PeopleSoft®

PeopleSoft Enterprise Catalog Management for Financials, Enterprise Service Automation and Supply Chain Management 8.9 PeopleBook

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PeopleSoft Enterprise Catalog Management for Financials, Enterprise Service Automation and Supply Chain Management 8.9 PeopleBook
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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 Catalog Management for Financials, Enterprise Service Automation and Supply Chain Management Preface

This preface provides a list of common elements and an overview of PeopleSoft Catalog Management.

PeopleSoft Catalog Management

PeopleSoft Catalog Management offers a unique solution to catalog integration. It simplifies catalog aggregation and maintenance by enabling organizations to build and maintain taxonomies, define transformation and cleansing rules, import and update partner content, automatically categorize products, manage catalog versions, and syndicate catalog content. PeopleSoft Catalog Management resolves the issues associated with catalog aggregation and maintenance, and ensures successful web-based implementation of applications requiring catalog content.

In PeopleSoft Catalog Management, an *enterprise* is the company (organization, distributor, service provider) that has purchased PeopleSoft Catalog Management and maintains the enterprise catalog. A *partner* is a company that supplies product or services that are then resold or purchased by the enterprise. Partners are often referred to as suppliers.

Common Elements Used in This PeopleBook

Offering ID and Description

The catalog offering ID and offering description fields are named differently based on the catalog type. For example:

Procurement: Item ID.

Customer: Product ID.

Training: Catalog Item ID.

Note. There are also variations of some other fields based on catalog type.

Screenshots for this book were taken using a procurement catalog.

Partner ID and **Version**

Values are based on the selected partner catalog selected on the Enterprise Catalog Console page.

SetID and **Catalog ID**

Values are based on the selected enterprise catalog on the Catalog Management Home page.

CHAPTER 1

Getting Started With PeopleSoft Catalog Management

This chapter provides an overview of PeopleSoft Catalog Management and discusses:

- PeopleSoft Catalog Management business processes.
- PeopleSoft Catalog Management integrations.
- PeopleSoft Catalog Management implementation.

PeopleSoft Catalog Management Overview

PeopleSoft Catalog Management simplifies catalog content integration, enabling organizations to:

- Register and maintain catalog partners.
- Import and update partner content.
- Define transformation and filtering rules to convert content.
- Build and maintain category hierarchies.
- Automatically categorize product offerings.
- Manage enterprise catalog and partner catalog versions.
- Syndicate catalog content.

See Also

Chapter 4, "Setting Up PeopleSoft Catalog Management," Registering Catalog Partners, page 22

Chapter 6, "Importing Partner Source Files," page 35

Chapter 7, "Mapping, Transforming, and Loading Partner Source Data," page 51

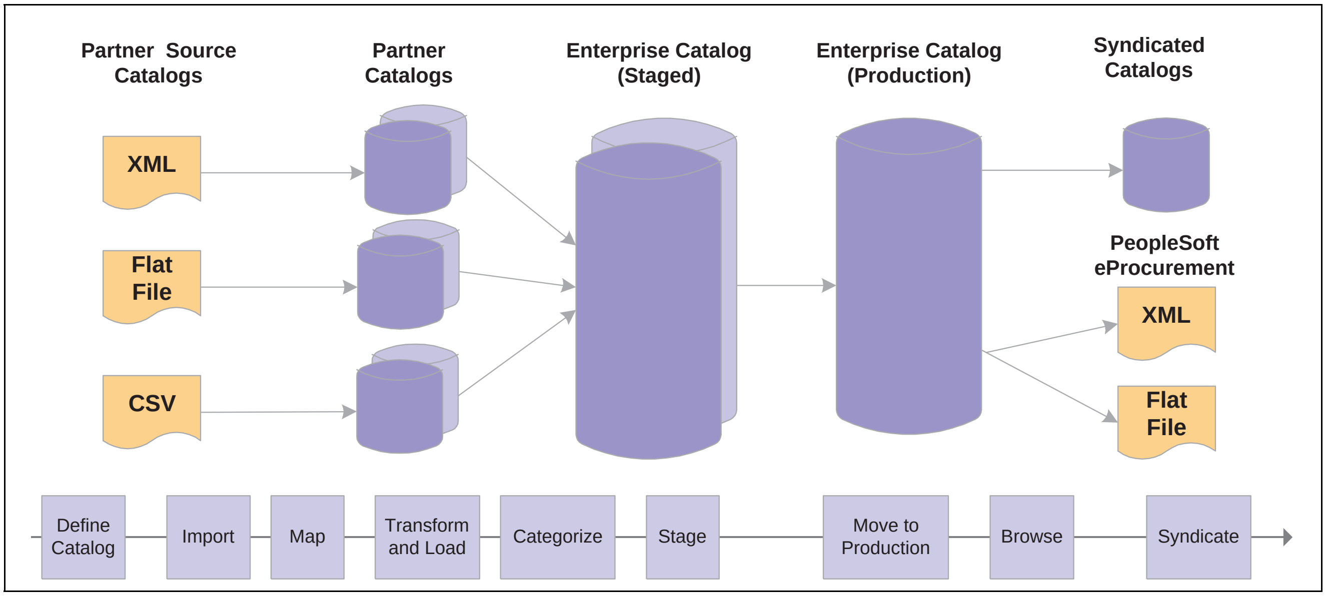
Chapter 8, "Categorizing Offering Data," page 65

Chapter 9, "Staging and Browsing Partner Offerings," page 83

Chapter 10, "Producing and Syndicating Enterprise Catalogs," page 89

PeopleSoft Catalog Management Business Processes

The following diagram illustrates the catalog management process flow:

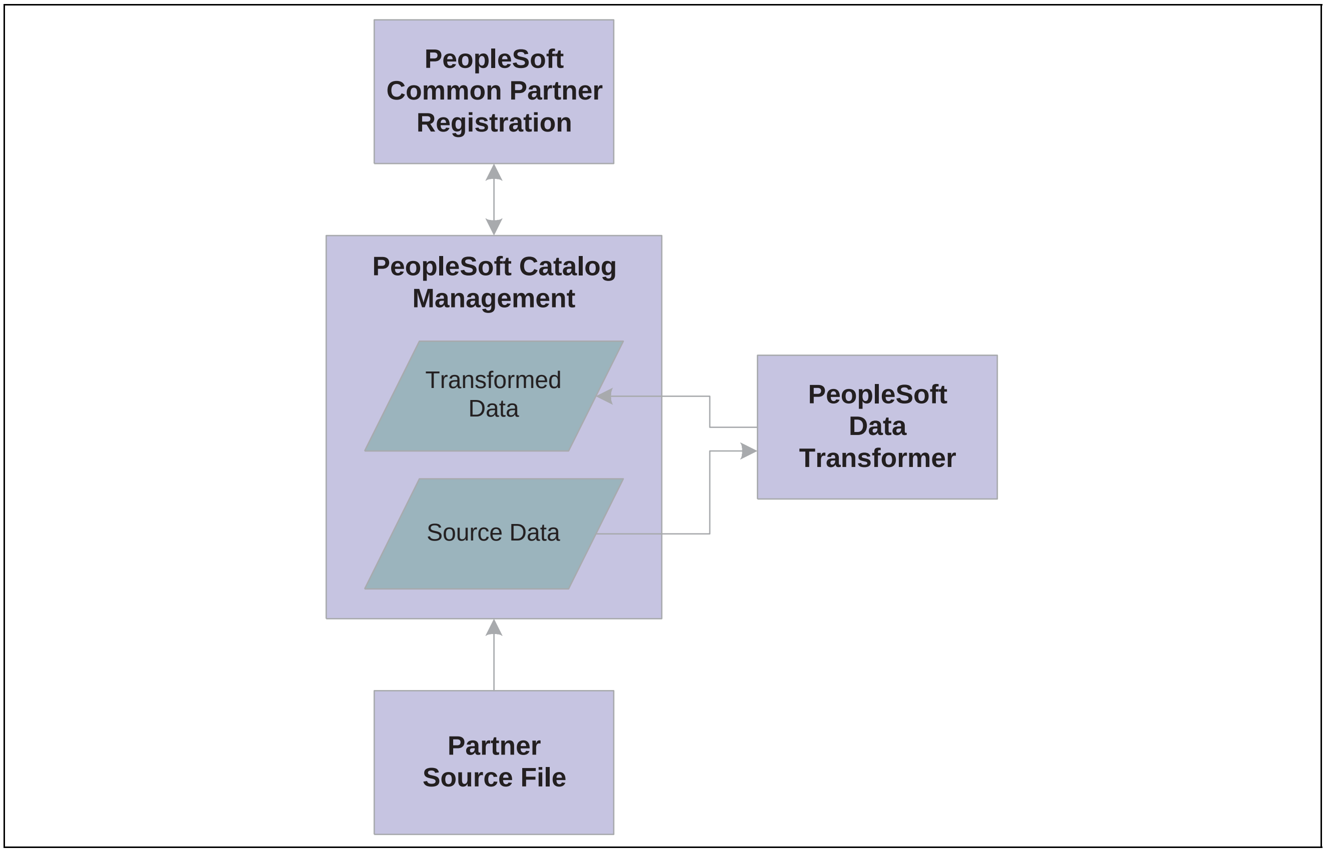


PeopleSoft Catalog Management business process flow

We discuss these business processes in the business process chapters in this PeopleBook.

PeopleSoft Catalog Management Integrations

PeopleSoft Catalog Management integrates with the following PeopleSoft products:



PeopleSoft Catalog Management integration flow with other PeopleSoft products

We discuss integration considerations in the implementation chapters of this PeopleBook.

PeopleSoft Catalog Management Implementation

PeopleSoft Catalog Management implementation can be divided into the following activities:

- Store attachment files.
- Define installation options.
- Create categories and category hierarchies.
- Create enterprise catalog definitions.
- Register partners.

In the planning phase of the implementation, take advantage of all PeopleSoft sources of information, including the installation guides and business process maps.

Storing Attachment Files

PeopleSoft Catalog Management allows you to capture, store, and utilize attributes related to an offering.

Step	Reference
1. Define the URL identifier for the file server where you are storing attachments.	*Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft System and Server Administration*

Defining Installation Options

PeopleSoft Catalog Management installation options are entered at the time of implementation:

Step	Reference
1. Define PeopleSoft Catalog Management installation options.	Chapter 4, "Setting Up PeopleSoft Catalog Management," Defining Installation Options, page 14
2. Define fields for categorization rules.	Chapter 4, "Setting Up PeopleSoft Catalog Management," Selecting Fields for Categorization Rules, page 16
3. Define default workflow notifications.	Chapter 4, "Setting Up PeopleSoft Catalog Management," Defining Default Workflow Notifications, page 16

Creating Categories and Category Hierarchies

With PeopleSoft Catalog Management, you can either create categories and category hierarchies, or you can use the United Nations Standard Products and Services Classification Code (UNSPSC).

Step	Reference
1. Create categories.	Chapter 4, "Setting Up PeopleSoft Catalog Management," Creating Categories, page 18
2. Create category hierarchies.	Chapter 4, "Setting Up PeopleSoft Catalog Management," Creating Category Hierarchies, page 19
3. Load UNSPSC.	Chapter 4, "Setting Up PeopleSoft Catalog Management," Loading Hierarchies, page 21

Creating Enterprise Catalog Definitions

The following table describes the steps required to create an enterprise catalog definition of a given type.

Step	Reference
1. Define general catalog information.	Chapter 5, "Creating Enterprise Catalog Definitions," Defining General Catalog Information, page 29
2. Assign enterprise managers and grant privileges.	Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Enterprise Managers and Granting Privileges, page 30
3. Assign partners and grant privileges.	Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Partners and Granting Privileges, page 31
4. Associate category hierarchies.	Chapter 5, "Creating Enterprise Catalog Definitions," Associating Category Hierarchies, page 33

Step	Reference
5. Specify workflow options.	Chapter 5, "Creating Enterprise Catalog Definitions," Specifying Workflow Options, page 33

Registering Partners

The catalog administrator can register partners within PeopleSoft Catalog Management. The system automatically approves the registration and updates PeopleSoft Maintain Catalog Partners.

Step	Reference
1. Create Provide Catalog Information and View Catalog Information services within PeopleSoft Maintain Catalog Partners. In order to register partners in PeopleSoft Catalog Management the provide and view catalog information services must be created within the PeopleSoft Maintain Catalog Partners component.	Chapter 1, "Getting Started With PeopleSoft Catalog Management," Creating Enterprise Catalog Definitions, page 4
2. Register partners.	Chapter 4, "Setting Up PeopleSoft Catalog Management," Registering Catalog Partners, page 22
3. Associate users with registered partners.	Chapter 4, "Setting Up PeopleSoft Catalog Management," Adding New Partner Information, page 23

CHAPTER 2

Understanding PeopleSoft Catalog Management

This chapter provides an overview of Catalog Management and discusses how to:

- Manage partner processes.
- Create category hierarchies.
- Define transformations.
- Define categorization.
- Create versioning.
- Archiving and purging.
- Manage security.
- Define roles.

Manage Partner Processes

Catalog Management enables the organization to share catalog content with partners. Partners can import and manage their own content. Partners can:

- Define the catalog source.
- Import, transform, and load content into the catalog.
- Categorize offering data and review categorization results.
- Stage approved catalog offerings.
- Manually update their data.
- Browse staged and production versions of the enterprise catalog.

See Also

Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Partners and Granting Privileges, page 31

Create Category Hierarchies

With Catalog Management, you can either create categories and category hierarchies, use the United Nations Standard Products and Services Classification code (UNSPSC), or use PeopleSoft trees. You can support multiple hierarchies within a catalog in order to syndicate content for customers or partners using their preferred category hierarchy. You can:

- Add and maintain categories.
- Rearrange the category hierarchy.
- Create an unlimited number of category levels.
- Import the UNSPSC hierarchy.
- Use category hierarchies set up by Tree Manager.
- Manage multiple hierarchies within a single catalog.

See Also

Chapter 4, “Setting Up PeopleSoft Catalog Management,” Creating Categories and Category Hierarchies, page 18

Define Transformations

Every partner’s content is different in format and structure, and every catalog requires its own format and structure based on its type. You can define transformations to translate each partner’s catalog content into the appropriate catalog format and structure. To simplify the source-to-target mapping effort, Catalog Management automates most data transformation setup and maintenance. Before defining catalog maps, you can:

- Set up target field default values.
- Define filtering rules to identify structured content that does not meet standard criteria.
- Standardize the domain of attribute values by replacing attribute values with equivalent predefined values.
- Perform calculations to derive additional attributes.
- Perform string manipulations.

See Also

Chapter 7, “Mapping, Transforming, and Loading Partner Source Data,” Understanding the Transformation and Loading Process, page 58

Defining Categorization

Organizing offerings into a category hierarchy enables users to quickly search and locate appropriate products and services. With Catalog Management, you can:

- Automatically categorize content based on offering names or partner categories.
- Assign an offering to one or more categories in a hierarchy.
- Match offerings from multiple partners into a common catalog offering, or create a separate catalog offering for each partner and offering combination.

See Also

Chapter 8, “Categorizing Offering Data,” page 65

Creating Versioning

Catalog Management maintains multiple versions of both partner catalogs and enterprise catalogs.

A new version of a partner catalog is created when the process to load partner offerings is run.

Content updates are applied to a staged copy of the unified catalog, and then moved to production, enabling review and verification of the content prior to syndication. When the process to move the catalog to production is run, a new catalog version is created by incrementing the version by one. As a result, changes can be made to the catalog without hindering day-to-day browsing, syndication, and purchasing needs.

Once a version is selected for production, all other versions are stored but not used again. The Remove Unused Versions feature provides a way for the catalog manager to remove these unused partner versions.

Archiving and Purging

Archiving catalog data allows catalog managers to manage the volumes of data maintained by Catalog Management by moving enterprise catalog data, that is no longer required, to history files. Removing this historical data from online tables prevents the database from increasing to an unmanageable size, and improves overall performance. The purge feature deletes previously archived data from the system. Once purged, the data cannot be restored.

Managing Security

With Catalog Management, both you and your partners use the same application for importing and managing structured content. The configurable security model built into Catalog Management enables you to:

- Create and manage users and roles using standard PeopleTools user administration.
- Assign user privileges to perform catalog administration functions, such as categorizing partner content, syndicating content, and moving a catalog to production.

Defining Roles

There are four significant roles in Catalog Management: the administrator, the taxonomist, the manager within the enterprise, and the catalog partner.

