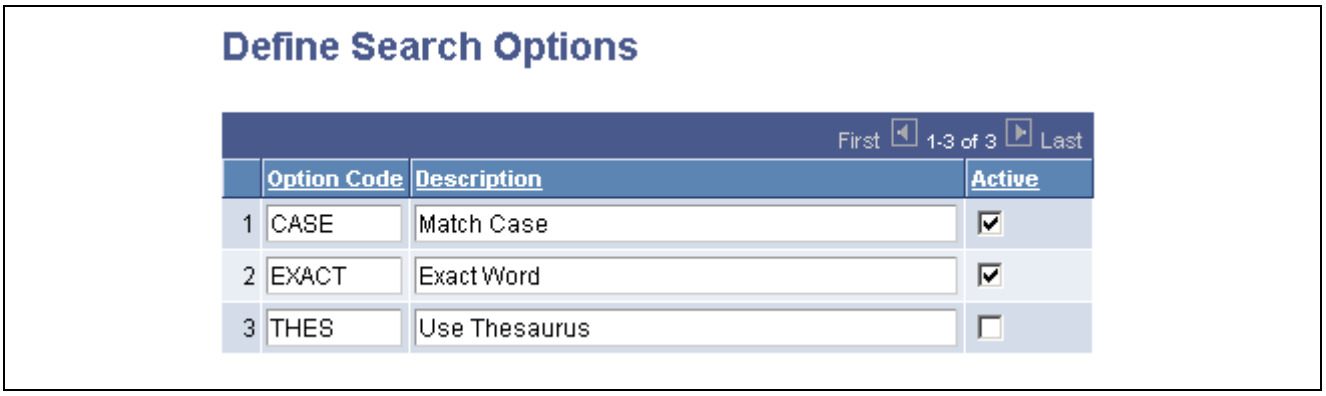
Index Field Name Fields available for the search indexes associate with the selected search indexes.

Record Name Record names for the work record used in the transaction search result scroll.

Field Name Work record fields that are used to store values of an index field returned after executing a search.

Defining Search Options

Access the Define Search Options page.



Define Search Options page

Use the Define Search Options page to enable users to search using these options:

CASE Activate *CASE* if you require the search to be case sensitive.

EXACT Activate *EXACT* if you require the user to have the exact word match.

THES Activate *THES* if using the thesaurus.

Maintaining the Verity Thesaurus

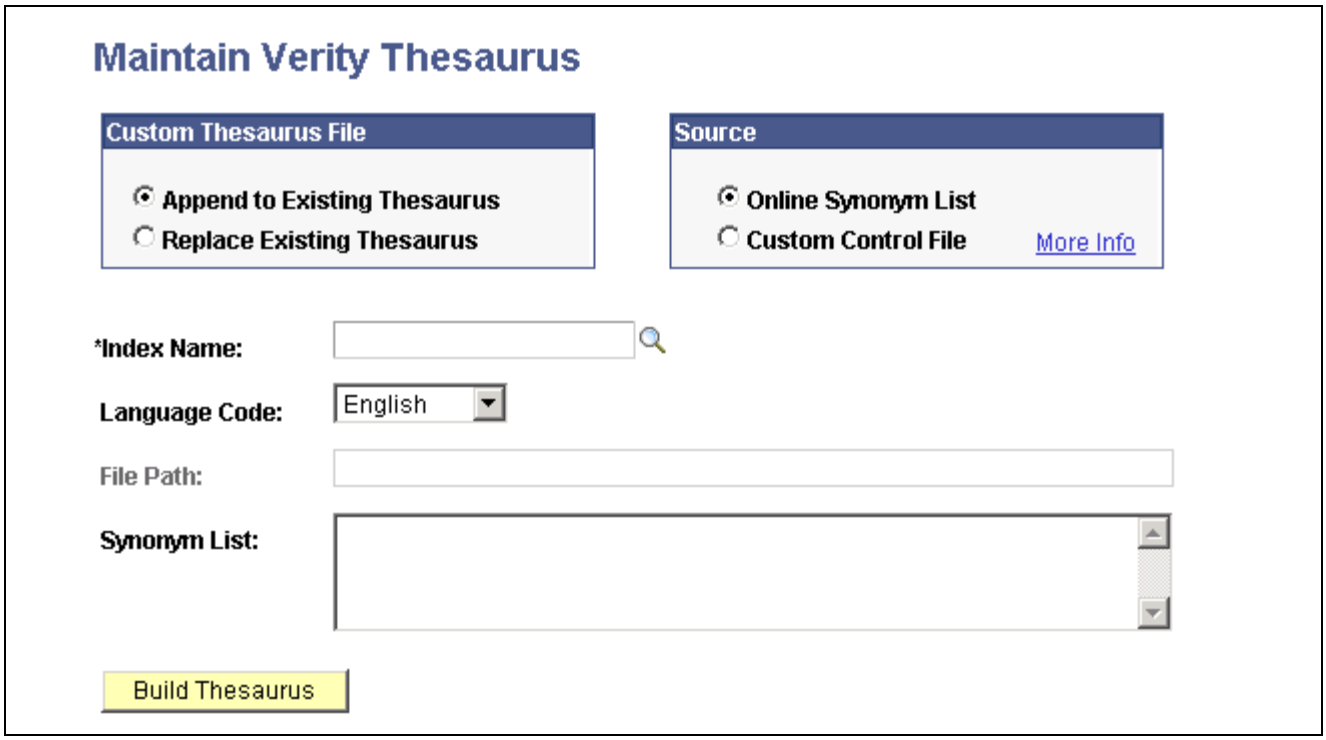
This section discusses how to maintain the Verity thesaurus.