Enterprise Catalog Administrator

The enterprise catalog administrator has access to all catalog setup information and the ability to assign themselves as an enterprise catalog manager for all catalogs that he or she creates. This person creates catalogs and grants catalog access.

Note. Only enterprise catalog managers can gain access to catalog content.

Taxonomist

The taxonomist defines categories and category hierarchies.

Enterprise Catalog Manager

The enterprise catalog manager has access to catalogs to create and maintain data. This person manages data on behalf of a partner or for items provided directly by the enterprise. The catalog manager performs these activities:

- Catalog, partner, and partner offering maintenance.
- Importing, transforming, and loading data.
- Categorization.
- Staging.
- Moving catalogs to production.
- Rollback. (Return to a previous version of the production catalog.)
- Syndication.
- Browsing enterprise and partner offerings.
- Manually updating enterprise catalog offerings and partner offerings.

Catalog Partner

Catalog partners can access only their own catalogs. Access is determined by permissions assigned at the catalog level. The enterprise catalog manager and the catalog partner share the responsibility for catalog content maintenance. The catalog partner performs these activities:

- Partner offering maintenance.
- Importing, transforming, and loading data.
- Categorization.
- Staging.
- Browsing partner offerings.
- Manually updating partner offerings.

CHAPTER 3

Accessing PeopleSoft Catalog Management Functions

This chapter discusses how to navigate Catalog Management.

Navigating PeopleSoft Catalog Management

This section provides an overview of Catalog Management navigation.

Understanding PeopleSoft Catalog Management Navigation

Catalog Management provides multiple levels of navigation. Activities that do not require you to select an existing catalog are available from the application homepage. These activities are also available from the menu navigation.

You also use the homepage to select a specific enterprise catalog and access the Enterprise Catalog Console page, where you can perform activities such as moving the catalog to production, rolling back the catalog to another version, and syndicating the catalog. On this page, you can select a partner catalog to access the Partner Catalog Console page and manage data for the partner catalog. Enterprise and partner catalog activities are not available from the menu navigation; you can only access them from the Enterprise Catalog Console and Partner Catalog Console pages.

From the homepage or menu navigation, you can:

- Create and maintain catalogs.
- Create and maintain catalog partners.
- Specify file formats for catalog source data.
- Import partner data.
- Define workflow preferences.
- Create and maintain categories and category hierarchies.
- Load the United Nations Standard Products and Services Classification (UNSPSC) scheme or a PeopleSoft tree into a category hierarchy.
- Create and maintain category rules and substitutions.
- Select an enterprise catalog to work with.

From the Enterprise Catalog Console page, you can:

- Move a staged catalog to production.
- Roll back the production catalog to a previous version.

- Syndicate the catalog to partners.
- Browse the staged or production catalog.
- Define a master catalog map.
- Manually enter or change catalog data.
- Archive, purge, or restore catalog data.
- Select a partner catalog to work with.

From the Partner Catalog Console page, you can:

- Map partner catalog structure to the catalog structure.
- Load partner data.
- Categorize partner data and review and approve the results.
- Stage the partner catalog.
- Browse the partner catalog.
- Manually enter or change catalog data.
- Compare partner catalog versions.
- Remove unused partner catalog versions.

Important! If a user has not been granted privileges for certain activities using PeopleTools Security Administration, the links to those activities are not displayed.

Pages Used to Navigate PeopleSoft Catalog Management

Page Name	Object Name	Navigation	Usage
Catalog Management Home	EOCM_MAIN_PAGE	Catalog Management, Catalog Management Home	Create and maintain catalogs, partners, and categories. Select an enterprise catalog to work with.
Enterprise Catalog Console	EOCM_CATALOG_DASH	Catalog Management, Catalog Management Home Select an enterprise catalog.	Produce, roll back, syndicate, and browse the selected catalog. Update catalog data. Select a partner catalog to work with.
Partner Catalog Console	EOCM_PARTNER_DASH	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog.	Manage and view partner submissions to the selected enterprise catalog.

CHAPTER 4

Setting Up PeopleSoft Catalog Management

This chapter provides and overview of Catalog Management setup and discusses how to:

- Store attachment files.
- Define installation options.
- Define default workflow notifications.
- Create categories and category hierarchies.
- Register catalog partners.

Storing Attachment Files

This section provides an overview of the attachments and images feature and discusses how to store attachment files.

Understanding Attachments and Images Feature

The Attachments and Images feature allows you to capture, store, and utilize attributes related to an offering. These attributes can be the visual representation of an offering, the owner's manual in pdf form, or any type of file.

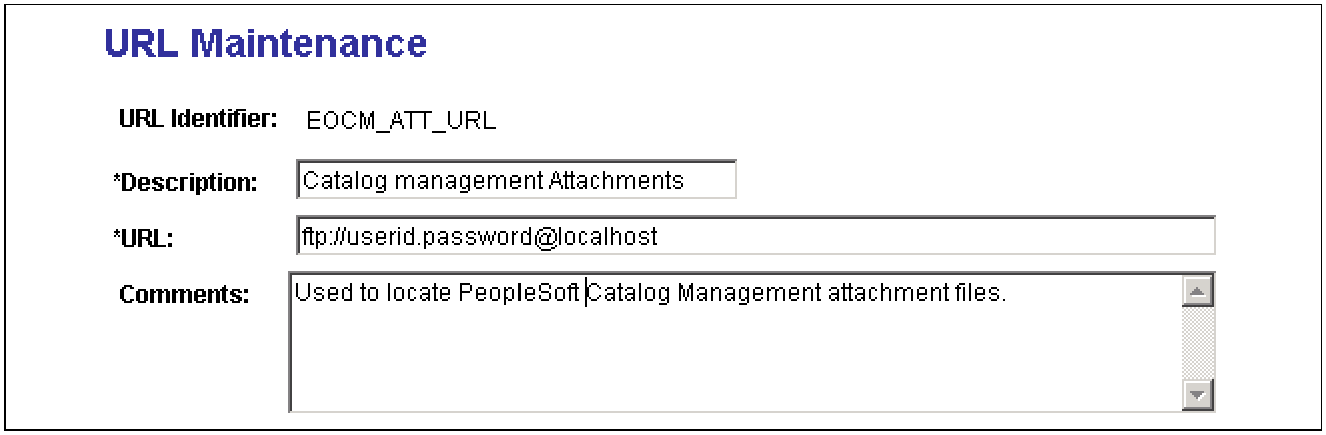
While browsing offerings within either a staged or production version of the catalog, the attachments and images feature allows users to:

- Link to the partner's website and view the offering's specifications at the source.
- View one or more attachment files that can be of any type, including a picture.

  The system allows multiple attachments to be associated to a single offering.

Storing Attachment Files

Go to PeopleTools, Utilities, Administration, URLS, to access the URL Maintenance page.



URL Maintenance page

Use this page to define the URL identifier for the file server where you are storing attachments. Catalog Management uses the URL Identifier named EOCM_ATT_URL.

Note. To launch the attachments from within Catalog Management, this URL identifier must be defined.

To define the Catalog Management URL identifier:

1. Define and share a common file server folder to store the attachments.

   In order to be accessed by the application servers, this folder must be shared.

2. Access the URL Maintenance page.

   Select the URL Identifier named EOCM_ATT_URL.

3. Enter the URL using the format ftp://userid:password@localhost.

4. Click Save.

Defining Installation Options

To define installation options, use the Installation Options (EOCM_INSTALLATION) component.

This section discusses how to:

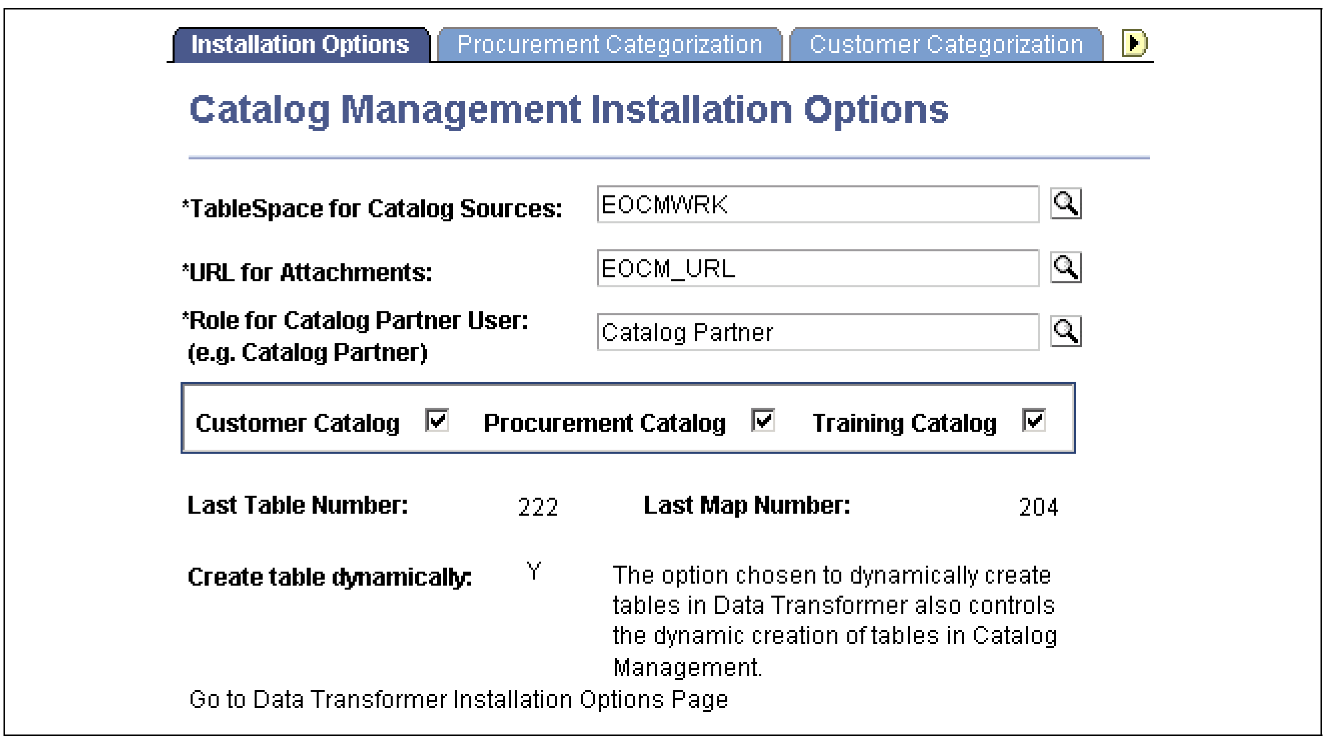
- Specify installation parameters.
- Select fields for categorization rules.

Pages Used to Define Installation Options

Page Name	Object Name	Navigation	Usage
Installation Options	EOCM_INSTALL_PAGE	Catalog Management, Define Installation Options	Specify installation parameters.
Procurement Categorization	EOCM_SETCAT_EPRO	Catalog Management, Define Installation Options, Procurement Categorization	Select fields for procurement categorization rules.
Customer Categorization	EOCM_SETCAT_CRM	Catalog Management, Define Installation Options, Customer Categorization	Select fields for customer categorization rules.
Training Categorization	EOCM_SETCAT_ELM	Catalog Management, Define Installation Options, Training Categorization	Select fields for training categorization rules.

Specifying Installation Parameters

Access the Installation Options page.



Installation Options page

TableSpace for Catalog Sources

Select where to store the temporary tables associated with the catalog source data.

This is used for all database platforms where tables must be stored in tablespaces.

URL for Attachments	Enter the URL that represents either the File Transfer Protocol (FTP) address or the database table used for storing the catalog source files, which are loaded as attachments. This URL is required to load source files.
Role for Catalog Partner User	Select the role to assign to partner users entered using the Maintain Catalog Partners component.
Procurement Catalog, Customer Catalog, and **Training Catalog**	Select the types of catalogs that you use. The types of catalogs selected here are the only types available when defining a new enterprise catalog.
Last Table Number	Displays the last sequential table number used for creating catalog sources. Tables are named using EOCM_TMPxxxxxx format. xxxxxx is replaced with the table number.
Last Map Number	Displays the last sequential map number used for creating catalog maps. Maps are named using CCM_xxxxxxxxx format. xxxxxxxxx is replaced with the map number.
Create table dynamically	The option chosen to dynamically create tables in Data Transformer also controls the dynamic creation of tables in Catalog Management.

See Also

Chapter 5, "Creating Enterprise Catalog Definitions," Defining General Catalog Information, page 29

Selecting Fields for Categorization Rules

Access the Procurement Categorization, Customer Categorization or Training Categorization page.

On each page, select the fields to use for matching partner offerings to your offerings. Categorization rules are based on the selected fields.

Defining Default Workflow Notifications

To define default workflow notifications, use the Catalog Notification (EOCM_DEFLT_NOTIFY) component.

This section provides an overview of notification details and discusses how to define default notifications.

Understanding Workflow Notifications

When managing catalogs, workflow notifications can be used to inform partners and managers of status changes and other relevant activities. Using workflow, automatic notifications can be sent to catalog managers when work needs to be reviewed or approved, or when a process, such as categorization or load, has finished. Email notifications can be triggered for these stages:

- Loaded.
- Categorized.

- Offering approved.
- Categories approved.
- Staged.
- Moved to production.
- Rolled back.
- Syndicated.

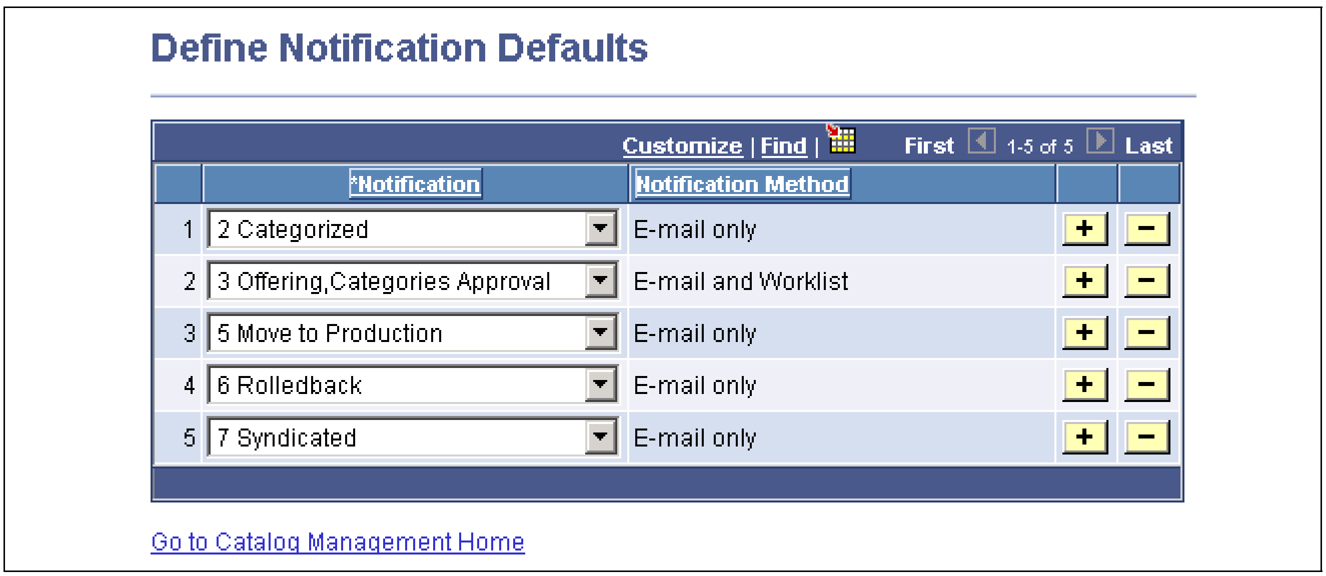
Note. Because completing the approval process requires action from the enterprise catalog manager, a worklist notification is also triggered for that process.

Pages Used to Define Default Workflow Notifications

Page Name	Object Name	Navigation	Usage
Define Notification Defaults	EOCM_DEFLT_NOTIFY	Catalog Management, Catalog Management Home Page, Define Notification Defaults	Specify the process stages when users should be notified.

Defining Default Notifications

Access the Define Notification Defaults page.



Define Notification Defaults page

Specify the different stages of the process when users should be notified. The notification method is displayed. The stages selected here can be changed for individual catalogs.

See Also

Appendix B, “Setting Security Options For Workflow,” page 111

Chapter 5, “Creating Enterprise Catalog Definitions,” Specifying Workflow Options, page 33

Creating Categories and Category Hierarchies

To create categories and category hierarchies, use the Category (EOCM_CATEGORY), Load Category Hierarchy (EOCM_LOAD_UNSPSC), and Category Hierarchy (EOCM_HIERARCHY) component.