Page Used to Maintain the Verity Thesaurus

Page Name	Object Name	Navigation	Usage
Maintain Verity Thesaurus	SAC_SRCH_THESAURUS	eProcurement, Administer Procurement, Maintain Supplier Integration Click the Maintain Verity Thesaurus link on the Maintain Supplier Integration page.	Create a new thesaurus or modify the existing thesaurus for item search.

Maintaining the Verity Thesaurus

Access the Maintain Verity Thesaurus page.



Maintain Verity Thesaurus page

Verity delivers a default thesaurus for each language. Each language has a file named *VDk30.syd*.

Append to Exiting Thesaurus	Add your own synonyms to the default thesaurus.
Replace Existing Thesaurus	Remove the existing copy of the default thesaurus, and replace it with your own.
Online Synonym List	Add a list of synonyms.
Custom Control File	When you have a large amount of synonyms to add, you can create a file instead of typing each one into the synonym list online.
More Info	Formatting instructions for the Online Synonym List and the Custom Control File.
Index Name	Identify the index using the thesaurus.
Language Code	Each language is delivered with its own default thesaurus. The language selected here identifies which default thesaurus is updated.
File Path	If you are using Custom Control Files, identify the file location here.
Synonym List	Enter the online list of synonyms.

CHAPTER 6

Working with the Printable Documents Framework

This chapter provides an overview and discusses how to use the Printable Documents Framework.

Understanding the Printable Documents Framework

This section discusses:

- The printable document framework.
- The printable document object.
- The printable document properties and methods.

The Printable Document Framework

The Printable Documents Framework enables the creation of a real-time, printable document within the context of any online transaction. This printable version functionality is a common web feature that removes non-printable content from a web page (such as images, frames, buttons) for ease of printing. This framework removes the need to schedule a job to produce simple, straightforward transactional reports for printing. This printable version functionality supports these transactions:

- Counter sale goods receipt
- Counter sale pick plan
- Deposit refund
- Cash drawer receipt

If you want to add printable version functionality to any other online transaction in the system, then you can leverage the Printable Document Object to assist you with this type of configuration.

Note. In order to view the goods receipt, pick plan, deposit receipts and cash drawer receipts, you will need to grant full security access to the Web Libraries on your permission list for the iscripts located in the web library WEBLIB_SCM_UTIL. These iscripts are HTMLAREA.FieldFormula.IScript_isPrintReady and HTMLAREA.FieldFormula.IScript_PrintDoc.

See Chapter 6, "Working with the Printable Documents Framework," Using the Printable Documents Framework, page 140.

The Style Repository within the Printable Document Framework provides the ability to define the stylesheet to use with the Printable Document Framework reports. In addition, this repository allows you to customize the stylesheet(s) and override a given stylesheet for reports at the business-unit level so that a different look and feel can be created for reports for each business unit.

Note. The Printable Document Style component is shipped as system data and should be updated by the developers adding reports to the Printable Document Framework. You populate the Printable Document Style By Business Unit component if you want to change the default stylesheet by business unit for a report within the Printable Document Framework.