This section provides an overview of categories and category hierarchies and discusses how to:

- Create categories.
- Create category hierarchies.
- Load hierarchies.

Understanding Categories and Category Hierarchies

You use categories to assemble similar offerings into groups. With categories, similar offerings are members of a class, similar classes are members a more general class, or family, and so on. The relationship among offerings and the relationship of an offering to its class are necessary for effectively searching and finding appropriate products and services.

A hierarchy organizes available offerings into parent and child relationships.

With Catalog Management, you can either create categories and category hierarchies, use the UNSPSC, or use PeopleSoft trees.

The UNSPSC system is an open, global electronic commerce standard that provides a logical framework for classifying products and services. The UNSPSC is a hierarchal classification with five levels. The levels allow users to search products more precisely, because searches are confined to logical categories.

For example, the commodity Pen Refills is part of a larger class of products, Ink and Lead Refills, which in turn is part of a family of products, Office Supplies, which is itself part of a segment of products, Office Equipment, Accessories, and Supplies. Each level of the hierarchy has its own unique number.

Pages Used to Create Categories and Category Hierarchies

Page Name	Object Name	Navigation	Usage
Maintain Categories	EOCM_CATEGORY	Catalog Management, Categories, Maintain Categories	Create and maintain categories (groupings of offerings) that are used within category hierarchies.
Maintain Category Hierarchies	EOCM_CAT_HIER	Catalog Management, Categories, Maintain Category Hierarchies	Create and maintain hierarchical structures for displaying catalog offerings.
Load Hierarchy	EOCM_LOAD_UNSPSC	Catalog Management, Categories, Load Hierarchy	Load the UNSPSC classification scheme or a PeopleSoft tree into a category hierarchy.

Creating Categories

Access the Maintain Categories page.

Category Name Enter a name to describe the group of offerings.

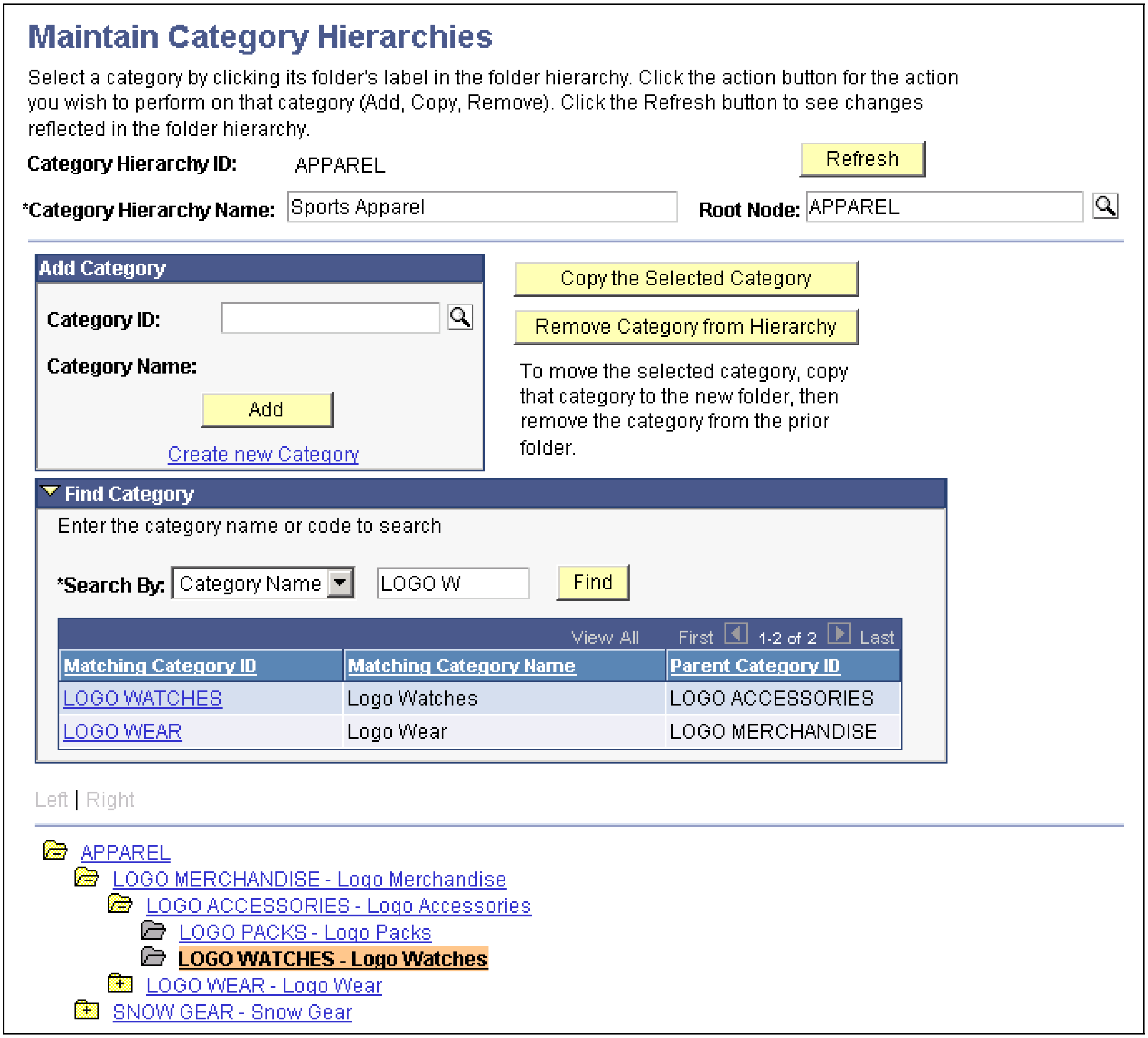
Comments Enter a more detailed description.

Category Code (Options) Enter a code for this category.

This field is used when downloading the UNSPSC classification scheme into a category hierarchy.

Creating Category Hierarchies

Access the Maintain Category Hierarchies page.



Maintain Category Hierarchies page

Create and maintain hierarchical structures to display catalog offerings. Category hierarchies have their own IDs, so they can be used across multiple catalogs.

Category Hierarchy Name Enter a unique name to describe this hierarchy.

Refresh

Click to refresh the hierarchy tree after returning from the Copy Category page.

The hierarchy tree is resorted alphabetically within a branch and reflects all changes.

Add Category

To add an existing category to the hierarchy:

1. Select the parent category in the hierarchy tree
2. Select a category.
3. Click Add.

   The category appears in the tree as the child of the selected parent category.

To add a new category:

1. Select the parent category in the hierarchy tree.
2. Click the Create New Category link to display the Maintain Categories page.
3. Enter the new category ID, name, and comments. Click OK.

   The new category ID and name appear in the Add Category section.
4. Click Add.

   The category appears as the child of the selected parent category.

Copy the Selected Category

To copy a category to another location in the hierarchy:

1. Select the category to copy, and click Copy the Selected Category to display the Select Category page.
2. Highlight the category that you want as the parent of the copied category, and click OK.

   The selected category is copied to its new parent. If children exist, they are also copied.

Remove Category From Hierarchy

Select the category to remove, and click Remove Category From Hierarchy.

The category is not removed if:

- Offerings are present.
- Children exist.

Note. To move a category, first copy the category to the new parent, then remove the original category.

Find Category Feature

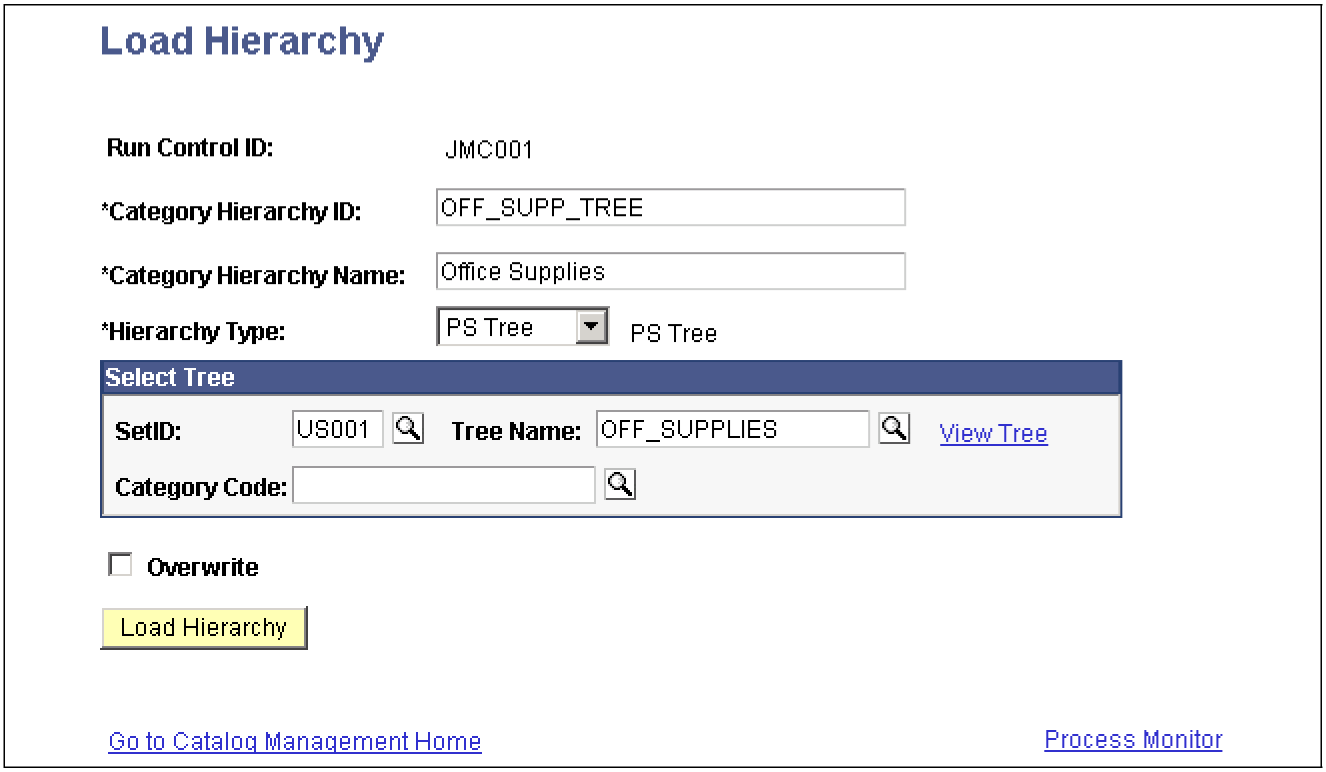
The Find Category feature allows you to easily search for a category in any hierarchy. The system will automatically expand the hierarchy from the root to the category being searched. This is useful in cases where there are several levels of categories, or where a category is present in multiple paths.

You can search categories by code or by name. For name searches a partial name can be entered, and a list of all categories that match the search criteria are returned. If a category matching the search criteria is present in multiple paths all paths are returned. Click the category ID of the desired category. The category hierarchy will expand and the selected category will be highlighted in the hierarchy.

Note. By default, the group box is collapsed when you first access the page.

Loading Hierarchies

Access the Load Hierarchy page.



Load Hierarchy page

Hierarchy Type

Select *PS Tree* or *UNSPSC.*

Note. If you choose *UNSPSC,* you need to download the file from the UNSPSC homepage and save it as a text (tab-delimited) file. If you choose PS Tree the fields in the Select Tree group box become active.

SetID and **Tree Name**

Select a SetID and Tree Name to choose a PeopleSoft tree. Click the View Tree link to open a new browser window and view the selected tree in Tree Manager's View Tree component.

Category Code

Select a field from the Tree Manager node record, which you want to use to populate the category code field in Catalog Management. If no node record field qualifies as a category code leave this field blank.

Note. The Lookup is dynamically populated based on the tree you select.

Overwrite

Select if the hierarchy already exists and you want to replace it. Clear for the hierarchy to be assumed unique and added.

Load Hierarchy

Click to run the application engine EOCM_UNSPSC process.

Note. be prompted to locate and select the file on the computer. When selected, the navigation path appears. Click the Upload button to process the request.

The process is submitted. Click the Process Monitor link to monitor the status requests. When the process has completed successfully, the categories and hierarchy are available in Catalog Management.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler.

Registering Catalog Partners

To register catalog partners, use the Maintain Catalog Partners (EOTP_QUICKPARTNER) component.

This section provides an overview of catalog partner registration and discusses how to:

- Add new partner information.
- Add partner address information.

Understanding Catalog Partner Registration

As part of defining a catalog, you specify which partners provide or view catalog content, and you grant specific security authorization to individual partner users. Before you can do this, the partners must be registered and approved in Maintain Catalog Partners.

The basic steps to complete partner registration are:

1. Create required Catalog Management services.

   Services are created automatically within Maintain Catalog Partners if they do not exist for the process and Set ID combinations selected when a partner is created through Catalog Management.

2. Register the partner.
3. Approve the registration and notify the partner.

   Partners registered using the Maintain Catalog Partners component are automatically approved.

4. Associate users with the registered partner.

You use the Maintain Catalog Partners component to register partners for Catalog Management. Once the registration is complete, you can manually send the partner an email acknowledging approval, along with the URL, user ID and password required to access the PeopleSoft system. The partner can then add individual users who are responsible for either performing catalog management tasks and activities or just viewing the catalog.

Note. Partners who require registration approval for services outside of Catalog Management must be registered using the Maintain Catalog Partners system.

When defining a new enterprise catalog, privileges are granted to individual partner users for performing specific tasks and activities.

See Also

Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Partners and Granting Privileges, page 31

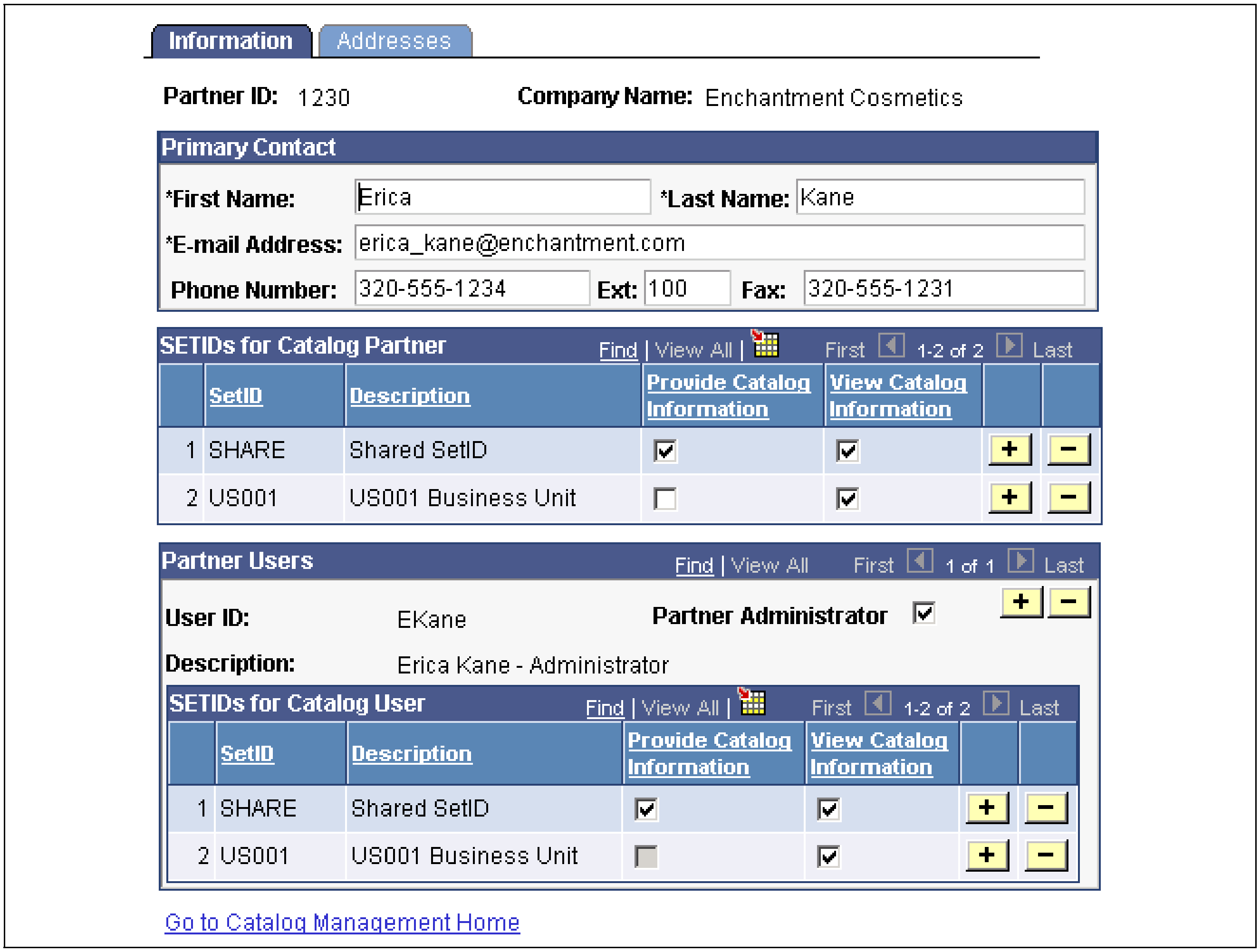
Appendix C, "Setting Automatic Daily Partner Cleanup," page 115

Pages Used to Maintain Catalog Partners

Page Name	Object Name	Navigation	Usage
Maintain Catalog Partners - Information	EOTP_CATPARTNER	Catalog Management, Maintain Catalog Partners	Create and maintain catalog partners and partner users, and grant access privileges.
Maintain Catalog Partners - Addresses	EOTP_PRT_ADDR2,	Catalog Management, Maintain Catalog Partners, Addresses	Enter a partner's company address and alternate address information. Update a partner's address information, then click the Save button.

Adding New Partner Information

Access the Maintain Catalog Partners - Information page.



Maintain Catalog Partners - Information page

Note. To create partner user profiles, the Partner ID user profile type must be enabled.

SETIDS for Catalog Partner

Define the setIDs that each partner can access. You must select at least one setID. If catalog services do not exist in the system for the selected setID, the system automatically creates them and assigns them to the partner as requested.

Provide Catalog Information	Select if any users associated with this setID are responsible for performing catalog management tasks and activities.
View Catalog Information	Select if any users associated with this setID have access to view catalogs only.

Partner Users

Enter information for each individual user associated with the partner. Only setIDs assigned to the partner can be assigned to the partner user.

User ID	Enter a unique ID for the user to access the Catalog Management system
Description	Enter up to a 30-character description, such as the user's name

Operator Password (Encrypted) and **Confirm Password**

Enter and confirm a password for the user to access Catalog Management.

Partner Administrator

Select if this user is an administrator.

Note. Partner administrators have access to this page to add new partner users and revoke or assign catalog services to existing partner users.

SETIDs for Catalog User

Define the setIDs and access privileges for each partner user. All partner users are assigned the role defined with the Define Installation Options component.

If the partner is granted access to only view catalog information, the Provide Catalog Information option is not available on the partner users grid.

Note. The catalog partner role must be defined on the Installation Options page before partner user profiles can be created.

Saving Partner Information

Once saved:

- The partner is automatically registered with Partner status.
- Services associated with the partner are automatically assigned and approved.
- Partner user profile attributes can only be changed through PeopleTools security.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleTools Security.

Adding Partner Address Information

Access the Maintain Catalog Partners - Addresses page.

Note. Address fields shown on the page are specific to the chosen country.

Corporate Address and **Alternate Address**

Corporate Address is automatically selected when you first open this page. If you select to add a second address, Alternate Address is automatically selected.

Note. Only two addresses can be added for a single partner.

Address fields

Displays the company’s address once it has been entered.

CHAPTER 5

Creating Enterprise Catalog Definitions

This chapter discusses how to create new enterprise catalogs.

Note. This activity is performed by the enterprise catalog administrator.

Defining New Enterprise Catalogs

To define enterprise catalogs, use the Maintain Catalogs (EOCM_CATALOG) component.

This section discusses how to:

- Define general catalog information.
- Assign enterprise managers and grant privileges.
- Assign partners and grant privileges.
- Associate category hierarchies.
- Specify workflow options.

Common Elements Used in This Chapter

Categorize Select to grant privileges to categorize partner offerings and review results.

Define Map Select to grant privileges to map partner source attributes to the enterprise catalog's attributes.

Load Data Select to grant privileges to transform source data to the enterprise catalog format.

Notify Select to receive workflow notifications based on the workflow options set for this catalog and the user's privileges.

Stage Select to grant privileges to move a partner's input to staging.

Staging indicates that a partner's input to the catalog is ready for inclusion in the enterprise catalog.

See Also

Chapter 8, "Categorizing Offering Data," page 65

Chapter 7, "Mapping, Transforming, and Loading Partner Source Data," Defining Catalog Maps, page 51

Chapter 7, "Mapping, Transforming, and Loading Partner Source Data," Transforming and Loading Data, page 58

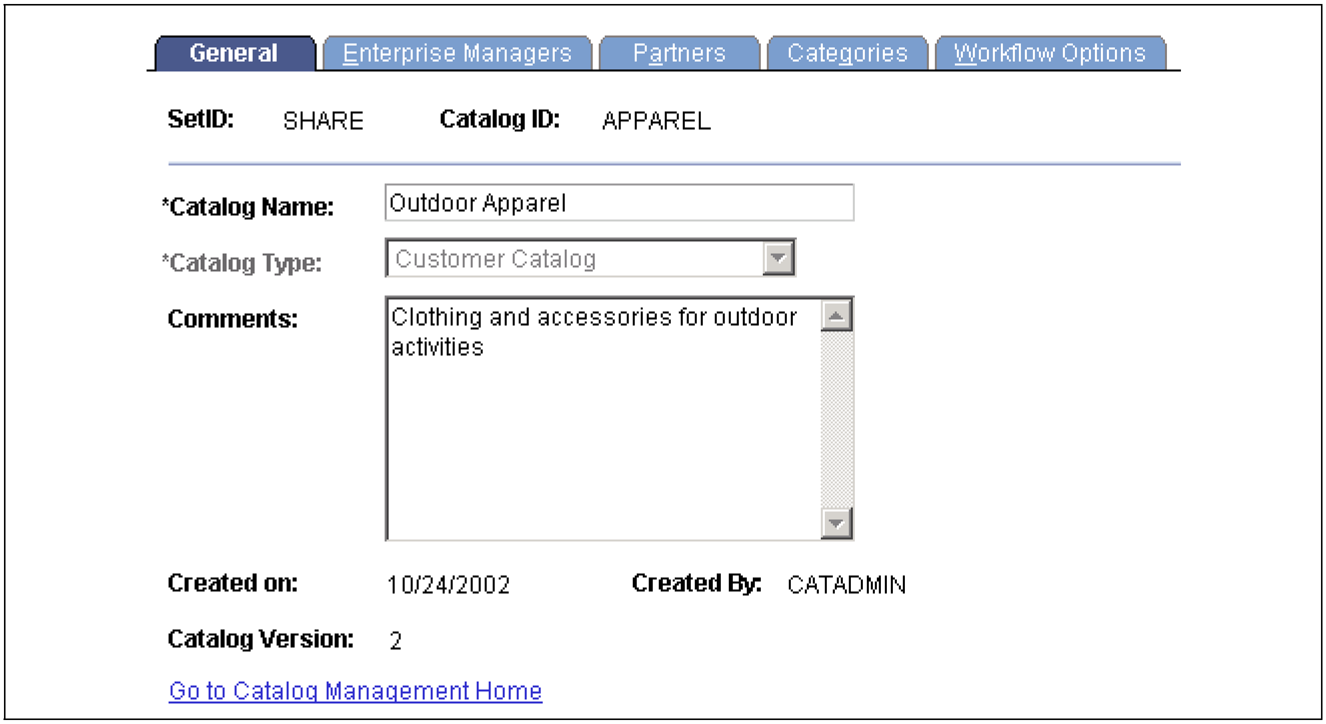
Chapter 9, "Staging and Browsing Partner Offerings," Staging Partner Offerings, page 83

Pages Used to Define New Enterprise Catalogs

Page Name	Object Name	Navigation	Usage
General	EOCM_CATALOG_MAIN	Catalog Management, Catalog Management Home Page, Maintain Catalogs, General Catalog Management, Catalogs, Maintain Catalogs, General	Enter general catalog information, including name and catalog type.
Enterprise Managers	EOCM_CATALOG_MAN	Catalog Management, Catalog Management Home Page, Maintain Catalogs, General, Enterprise Managers Catalog Management, Catalogs, Maintain Catalogs, General, Enterprise Managers	Assign enterprise managers and grant privileges.
Partners	EOCM_CATALOG_TP2	Catalog Management, Catalog Management Home Page, Maintain Catalogs, General, Partners Catalog Management, Catalogs, Maintain Catalogs, General, Partners	Assign partners and grant privileges.
Categories	EOCM_CATALOG_CAT	Catalog Management, Catalog Management Home Page, Maintain Catalogs, General, Categories Catalog Management, Catalogs, Maintain Catalogs, General, Categories	Associate category hierarchies.
Workflow Options	EOCM_CATALOG_WORKF	Catalog Management, Catalog Management Home Page, Maintain Catalogs, General, Workflow Options Catalog Management, Catalogs, Maintain Catalogs, General, Workflow Options	Specify the Catalog Management process stages to notify enterprise managers and partners.

Defining General Catalog Information

Access the Maintain Catalogs - General page.



Maintain Catalogs - General page

Catalog Type Select from *Training, Procurement,* or *Customer.*

Note. The catalog types listed are based on selected installation options.

Catalog Version Displays the latest working catalog version.

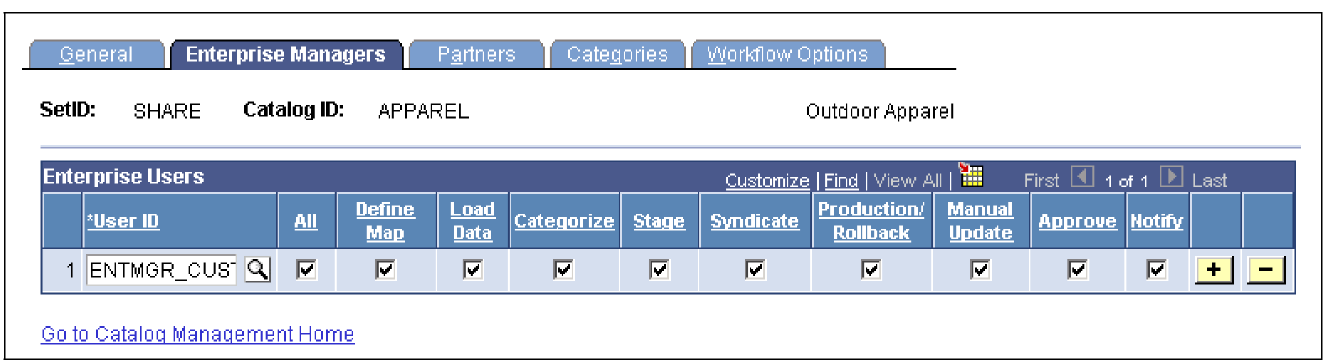
Note. For a new enterprise catalog, the version is *1.* When the catalog is successfully moved to production, the version number for the working catalog is incremented by one.

See Also

Chapter 4, "Setting Up PeopleSoft Catalog Management," Defining Installation Options, page 14

Assigning Enterprise Managers and Granting Privileges

Access the Maintain Catalogs - Enterprise Managers page.



Maintain Catalogs - Enterprise Managers page

User ID Select the enterprise managers assigned to this catalog.

All Select to grant privileges for all activities. Clear to select activities individually.

Note. When All is selected, the system automatically selects all activities except Notify. Select Notify manually if the enterprise manager wants to be notified at the completion of certain processes for which he or she has authorization.

Syndicate Select to grant privileges to syndicate the production catalog.

Syndication is the distribution of the approved production catalog to partners.

Production/Rollback Select to grant privileges to move the staged version of the enterprise catalog to production, or to roll back a production version of the enterprise catalog to a previous version.

Manual Update Select to grant privileges to manually enter and change data about partner offerings and enterprise catalog data.

Approve Select to grant privileges to approve or reject proposed categories and catalog offerings that result from the Categorize Partner Offerings process. A worklist is automatically created for this user.

Note. All enterprise catalog managers are automatically granted browsing privileges to the enterprise catalog and all partner catalogs, both in staged and production status.

Users must also be assigned with the appropriate roles using PeopleTools Security or the they will not have access, despite the selections made here.

See Also

Chapter 2, “Understanding PeopleSoft Catalog Management,” Defining Roles, page 9

Chapter 10, “Producing and Syndicating Enterprise Catalogs,” Syndicating Catalogs, page 93

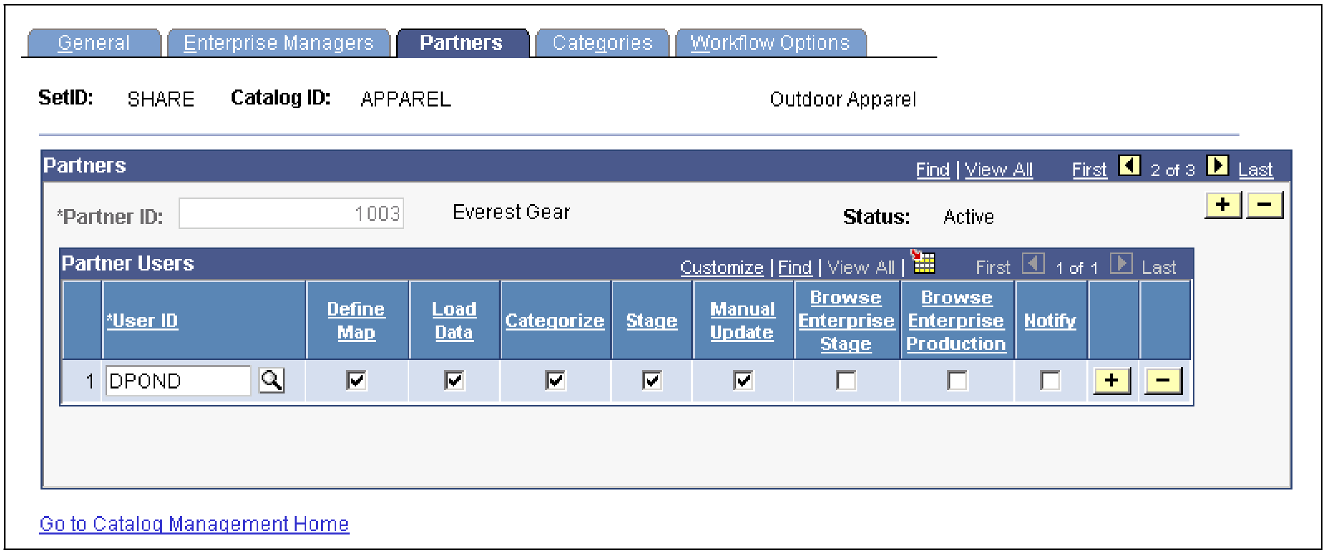
Chapter 10, “Producing and Syndicating Enterprise Catalogs,” Moving Catalogs to Production, page 89

Chapter 11, “Maintaining Enterprise Catalog and Partner Offerings,” page 99

Chapter 8, “Categorizing Offering Data,” Approving Categorization Results, page 80

Assigning Partners and Granting Privileges

Access the Maintain Catalogs - Partners page.



Maintain Catalogs - Partners page

Partner ID

Select the partners assigned to this catalog who will be providing catalog content, viewing catalog content, or both.

Note. You can only select partners that are registered and have approval for either Provide Catalog Information or View Catalog Information Catalog Management service processes.

Status

Displays the current status of the selected partner, *Active* or *Inactive.*

Partners become active when they have registered and have been approved for at least one Catalog Management service process. Their status becomes inactive if they terminate their registration using Maintain Catalog Partners.

User ID

Select partner users.

Note. You can only select users that are associated with the selected partner in the Common Registration component.

Manual Update

Select to grant privileges to manually enter and change data about partner offerings.

Browse Stage and **Browse Production**

For staging and production catalogs, select to grant privileges to:

- Browse the enterprise catalog by offering.
- Browse the enterprise catalog by hierarchy.

Note. If a partner is granted privileges to browse enterprise catalogs, data supplied by all partners is accessible. Privileges to browse at the partner catalog level are automatically granted.

See Also

Chapter 4, “Setting Up PeopleSoft Catalog Management,” Registering Catalog Partners, page 22

Chapter 11, “Maintaining Enterprise Catalog and Partner Offerings,” Maintaining Partner Data, page 101

Chapter 9, “Staging and Browsing Partner Offerings,” Browsing Staged Offerings, page 84

Chapter 10, “Producing and Syndicating Enterprise Catalogs,” Browsing Production Offerings, page 90

Associating Category Hierarchies

Access the Maintain Catalogs - Categories page.