The Printable Document Object

If you want to add printable version functionality to any other online transaction in the system, then you can leverage the Printable Document Object to assist you with this type of configuration

To leverage the Printable Document Object within PeopleTools:

1. Add a translate value to the SCM_REP_TYPE field for your report.

   This field is a CHAR(4) that contains the list of the valid SCM Reports for use with the SCM Printable Document Framework. These values are shipped for this field:

   - *BICR* (Billing Cash Receipt)
   - *BIDR* (Billing Deposit Receipt)
   - *OMGR* (Order Management Goods Receipt)
   - *OMPK* (Order Management Pick Plan)

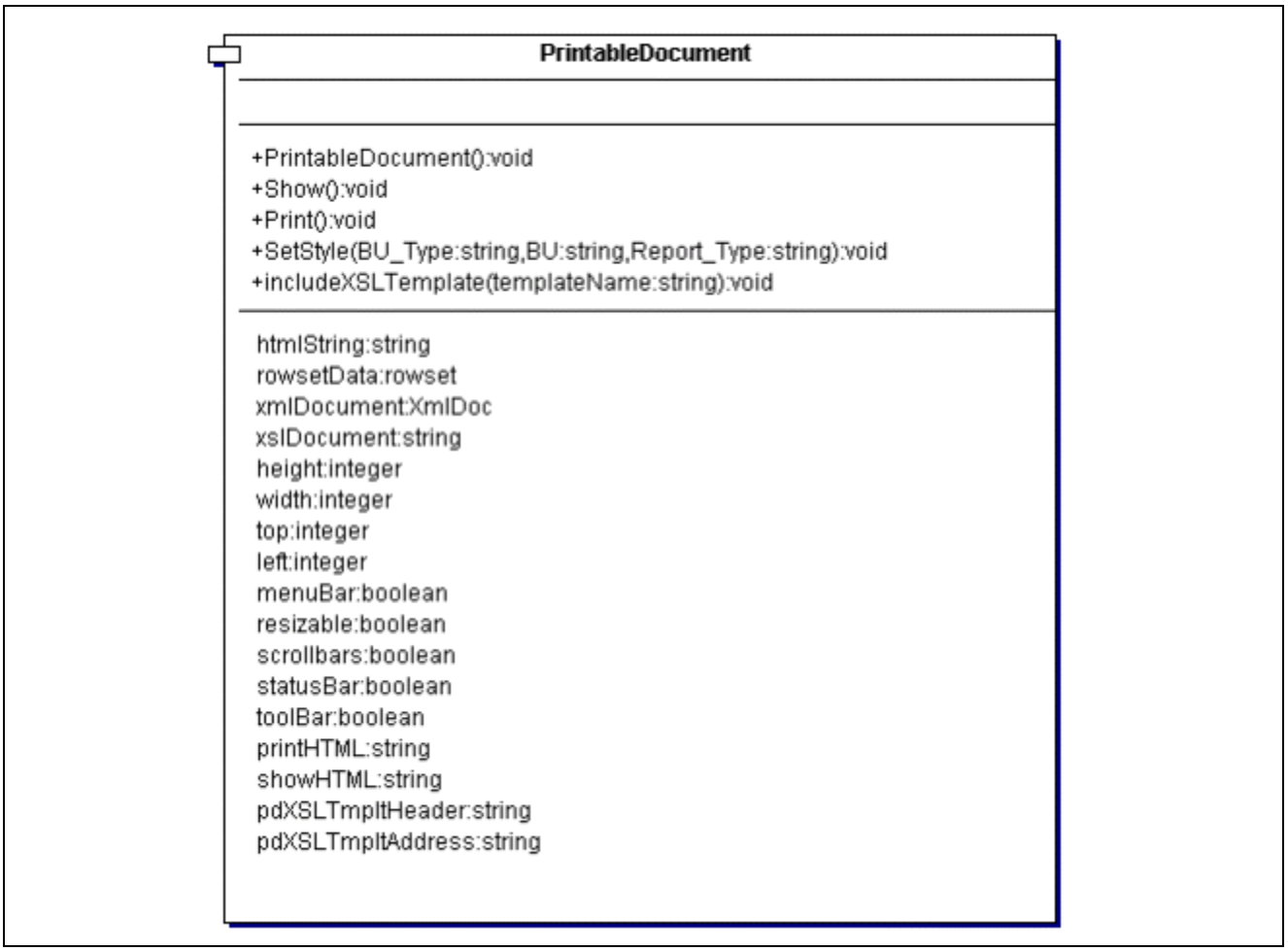
2. Once you have added the translate value, there are two options:
   - Add the SAC_RPT_SUB subpage to your page at Level0.