Maintain Catalogs - Categories page

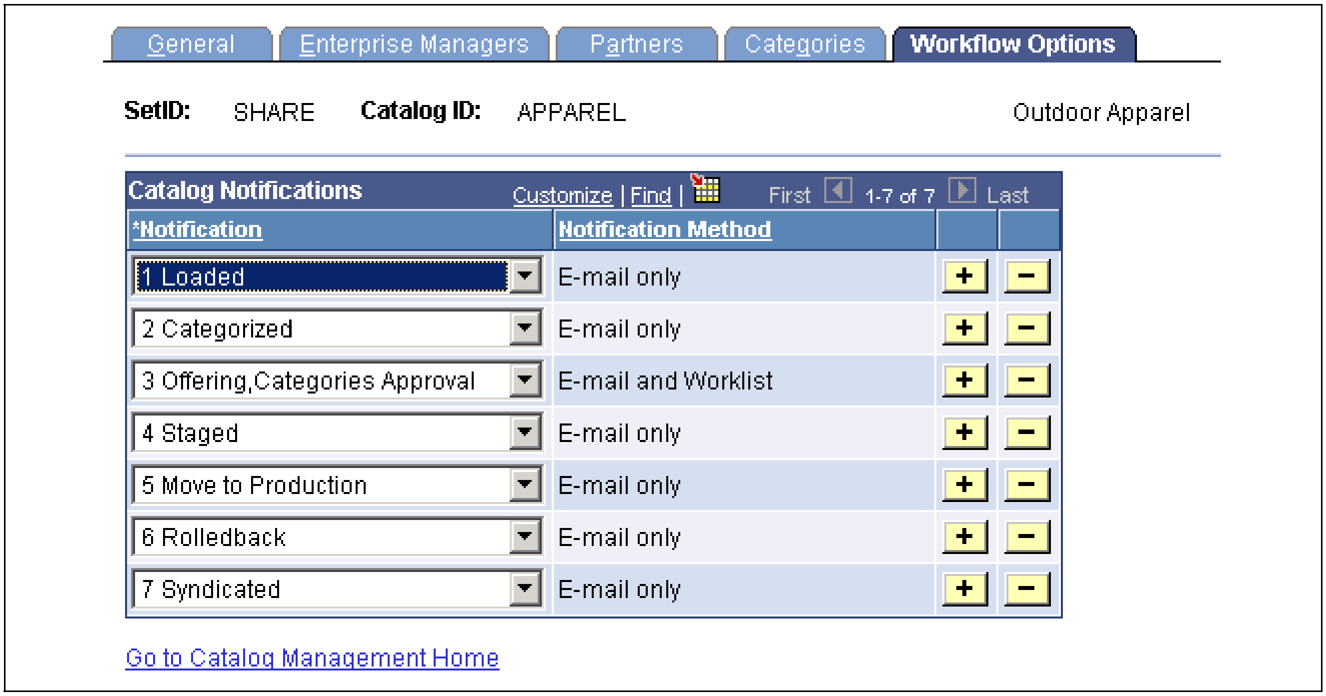
Category Hierarchy ID	Select category hierarchies for this catalog.
View	Click to view the selected hierarchy in a new browser window.

See Also

Chapter 4, “Setting Up PeopleSoft Catalog Management,” Creating Categories and Category Hierarchies, page 18

Specifying Workflow Options

Access the Maintain Catalogs - Workflow Options page.



Maintain Catalogs - Workflow Options page.

Notification Select the stages of the process to notify users. The method of notification is displayed for each stage that you select. Default notification choices are already selected.

See Also

Chapter 4, "Setting Up PeopleSoft Catalog Management," Defining Default Workflow Notifications, page 16

CHAPTER 6

Importing Partner Source Files

This chapter provides and overview of the catalog source layouts discusses how to:

- Define catalog source layouts.
- Define master catalog source layouts.
- Import source data.

Defining Catalog Source Layouts

To define the sources for catalog data use the Define Data Source (EOCM_REG_DATA_SRC) component.

This section discusses how to:

- Define the file format.
- Specify the file fields.

You can use sample files to assist you when defining the layout.

This step need only be performed once as long as the format of the partner's source files do not change. This step can be performed by either the partner or an enterprise catalog manager.

Note. Functionality to define shared master catalog sources and allow partners to define their own data sources exists.

Understanding Data Source Types

Catalog Management supports:

- Flat files
- xCBL
- CIF (Catalog Interchange Format) – Industry standard CSV file format from Ariba.
- CUP (Catalog Update Process) – Microsoft Access Database file from CommerceOne.

Catalog Interchange Format (CIF)

The field names on the Source Fields page of the catalog source will be defined based on the field names defined in the header section of the CIF file. If the field names have not been defined, Catalog Management will use the fields listed below:

Important! An error message will display when you attempt to upload a CIF file that does not have a .cif extension, CIF_I_V3.0 as the first row in the data file, contains less than 12 columns of data.

Field Name	Field Type
Supplier ID	Character
Supplier Part ID	Character
Manufacturer Part ID	Character
Item Description	Character
SPSC Code	Character
Unit Price	Number with Decimal
Unit of Measure	Character
Lead Time	Number without Decimal
Manufacturer Name	Character
Supplier URL	Character
Manufacturer URL	Character
Market Price	Number with Decimal
Additional fields will be automatically created and named sequentially, starting with FIELD1, FIELD2, and so on.	Character

Catalog Update Process (CUP)

The CUP format is only supported if eProcurement is installed. eProcurement users will be required to use the ePro visual basic executable to export the CommerceOne Microsoft Access Database file to a flat file. The fields exported are predefined and positioned in the same order as the list below.

Note. You must export the Microsoft Access Database Products file, which contains both product and price information.

The field names are automatically created on the Source Fields page of the catalog source, and are disabled to prevent users from making changes.

Field Name	Field Type	Length
CUP_PartUpdateID	Number	10
CreateDate	Date	10
ActionCode	Character	5

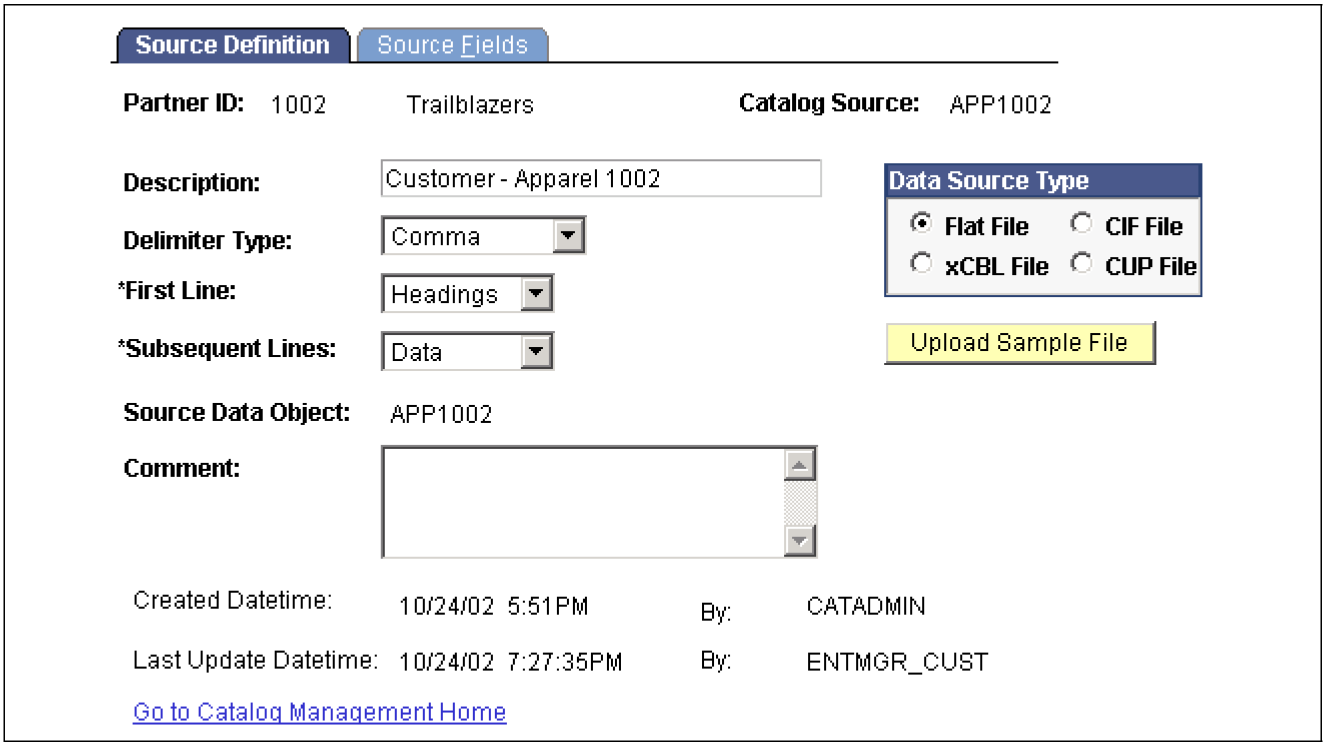
Field Name	Field Type	Length
Cup_SupplierPartnerID	Number	5
TPID	Character	50
TPName	Character	100
PartNum	Character	50
PartNumExt	Character	50
UOM	Character	12
UnitPrice	Number	10.5
MfrPartNum	Character	50
MfrName	Character	50
CatLevel1	Character	120
CatLevel2	Character	120
CatLevel3	Character	120
CatLevel4	Character	120
AcctLevel1	Character	2
AcctLevel2	Character	2
AcctLevel3	Character	2
AcctLevel4	Character	2
LeadTime	Number	11
CurrencyCode	Character	3
EffectiveDate	Date	10
QtyMin	Number	11
ShortDesc	Character	254
LongDesc	Character	254

Pages Used to Define Catalog Source Layout

Page Name	Object Name	Navigation	Usage
Maintain Catalog Sources	EOCM_SOURCE_PAGE	Catalog Management, Catalog Management Home, Maintain Catalog Source Catalog Management, Catalogs, Maintain Catalog Sources	Choose to define either a catalog source or a master catalog source.
Define Catalog Source - Source Definition	EOCM_DATA_SRC_1	Catalog Management, Catalog Management Home Page, Maintain Catalog Source Select the Define Catalog Source link located on the Maintain Catalog Source page. Catalog Management, Catalogs, Maintain Catalog Sources Select the Define Catalog Source link located on the Maintain Catalog Source page.	Specify the file format to use to import the partner source catalog data.
Define Catalog Source - Source Fields	EOCM_DATA_SRC_2	Catalog Management, Catalog Management Home Page, Maintain Catalog Source, Define Catalog Source, Source Definition, Source Fields Catalog Management, Catalogs, Maintain Catalog Sources, Define Catalog Source, Source Definition, Source Fields	Specify the fields contained in the source file. Identify character qualifiers for particular fields and characters that should be stripped from the data.

Defining the File Format

Access the Maintain Catalog Sources - Source Definition page.



Maintain Catalog Sources - Source Definition page

Partner ID and **Catalog Source**

These two values combined form a unique ID for the catalog source file.

Delimiter Type

Select the delimiter type used to separate each field value in this file. Choose from *Comma, Semi Colon, Space, Tab, Fixed Length, Other.* If *Other* is selected, a new field appears for you to enter the delimiter value, such as: % or $.

If *Fixed Length* is selected, the Upload Sample File button is hidden, and the user must manually define the fields on the Maintain Catalog Sources - Source Fields page.

Note. You can select a value for flat files only. The field is disabled with the value *Comma* preselected for CIF and CUP files. The field is not visible for xCBL files.

First Line

Specify if the first line of the file contains headings or data.

If you select *Headings,* the values located in the first line of the uploaded sample file become the field names. If you select *Data,* the field names need to be added manually on the Maintain Catalog Sources - Source Fields page.

Note. You can select a value for flat files only. The field is disabled with the value *Headings* preselected for CIF files and *Data* preselected for CUP files. The field is not visible for xCBL files.

Subsequent Lines

Specify if subsequent lines of the file contain data or nothing.

Data is used for determining the field type and length from the sample file.

Note. You can select a value for flat files only. The field is disabled with the value *Data* preselected for CIF and CUP files. The field is not visible for xCBL files.

Source Data Object

Enter a unique name, up to 30 characters. For example, use the partner ID and catalog source, such as 1001_OFFICESUPPLIES.

This field creates a source data object for Data Transformer and is used as a source for the catalog map definition.

Flat File, xCBL, CIF, or **CUP**

Select the file type.

By

Displays the user ID of the person who created or updated this catalog source.

Created Date Time and **Last Update DateTime**

Displays the date and time that this catalog source was created and updated.

Upload Sample File

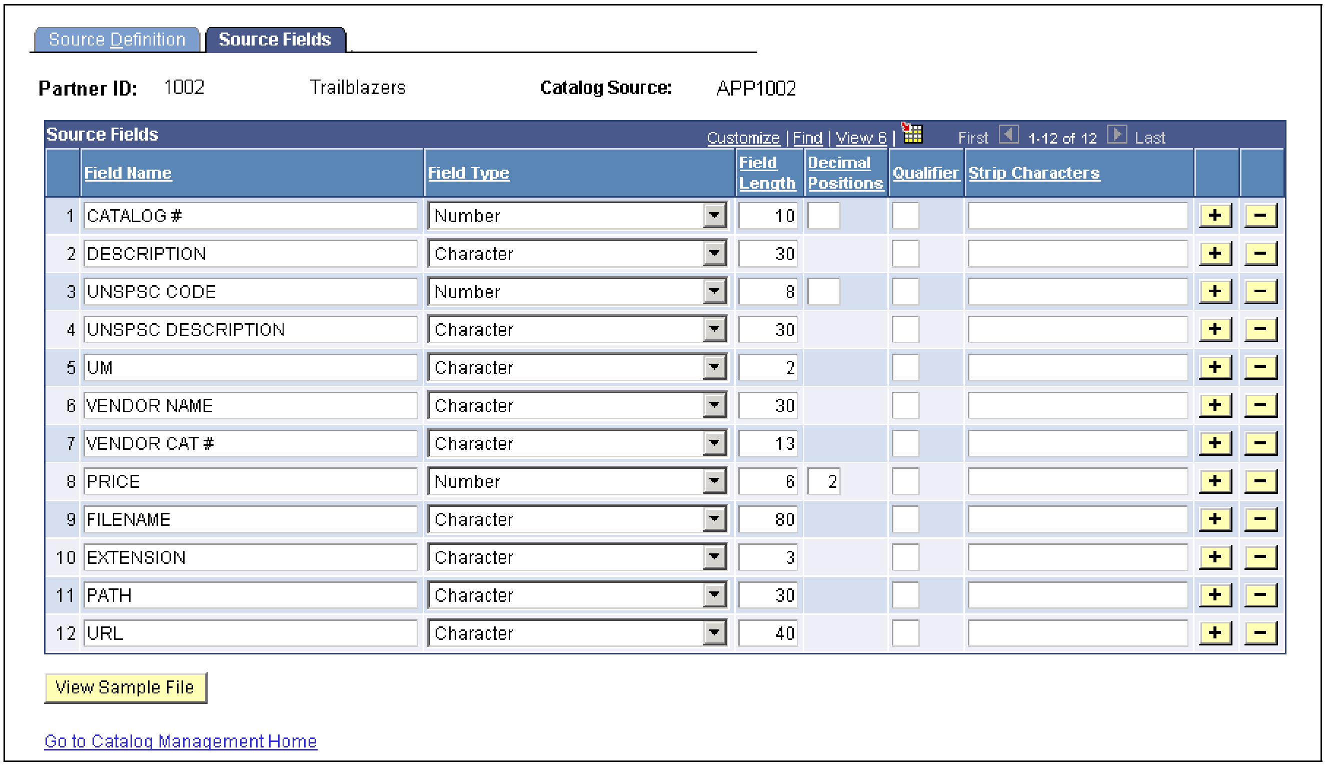
Click to upload a sample file. A page appears to enter the navigation path to the location of the sample file. Click Upload.

The system reads the file and determines the format of the fields. When complete, the Maintain Catalog Sources - Source Fields page is displayed with the source field definitions.

Alternatively, navigate to the Maintain Catalog Sources - Source Fields page and add rows to reflect the structure of the file.

Specifying File Fields

Access the Maintain Catalog Sources - Source Fields page.



Source Definition | **Source Fields**

Partner ID: 1002 Trailblazers **Catalog Source:** APP1002

Source Fields Customize | Find | View 6 | First 1-12 of 12 Last

	Field Name	Field Type	Field Length	Decimal Positions	Qualifier	Strip Characters		
1	CATALOG #	Number	10				+	−
2	DESCRIPTION	Character	30				+	−
3	UNSPSC CODE	Number	8				+	−
4	UNSPSC DESCRIPTION	Character	30				+	−
5	UM	Character	2				+	−
6	VENDOR NAME	Character	30				+	−
7	VENDOR CAT #	Character	13				+	−
8	PRICE	Number	6	2			+	−
9	FILENAME	Character	80				+	−
10	EXTENSION	Character	3				+	−
11	PATH	Character	30				+	−
12	URL	Character	40				+	−

View Sample File

Go to Catalog Management Home

Maintain Catalog Sources - Source Fields page

Note. Source field information is automatically completed when the sample source file is uploaded. However, the information can be changed or entered manually.

Field Name

Enter the field name for each column of data.

This information is extracted from the first line of the sample file, if you indicated that the file contains headings.

Note. This field is read-only for xCBL files.

Field Type

Select the field type for each column of data. Choose from *Character, Date, DateTime, Number, Signed Number,* and *Time.*

Field Length and **Decimal Positions**

Enter the field length for each column of data. For number fields, include decimal positions.

Qualifier

Specify a character as a qualifier for a field.

For example, if the format of the file is comma-separated value (CSV), and the item description field contains data with embedded commas, it can be qualified by enclosing the data in quotes. In this case the “ character is the qualifier. When the data is imported, the item description is imported with the embedded commas.

Strip Characters

Specify characters to strip from a field.

For example, if a price field has data starting with a $ sign, the user specifies the $ character in this field. During the import process, the $ character is stripped from the price data. The user can specify multiple characters for each data field.

View Sample File

Select to view the sample file.

A new browser window opens with the content of the file.

Note. This button is hidden if the delimiter type is *fixed length.*

Attachments and Images

To utilize all the benefits of the attachments and images feature, you will need to define a catalog source layout with the addition of four new fields that must be mapped these enterprise catalog fields:

- File Name.
- File Extension. (Image extensions can be BMP, RLE, GIF, JPEG, JPG, TIF, or PCX).
- File Path.
- URL. (Required if you are creating a link to the partner's website).

The new fields in the partner source data file will contain the name of the attachment files, their extension names, and the path to their location.

CATALOG#	DESCRIPTION	UNSPSC CODE	UNSPSC DESCF	UM	VENDOR NAME	VENDOR CAT #	PRICE	Filename	Extension	Path	URL
300101	Tri Bike	42281000	Tricycles	EA	TOYS & BIKES	1815A	100.99	tricycle	JPG	attach/	http://www.onewheels.com
300101	Tri Bike	42281000	Tricycles	PR	TOYS & BIKES	1815A	200	tricycle	JPG	attach/	http://www.onewheels.com
200345	Child Bike	41121203	Bicycles	EA	TOYSR4U	430766	249.99	childbike	JPG	attach/	http://www.onewheels.com
200345	Child Bike	41121203	Bicycles	PR	ADVENTURES II	22 36 320 4	345.49	childbike	JPG	attach/	http://www.onewheels.com
100420	Mountain Bike	41121203	Bicycles	EA	ADVENTURES II	22 36 361 1	234.98	mtnbike	JPG	attach/	http://www.onewheels.com
100203	Mountain Bike	41122400	Road and Mount	EQ	RACERS	HX15997	523.5	mtnbike	JPG	attach/	http://www.onewheels.com
100336	Mountain Bike	41122400	Road and Mount	EA	DRAKES BIKES	5954	255	mtnbike	JPG	attach/	http://www.onewheels.com
100336	Mountain Bike	41122400	Road and Mount	PR	DRAKES BIKES	6212	322.75	mtnbike	JPG	attach/	http://www.onewheels.com
100190	Mountain Bike	41121203	Bicycles	EA	FAST WHEELS	1000 1L	234.98	mtnbike	JPG	attach/	http://www.onewheels.com
100650	Mountain Bike	41121203	Bicycles	PR	GO4IT	14000 100	543.55	mtnbike	JPG	attach/	http://www.onewheels.com

Sample partner source data file

To avoid duplicate entries, the system assigns the Vendor Item ID and UOM fields as pseudo key fields. To allow for the association of multiple attachments to a single offering, the system also assigns the field File Name as a pseudo key field.

When the catalog source layout is defined, import the partner source data file. No changes have been made to the import process. Once imported, the data is available to be transformed and loaded into the enterprise catalog.

Defining Master Catalog Source Layouts

This section provides an overview of master data source and map concepts and discusses how to define master catalog sources.

Understanding Master Catalog Source and Map Concepts

Using one master catalog source layout and one related master catalog map for multiple partners allows customers to standardize the format partners must use to transmit catalog offerings. In turn, a standardized format prevents customers from having to create and maintain several sources and map definitions, which can be very time-consuming and costly.

A master catalog source and related master map will provide the ability to:

- Share a master catalog source definition among multiple partners across catalogs.

- Share a master source data object with multiple partners.
- Share a master map definition.
- Use a unique catalog source and master map, for one or multiple partners.

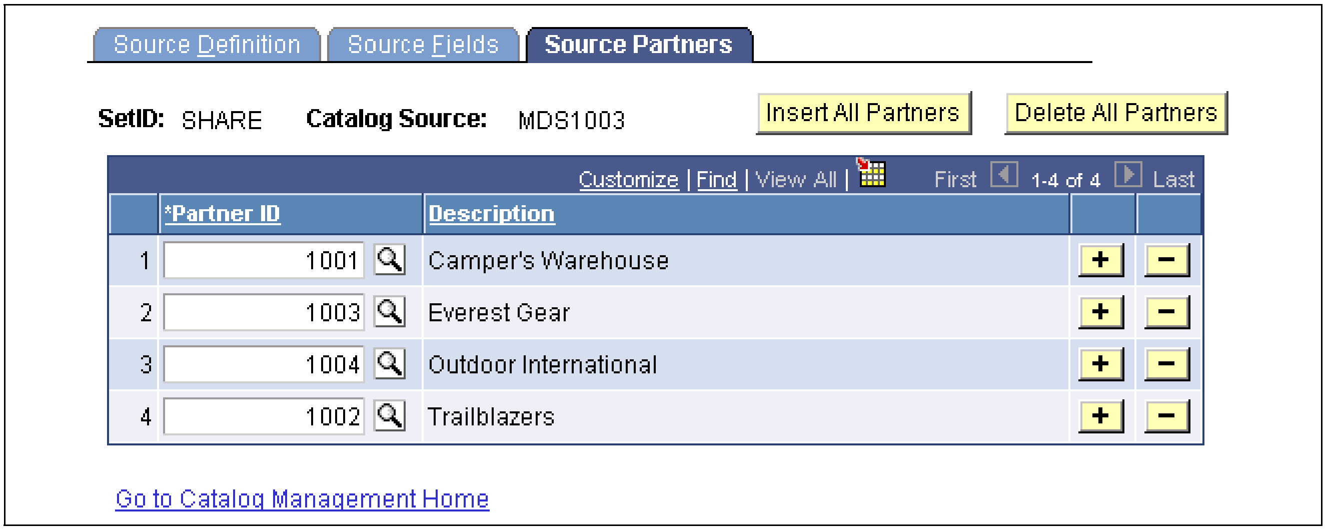
Note. Functionality to allow partners to define their own catalog sources and map definitions also exists.

Pages Used to Define Master Catalog Sources

Page Name	Object Name	Navigation	Usage
Define Master Catalog Source - Source Definition	EOCM_DATA_MST	Catalog Management, Catalog Management Home Page, Maintain Catalog Source Select the Define Master Catalog Source link located on the Maintain Catalog Source page. Catalog Management, Catalogs, Maintain Catalog Sources Select the Define Master Catalog Source link located on the Maintain Catalog Source page.	Specify the file format to use to import the partner source catalog data.
Define Master Catalog Source - Source Fields	EOCM_DSMST_FLDS	Catalog Management, Catalog Management Home Page, Maintain Catalog Source, Define Master Catalog Source, Source Definition, Source Fields Catalog Management, Catalogs, Maintain Catalog Sources, Define Master Catalog Source, Source Definition, Source Fields	Specify the fields contained in the source file. Identify character qualifiers for particular fields and characters that should be stripped from the data.
Define Master Catalog Source - Source Partners	EOCM_DSMST_PRT	Catalog Management, Catalog Management Home Page, Maintain Catalog Source, Define Master Catalog Source, Source Definition, Source Partners Catalog Management, Catalogs, Maintain Catalog Sources, Define Master Catalog Source, Source Definition, Source Partners	Identify the partners that will share this master catalog source layout.

Defining Master Catalog Sources

Access the Source Partners page for defining partners.



Source Partners page

The source definition page used to define a master catalog source, is similar to the source definition page used to define a catalog source for a single partner. The only difference is the way partners are associated to the source format. When defining a catalog source for a single partner the key fields are setID, partner ID, and Catalog Source.Values for these fields are entered on the Search page. When defining a master catalog source the key fields are setID and Catalog Source. Partners who will share this source format are identified on the Source Partners page.

To identify partners:

1. Go to the Source Partners page.
2. Add the partners that will share this source layout.

   Click the Insert All Partners button to automatically add all partners registered in Catalog Management. Click Delete All Partners to remove all partners from the list.
3. Click Save to capture changes.

Importing Source Data

This section provides an overview of the source data import process and discusses how to:

- Import partner source data into Catalog Management.
- Import partner source data using a master catalog source.
- View and correct import errors.

Note. This activity can be performed by the partner if the partner has been granted privileges.

See Also

Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Partners and Granting Privileges, page 31

Understanding the Source Data Import Process

When a partner changes a source file, such as adding new offerings, deleting offerings, or updating prices, the catalog management business process flow cycle begins, starting with the process of importing the updated source file into a temporary table in Catalog Management. Once imported, the data is available to be transformed and loaded into the enterprise catalog.

Managing Errors

The system allows the import process to run to completion even if errors are encountered. The system captures the error information and presents the user with this set of options:

- Delete the error rows for a specified file.
- Delete all the imported data for a specific file.
- Export error rows to an external .txt file, correct the errors in this file, and then re-import the file by appending it to the previously imported data.

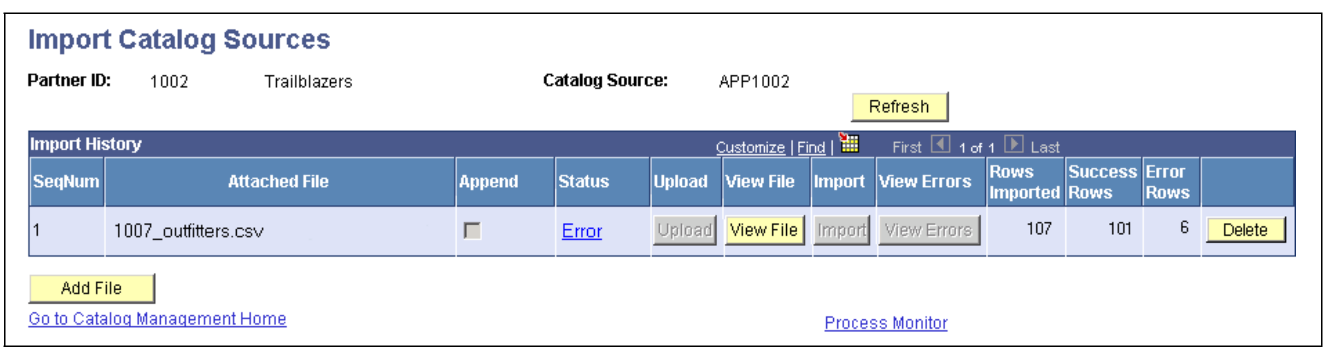
Pages Used to Import Source Data

Page Name	Object Name	Navigation	Usage
Import Catalog Sources	EOCM_IMPORT_PAGE	Catalog Management, Catalog Management Home, Import Catalog Source Catalog Management, Catalogs, Import Catalog Source	Choose to import either catalog sources or a master catalog source.
Import Catalog Sources	EOCM_DS_LOAD_1	Catalog Management, Catalog Management Home, Import Catalog Source, Import Catalog Sources Select the Import Catalog Sources link located on the Import Catalog Sources page. Catalog Management, Catalogs, Import Catalog Sources, Import Catalog Sources Select the Import Catalog Sources link located on the Import Catalog Sources page.	Import partner offering data from a partner source file.

Page Name	Object Name	Navigation	Usage
Import Master Catalog Sources	EOCM_DS_LOAD_M	Catalog Management, Catalog Management Home, Import Catalog Source, Import Catalog Sources Select the Import Master Catalog Source link located on the Import Catalog Sources page. Catalog Management, Catalogs, Import Catalog Source, Import Catalog Sources Select the Import Master Catalog Source link located on the Import Catalog Sources page.	Import partner-offering data using a shared catalog source definition.
Import Status Details	EOCM_DS_STATUS_SEC	Catalog Management, Catalog Management Home Page, Import Catalog Source Catalog Management, Catalogs, Import Catalog Sources Click the Status link located on the Import Catalog Sources page.	View detail import process information for a particular file.
Data Source Import Error Detail	EOCM_DS_ERR_SEC	Catalog Management, Catalog Management Home Page, Import Catalog Source Catalog Management, Catalogs, Import Catalog Sources Click the View Errors button.	View details of errors that occurred during the import process.

Importing Partner Source Data Into PeopleSoft Catalog Management

Access the Import Catalog Sources page.



Import Catalog Sources page

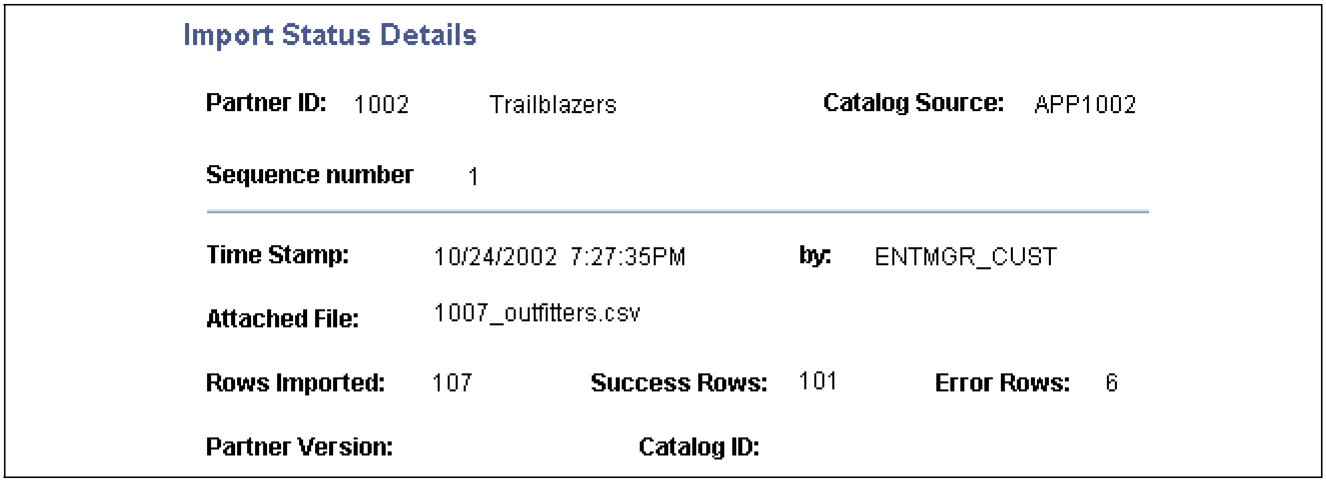
This page shows the import history for the selected partner ID and catalog source. From this page you can view or delete previously imported data files, or add a new file to be imported.

Partner ID and **Catalog Source**	Values are based on the source layout you selected on the Import Catalog Sources Search page.
Append	Select to append additional files to the associated file. **Note.** The check box will be disabled for files that have been imported successfully.
Status	Click the link to go to the Import Status Details page and view more detail information about the status of the import process. See Chapter 6, "Importing Partner Source Files," Importing Partner Source Data Using a Master Catalog Source, page 48.
Upload	Click to upload the source file. Use the browse button to locate and select the desired file. Once selected, the path to the file is displayed. Click the Upload button to upload the file and return to the Import Catalog Sources page. The name of the selected file appears in the Attached File field, and the status of the file is *Uploaded.* **Note.** The View File and Import buttons are now active.
View File	Click to review the contents of the source file.
Import	Click to import the offering data into Catalog Management. A process request is submitted. Click the Process Monitor link to monitor the status of the request. The status of the file changes to *Imported* when the file has been successfully imported. Click the Refresh button to update the status. **Note.** This button becomes inactive once the file has been imported.
View Errors	If an error occurs, the status is updated to *Error* when you click the Refresh button. This button becomes active. Click to view and correct import errors.
Rows Imported, Success Rows and **Error Rows**	Displays the total number of rows imported, the number of rows imported successfully, and the number of rows that caused errors.
Add File	Click to add a new row. The next sequence number appears in the SeqNum field.