     This subpage contains an HTMLArea (DERIVED_HTML.HTMLAREA) that does not display any information to the user. Instead, this HTMLArea is used to pop up or print your printable document in the background by the Printable Document Framework.
   - If you already have a HTMLArea on your page, you can omit the delivered subpage and simply assign the values returned by the PrintableDocument object properties showHTML or printHTML to the HTMLArea on your page.
3. Add PeopleCode to the page to create and display (or directly print) the printable document.

   Note. This PeopleCode can be behind FieldChange on a pushbutton / hyperlink, behind RowInit, or anywhere that you can to initiate the Printable Document logic. This code is used for either launching a popup window that displays your printable document (showHTML) or for sending your printable document directly to a print dialog (printHTML).

Your PeopleCode must instantiate the PrintableDocument object (SCM_UTILITES:PrintableDocument) to generate a report. This PrintableDocument object accepts a rowset, an XML document or a HTML string as valid data sources in order to generate a report. If you choose the rowset or XML document data source, then you must populate the XSLDocument property in order to translate the data into HTML for display. This XSLDocument can be populated directly or you can use the Print Document Framework Style Repository using the SetStyle() method to retrieve the report stylesheet. If the report data is already in HTML format, then no translation is needed and the XSLDocument property does not need to be set.

This figure shows the Printable Document Object Class:



Printable Document Class

A sample PeopleCode instantiation of the Printable Document Object class might be:

```
/*Import the Printable Document*/
import SCM_Utilities:PrintableDocument;

/*Instantiate the PrintableDocument Object*/
Local SCM_UTILITIES:PrintableDocument &pDoc;

/*Add code to create a local rowset withthe data needed for printing*/
Local Rowset &rs;
...
&pDoc.RowsetData=&rs;

/*Set the stylesheet*/
&pDoc.SetStyle("OM", "US001", "OMGR");

/*Show the Printable Document*/
&pDoc.Show();
```

Printable Document Object Methods and Properties

This section provides an overview of the methods and properties available for use with the Printable Document Object.

Methods

The PrintableDocument object has a number of methods you can call:

Method	Use	Additional Information
Show ()	Use this method to display your report as a popup document.	Just before launching the popup window, you can set various display properties on the PrintableDocument object to control the size and placement of the popup. You can also control what additional elements are displayed in the popup. For example, you can turn on/off the toolbar, menu and/or scroll bars. Any attributes that are not set default from the client's browser environment.
Print ()	Use this method to send your report to a print dialog.	While the Show() method may be used to display pure XML in a popup window for the user to then manually print, the Print() method throws an exception if there is no XSL document to transform the XML. This occurs because JavaScript can only invoke its print() and close() methods on a window that contains HTML. Attempts to print or close a window with only XML fail, and thus the user is presented with a small, confusing, orphaned window.

Method	Use	Additional Information
SetStyle(&BU_Type, &BU, &Report_Type)	Use this method to set the XSLDocument property based on the Printable Document Framework Repository.	&BU_Type: *OM* for Order Management or *AR* for Accounts Receivable. &BU: an *OM* or"*AR* Business Unit &Report_Type: a valid translate value on the SCM_REP_ TYPE field
includeXSLTemplate(&templateName as string)	Use this method to include XSL templates stored in HTML objects into an existing XSLDocument.	There are several templates shipped with the product. Include these templates by passing to the includeXSLTemplate() method any PrintableDocument properties having names beginning with "pdXSLTmplt." It is not recommended that you directly pass in the HTML object names of these standard templates, as some require the inclusion of other templates to work properly. Using the pdXSLTmplt properties ensures that any other required templates are included as well.

Properties

The properties available for use with the Printable Document Object include:

Property	Use	Examples, Additional Parameters

rowsetData	Use this property to set the datasource for your report using a rowset.	Example for setting the pop up window attributes:
		`&pDoc.Height=400;`
		`&pDoc.Width=600;`
		`&pDoc.MenuBar=False;`
		`&pDoc.StatusBar=True;`
		`&pDoc.Resizeable=True;`

XMLDocument	Use this property to set the datasource for a report using a XMLDoc or fetch the XMLDoc result from your rowsetData (convert a rowset to XML)	
XSLDocument	Use this property to set the XSL Stylesheet or to fetch the XSL Stylesheet generated by the SetStyle() method.	
HTMLString	Use this property to set the HTMLString for display or fetch the HTMLString generated from the XMLDocument and XSLDocument.	