Note. The import process leverages PeopleTools file attachments, which can be configured to use either the FTP or HTTP transfer protocol. File attachments are supported by using PeopleCode built-ins that implement the transfer of a file to or from a browser using the application server.

Import Status Details

Access the Import Status Details page.



Import Status Details page

Use the Import Status Details page to view more detailed import process information for the selected file.

See Also

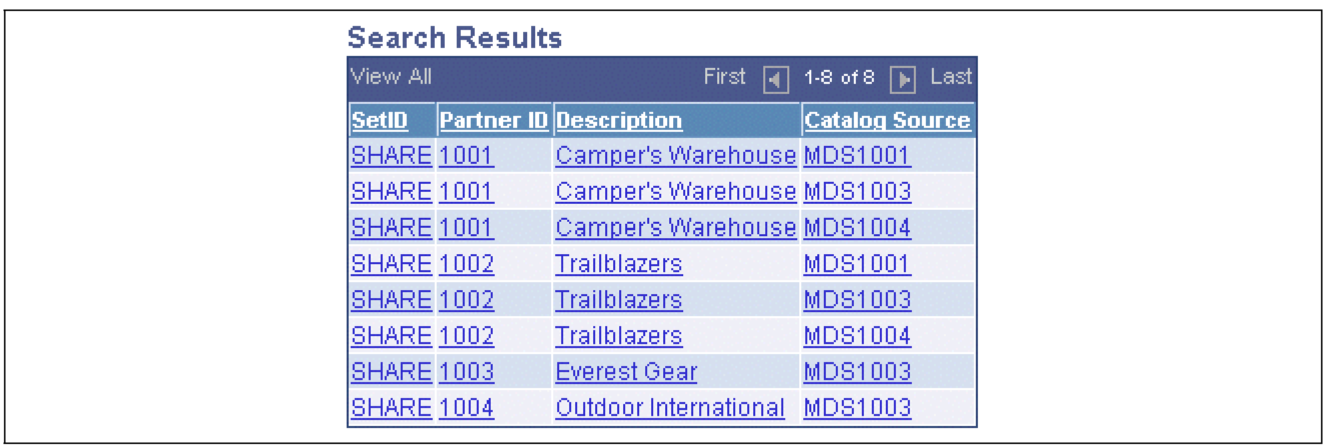
Chapter 6, "Importing Partner Source Files," Defining Catalog Source Layouts, page 35

Enterprise PeopleTools 8.46 PeopleBook: PeopleCode Developer's Guide.

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler.

Importing Partner Source Data Using a Master Catalog Source

The process of a master catalog source definition is similar to the process you use for importing partner-offering data using a catalog source definition for a single partner. The only difference is when you select the catalog source you want to import. In the master catalog source situation, the same catalog source may be listed multiple times in the search results.



Search Results

View All First 1-8 of 8 Last

SetID	Partner ID	Description	Catalog Source
SHARE	1001	Camper's Warehouse	MDS1001
SHARE	1001	Camper's Warehouse	MDS1003
SHARE	1001	Camper's Warehouse	MDS1004
SHARE	1002	Trailblazers	MDS1001
SHARE	1002	Trailblazers	MDS1003
SHARE	1002	Trailblazers	MDS1004
SHARE	1003	Everest Gear	MDS1003
SHARE	1004	Outdoor International	MDS1003

Example import master catalog source search results

To select a master catalog source to import:

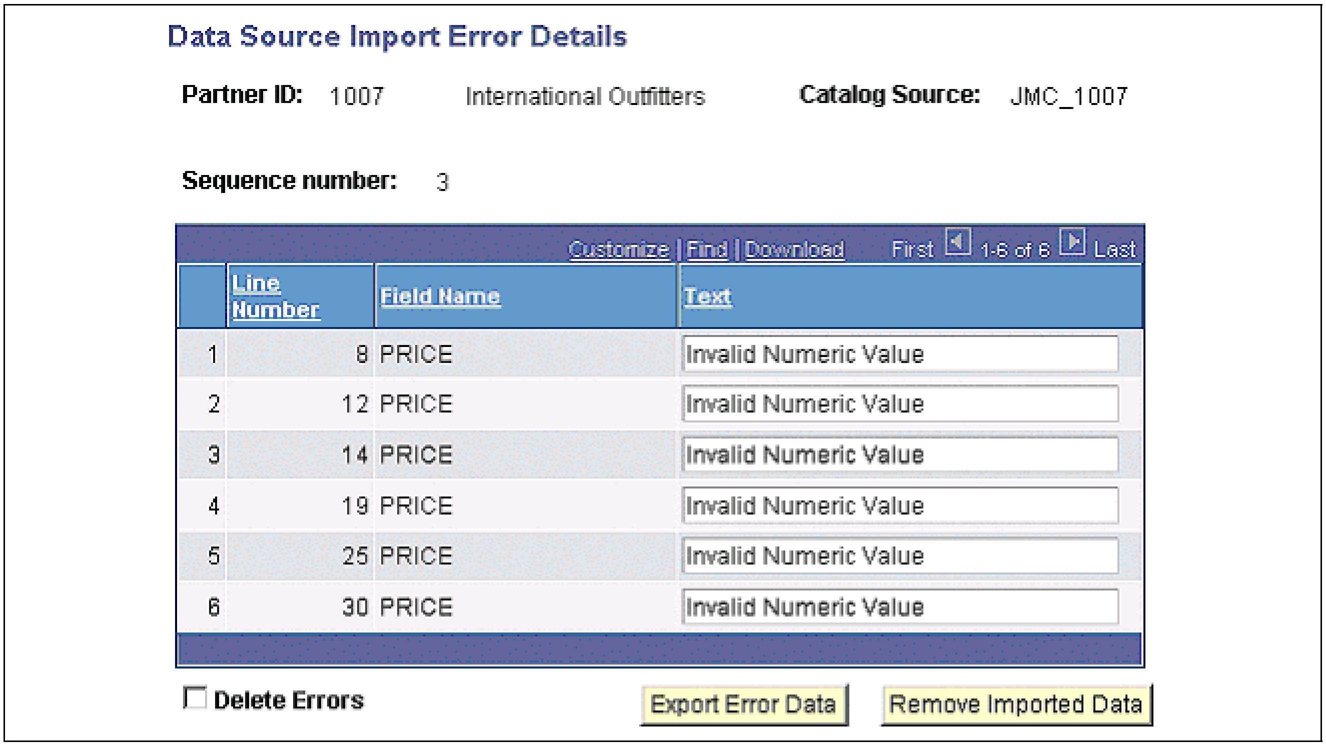
1. Access the Import Catalog Sources page.
2. Click the Import Master Catalog Source link.

   The Import Master Catalog Source search page appears.
3. Select the desired master catalog source file by setID, partner ID, and catalog source.

If multiple partners have been identified to share a specific master catalog source, that source file will be listed multiple times in the search results.

Viewing and Correcting Import Errors

Access the Data Source Import Error Details page.



Data Source Import Error Details page

Partner ID, Catalog Source and **Sequence Number** Values are based on the information from the Import Catalog Sources page.

Line Number Displays the row in the source file where the error occurred.

Field Name Displays the name of the field that caused the error.

Text Describes the error.

Delete Errors Select to delete error rows from a specific imported file.

Remove Imported Data Select to remove all the imported data from a specific file.

Export Error Data Select to export the error rows to a flat file.

Note. Once exported, you make corrections, and then re-import the data using the Append Data feature. The corrected data will be appended to the rows that were imported successfully.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleCode Reference.

CHAPTER 7

Mapping, Transforming, and Loading Partner Source Data

This chapter provides an overview of catalog mapping and loading maps and discusses how to:

- Define catalog maps.
- Transform and load data.
- Remove partner versions.

Note. These activities, except defining master map information, can be performed by the partner if the partner has been granted privileges.

See Also

Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Partners and Granting Privileges, page 31

Defining Catalog Maps

To define catalog maps, use the Define Catalog Maps (EOCM_MAP_DEFN) component.

This section provides an overview of the mapping process and using master maps, and discusses how to:

- Define map information.
- Define map field detail.
- Perform map edits.
- Preview map results.
- Add comments.

Note. This step need only be performed once as long as the format of the partner's source files or the enterprise target layout do not change.

Understanding the Mapping Process

Catalog mapping translates values from the catalog source data to the format of the enterprise catalog using default target values, transformations, translation sets, and map rules to facilitate the process. Although the majority of the data transformation setup and maintenance process is automated you may need to perform such tasks in Data Transformer before performing the tasks documented here for the Define Catalog Map component:

- Set up target field default values.

- Set up translation sets.
- Create transformations.
- Set up map rules.

Setting Up Target Field Defaults

The AutoMapper feature populates the map field details with the field value based on the target field. If Allow Map Override is not selected, you cannot override the field value at the map level. A default with no value is initialized to a blank, zero, or the appropriate PeopleSoft null value.

When setting the default values, consider the target field data type format. Character fields are used for names, codes, and letter values. Uppercase converts the field value to uppercase and signifies that no other formatting options apply to this field. Mixed case stores uppercase and lowercase characters as entered. Number fields and signed number fields are fixed in field length and allow the entry of positive numbers. Only signed numbers allow the entry of negative numbers. Date fields contain calendar dates. A date field has a field length of 10 and is maintained by the system. The default format of a date field is defined by the database and can be overridden by the browser settings.

Setting Up Translation Sets

You use translation sets to define equivalent values or a code set for data conversion, for example: EA = Each, GAL = Gallon, IN = Inch. The translation to and from values can be applied as a required rule to the map rule definition; the value is used by the AutoMapper feature based on a source input and target field in the map definition. If the value is not a required rule, you can select *Translation Set* when completing the map field details. Enter translation set values for map definition details, used as equivalent values for data transformation.

Creating Transformations

When data is copied from the source to the target, the data can be transformed using edits, lookups, or PeopleCode. Transformations allow you to change a column’s value.

Note. Use the Data Transformer transformation wizard to guide you through the process of creating transformations.

Setting Up Map Rules

You can create rules to be used by the AutoMapper feature in the map field detail definition. You use rules to assign correct default values to target fields when creating maps. Using map rules, you can assign a literal default, transformation, source field, or a translation set to the target field. If the map rule is required, you cannot override the rule on the Define Catalog Map - Map Field Detail page.

Note. To access the Data Transformer Map Rules page, you need to update permissions for the delivered roles or assign additional roles.

See Also

PeopleSoft Data Transformer for PeopleSoft Enterprise Financial Management Solutions, Enterprise Service Automation, Asset Lifecycle Management, and Supply Chain Management 8.9 PeopleBook, “Preparing to Create Maps”

Enterprise PeopleTools 8.46 PeopleBook: Security Administration.

Understanding Master Maps

Unlike defining map information for a single partner, defining master map information is performed at the enterprise catalog level. The pages used to enter the information are the same.

To associate the map to a master catalog source, the lookup you use to select a source data object on the Map Information page, is restricted to only source data objects created for master catalog source definitions. When the source data object is selected, the map is associated to a master catalog source as well as the partners identified to share the selected source.

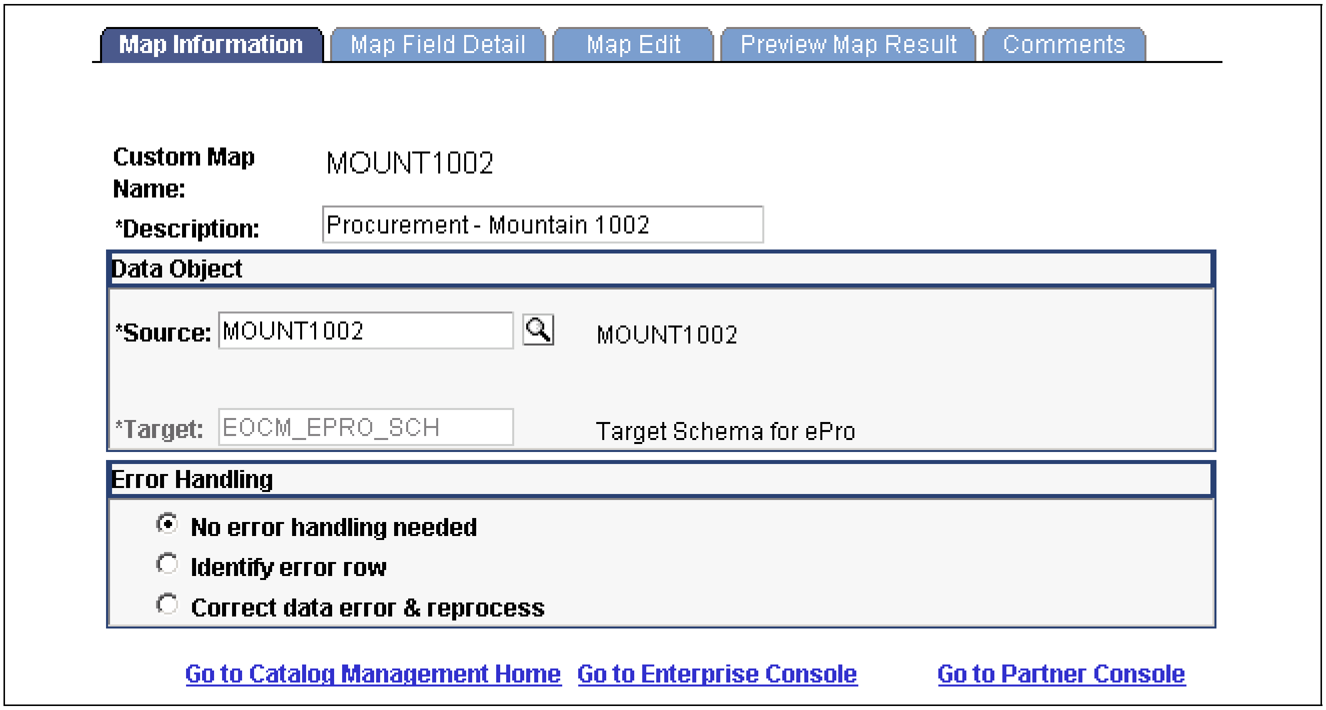
Pages Used to Define Catalog Maps

Page Name	Object Name	Navigation	Usage
Define Catalog Map - Map Information	EOEW_MAP_DFN	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Define Catalog Map, Map Information	Enter general mapping information.
Define Catalog Map - Map Field Details	EOEW_MAP_FLD	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Define Catalog Map, Map Field Detail	Enter field-level mapping definitions.
Define Catalog Map - Map Edit	EOEW_MAP_EDIT	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Define Catalog Map, Map Information	Edit map source input values used in transformation sets.
Define Catalog Map - Preview Map Results	EOEW_TARPREVIEW	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Define Catalog Map, Preview Map Results	View a subset of the data based on the defined map.
Define Catalog Map - Comments	EOEW_MAP_COMMENT	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Define Catalog Map, Map Information, Comments	Enter comments related to this map definition.

Page Name	Object Name	Navigation	Usage
Define Master Catalog Map - Map Information	EOEW_MAP_DFN	Catalog Management, Catalog Management Home Select an enterprise catalog. Define Master Catalog Map, Map Information	Enter general mapping information.
Define Master Catalog Map - Map Field Details	EOEW_MAP_FLD	Catalog Management, Catalog Management Home Select an enterprise catalog. Define Master Catalog Map, Map Field Detail	Enter field-level mapping definitions.
Define Master Catalog Map - Map Edit	EOEW_MAP_EDIT	Catalog Management, Catalog Management Home Select an enterprise catalog. Define Master Catalog Map, Map Information	Edit map source input values used in transformation sets.
Define Master Catalog Map - Preview Map Results	EOEW_TARPREVIEW	Catalog Management, Catalog Management Home Select an enterprise catalog. Define Master Catalog Map, Preview Map Results	View a subset of the data based on the defined map.
Define Master Catalog Map - Comments	EOEW_MAP_COMMENT	Catalog Management, Catalog Management Home Select an enterprise catalog. Define Master Catalog Map, Map Information, Comments	Enter comments related to this map definition.