Property	Use	Examples, Additional Parameters
printHTML	Use this property if you already have an HTMLArea on the page, and can use it instead of including the delivered sub-page.	
showHTML	Use this property if you already have an HTMLArea on the page, and can use it instead of including the delivered subpage.	
pdXSLTmpltHeader	This is a delivered template for document headers. It puts the company logo in the upper left corner of the page, company address in the upper right, and document title centered and below the other two.	Parameters (any parameters omitted will not show in the address block): name — Piece of the address block address1 — Piece of the address block address2 — Piece of the address block address3 — Piece of the address block city — Piece of the address block state — Piece of the address block postal — Piece of the address block reportTitle — The title for the report
pdXSLTmpltAddress	This is a delivered template for address blocks.	Parameters (any parameters omitted will not show in the address block): msgStr — A label for the address block name — Piece of the address block address1 — Piece of the address block address2 — Piece of the address block address3 — Piece of the address block city — Piece of the address block state — Piece of the address block postal — Piece of the address block

Using the Printable Documents Framework

The Style Repository within the Printable Document Framework provides the ability to define the stylesheet to use with the Printable Document Framework reports. In addition, this repository allows you to customize the stylesheet(s) and override a given stylesheet for reports at the business-unit level so that a different look-and-feel can be created for reports for each business unit.

Note. The Printable Document Style component will be shipped as system data and should be updated by the developers adding reports to the Printable Document Framework. You will populate the Printable Document Style By Business Unit component if you want to change the default stylesheet by Business Unit for a report within the Printable Document Framework.

The Printable Document Framework supports the following meta-HTML variables within your XSL Stylesheet (Content Name):

- %REPORT_LOGO — This meta-variable is replaced with the image entered in the Report Logo field at run time.
- %Bind(:1) thru %Bind(:4) — These meta-variables are replaced with the context entered in the Sub Content Name fields at run time.

Pages Used for the Printable Documents Framework

Page Name	Object Name	Navigation	Usage
Printable Document Style	SAC_RPT_XSLT	Set Up Financials/Supply Chain, Common Definitions, Printable Documents, Default Report Style	Use to define the default style sheet to be used for printable documents.
Printable Document Style By BU	SAC_RPT_XSLT_BU	Set Up Financials/Supply Chain, Common Definitions, Printable Documents, Report Style By BU	Use to define override style sheets to be used when printing documents for a given business unit.

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.

academic career In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

academic institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

academic organization In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration,

PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

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.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

	courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
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.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
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 activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

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 process A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business task The name of the specific function depicted in one of the business processes.

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.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

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.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

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.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

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.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

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.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.

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.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

cost-plus contract line A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.

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.

course In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

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 cube In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.

data elements Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

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

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

	See also *population* and *cohort*.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure

your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

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.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

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.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GL business unit Abbreviation for *general ledger business unit*. A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit*.

GL entry template Abbreviation for *general ledger entry template*. In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process*. In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

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.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access*.

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations.

	You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
KPI	An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
LDIF file	Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

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

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine*.

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

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

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

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

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

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

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

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

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

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

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

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

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

See also *compensation object.*

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

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

payment shuffle In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

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 component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode event See *event.*

PeopleSoft Pure 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.

person of interest A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

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.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort*.

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.

primacy number In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

primary name type In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

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 A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.

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.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.

product line The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

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.

prospects In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

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

See *record input VAT flag.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

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

reference object In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing

	model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
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.
SCP SCBM XML message	Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
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.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
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.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

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 key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

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.

speed key See *communication key.*

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.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft system.

	For example, processes that import data from Microsoft Project into PeopleSoft applications create transaction rows with a source code of MSP (Microsoft Project).
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.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
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.
third party	A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.
3C engine	Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
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.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

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.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access.*

user interaction object In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

VAT exception Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worker A person who is part of the workforce; an employee or a contingent worker.

workset A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.

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 link The XML Linking language enables you to insert elements into XML documents to create a links between resources.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

XPI Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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