Defining Map Information

Access the Define Catalog Map - Map Information page.



Define Catalog Map - Map Information page

Source

Select the source file for this map.

The source selected should be the name specified as the source data object when the catalog source layout was defined.

Target

Automatically populated based on the enterprise catalog selected when navigating to this page. The value cannot be overridden.

This value controls the target fields available on the Define Catalog Map - Map Field Details page.

Error Handling

Select from:

No error handling needed. Data validation is not performed and all rows are inserted into the target table.

Identify error row: Currently not available.

Correct data error & reprocess: Data validation is performed. Valid rows are inserted into the target table and invalid rows are inserted into a user-defined error table.

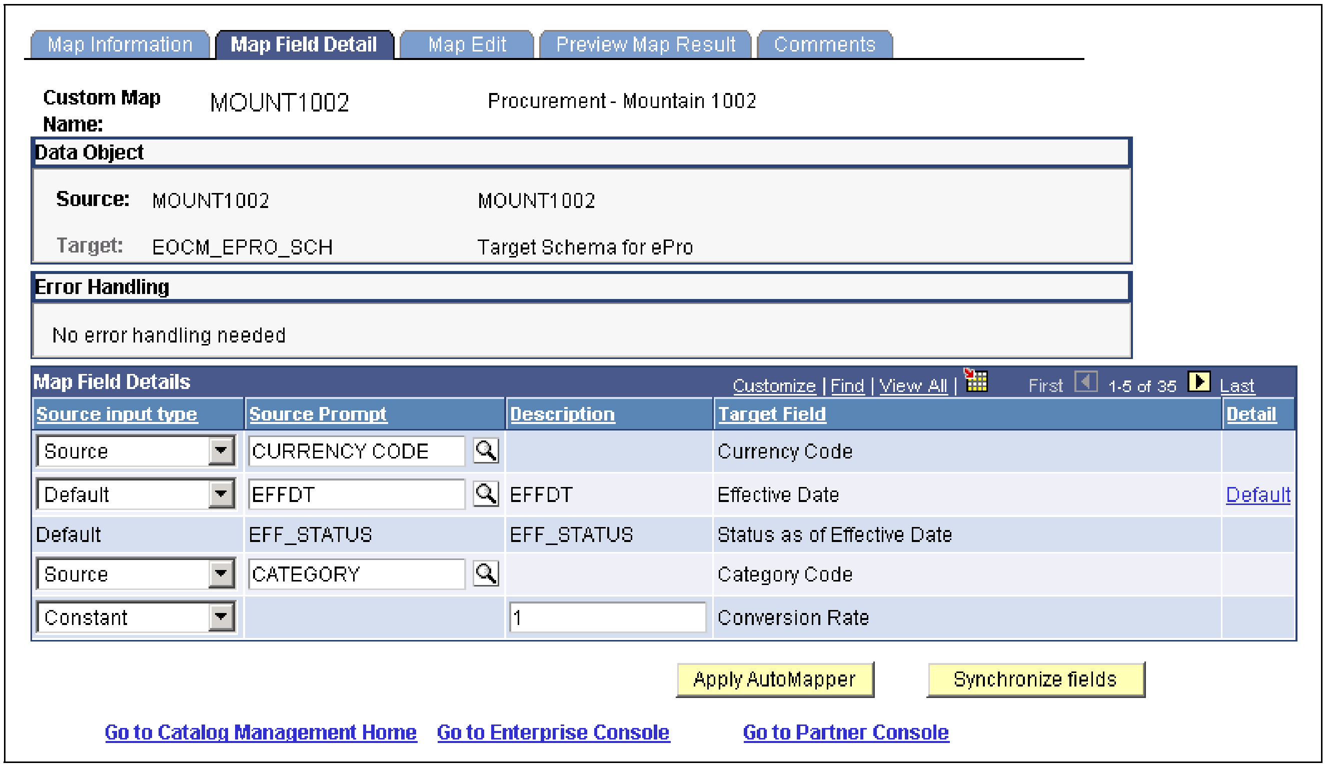
Note. The user-defined error table must be created by the system administrator in Application Designer before attempting to load the defined map.

See Also

Chapter 6, “Importing Partner Source Files,” Defining Catalog Source Layouts, page 35

Defining Map Field Details

Access the Define Catalog Map - Map Field Detail page.



Define Catalog Map - Map Field Detail page

To define map field details, click the Apply AutoMapper button.

AutoMapper automatically attempts to match the source to target field list. It also applies any required map rules, including target field defaults, translation set values, and transformations. AutoMapper then maps remaining target fields with constant values from the PSRECFIELD.DBFIELDNAME.SQL assembler, and coordinate the transformation steps.

If modifications to the mapping defined by AutoMapper is required, make changes to these options:

Source Input Type

Select from:

Source: Select if the value is from the source file. You are prompted to select a source prompt field from the source file.

Constant: Select if the value is a constant value, then enter that value.

Default: Select to use a default value, then select a source prompt. Click the Default link to access the Set Target Field Default page.

Transformation: Select to use a transformation, then select a source prompt. Click the Transform link to view transformation definitions, or click the Add link to add a new definition using the Transformation wizard.

Translation Set: Select to use a translation set, then select a source prompt. Click the Translation link to view translation set values, or click the Add link to add a new set.

Important! If you select the Source Input Type of Source, the Source Prompt lookup will include EOCM_ACCESS_ID. Do not select as mapping is performed automatically for this field.

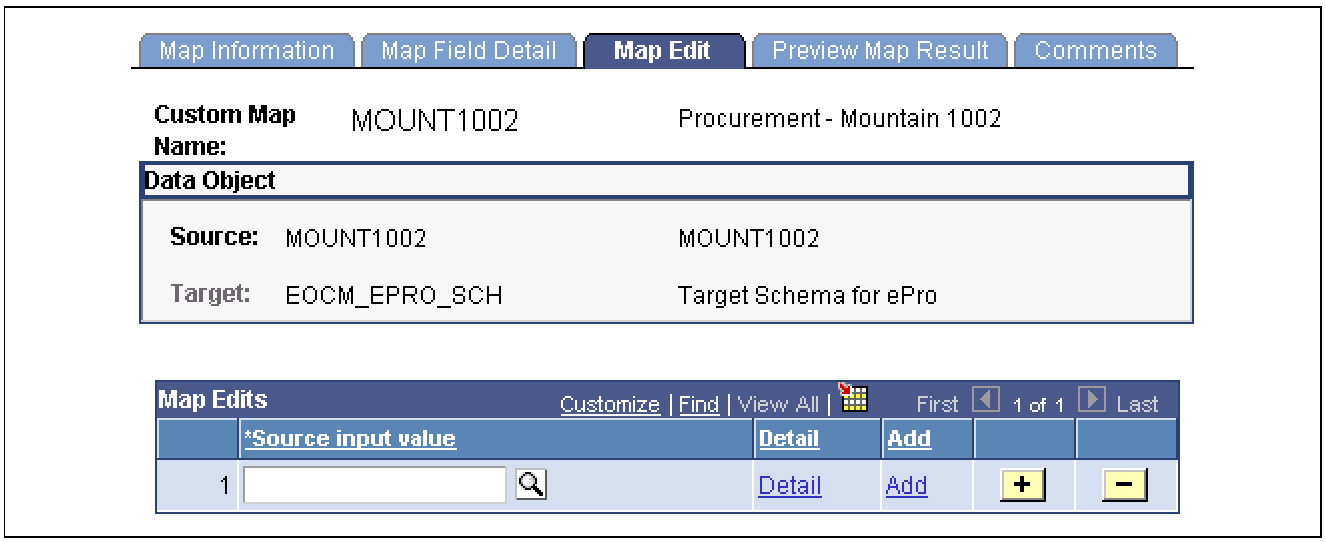
Source Prompt	Select a source prompt based on the source input type.
Description	Enter a description if you selected *Constant* as the input type.
Target Field	Lists the name of all the fields contained in the target file.
Details	Either the Transform, Default, or the Translation link appears, based on the selected input type.
Add	The Add link appears if the selected input type is either *Transformation* or *Translation Set.*

See Also

PeopleSoft Data Transformer for PeopleSoft Enterprise Financial Management Solutions, Enterprise Service Automation, Asset Lifecycle Management, and Supply Chain Management 8.9 PeopleBook, "Preparing to Create Maps"

Performing Map Edits

Access the Map Edit page.



Map Edit page

Select a new source input value to replace or add to the current source. Click the Detail link to access the Transformation Definition page and edit transformation definition information. Click the Add link to access the Transformation Definition page and add a new transformation.

See Also

PeopleSoft Data Transformer for PeopleSoft Enterprise Financial Management Solutions, Enterprise Service Automation, Asset Lifecycle Management, and Supply Chain Management 8.9 PeopleBook, "Preparing to Create Maps"

Previewing Map Results

Access the Preview Map Results page.

Click the Preview button to view a subset of mapped data based on the map definitions.

Note. Map results are only available to preview after the partner source file has been imported.

Transforming and Loading Data

This section provides an overview of the transformation and loading process and discusses how to transform and load offering data.

Understanding the Transformation and Loading Process

After a partner's offering data has been successfully imported into Catalog Management, it can be transformed into the enterprise catalog format and then loaded into the enterprise catalog.

The transformation of data is based on the catalog map that you defined for the partner's source file.

You can use three different methods to load offering data into the enterprise catalog:

- Incremental update.

  The system updates the most recently loaded data. Required changes are made to existing data, such as price changes, and new offering data is added.

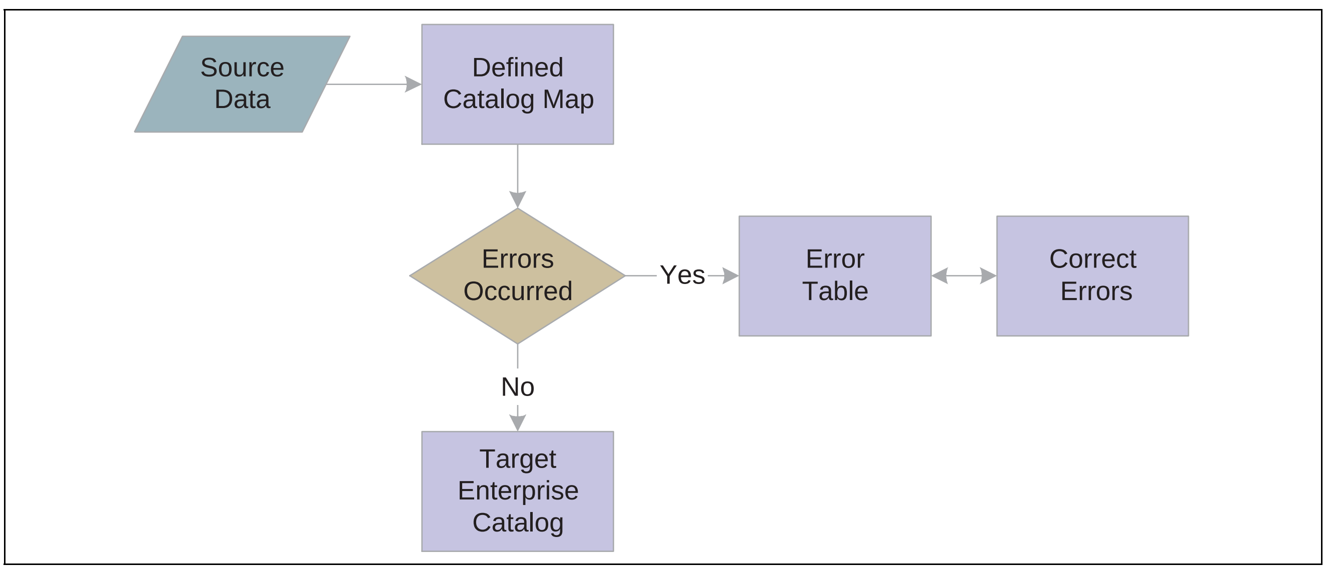
- Full load.

  The system replaces the current data with the new data.

- Error recycle only.

  If errors occurred during a previous attempt, this is the only option available. The system uses the data in the corrected error table as the source data.

The following diagram illustrates the transformation and loading data process:



Transformation and loading of source data

Note. The process of transferring and loading data from a shared catalog source to the enterprise catalog format, using a master data map is similar to transferring and loading data for a single partner. The only difference is when you select the catalog map object. The selection is restricted to master catalog maps associated to the selected partner.

See Also

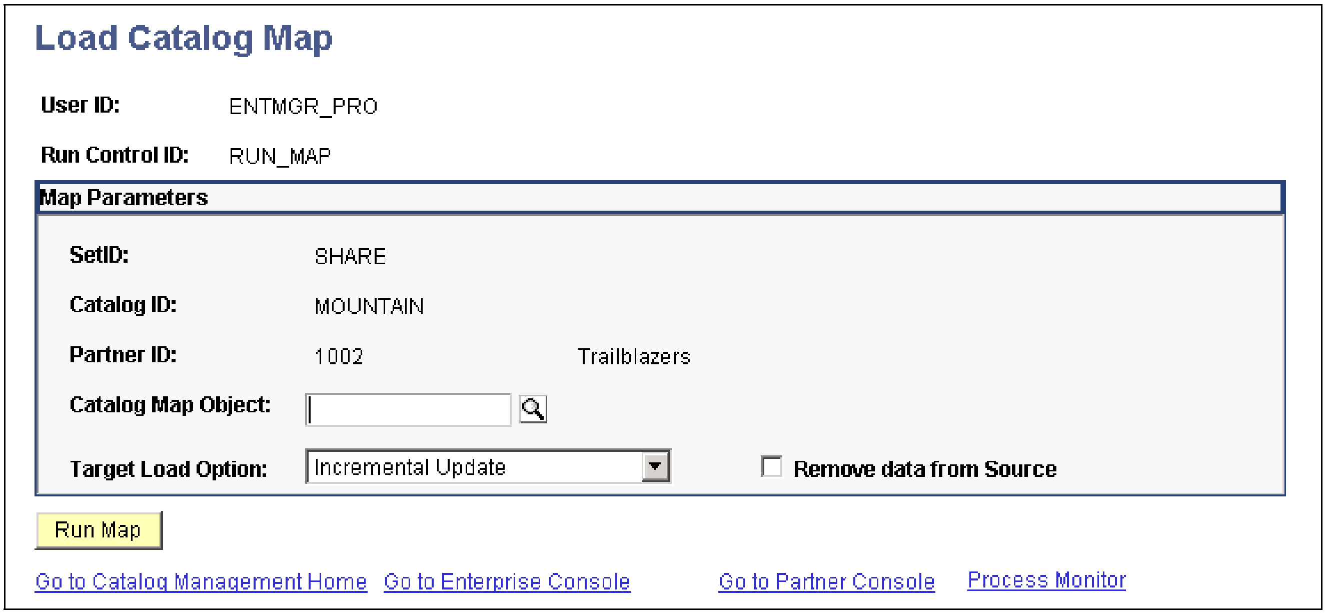
Chapter 7, "Mapping, Transforming, and Loading Partner Source Data," Defining Catalog Maps, page 51

Pages Used to Transform and Load Data

Page Name	Object Name	Navigation	Usage
Load Catalog Map	EOCM_RUNMAP_PAGE	Catalog Management, Catalog Management Home. Select an enterprise catalog. Select a partner catalog. Load Catalog Map	Choose to load either a catalog map or a master catalog map.
Load Catalog Map	EOCM_RUN_ETL	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Load Catalog Map. Select the Load Catalog Map link located on the Load Catalog Map page.	Transform partner source data to enterprise catalog format based on the defined catalog map, and then load the newly formatted data to the enterprise catalog.
Load Catalog Master Map	EOCM_RUNMST_ETL	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Load Catalog Map. Select the Load Master Catalog Map link located on the Load Catalog Map page.	Transfer and load data from a shared catalog source to the enterprise catalog format using a shared data map.

Transforming and Loading Offering Data

Access the Load Catalog Map page.



Load Catalog Map page

Set ID and **Catalog ID**

Values are based on the enterprise catalog selected on the Catalog Management Home page.

The name of the enterprise catalog is displayed to the right of the catalog ID.

Partner ID

The value is based on the partner catalog selected on the Enterprise Catalog Console page.

The name of the partner source is displayed to the right of the partner ID.

Catalog Map Object

Select the catalog map defined for this partner source file.

Target Load Option

Select from:

- *Attachment Only.*
- *Error Recycle Only.*
- *Full Load.*
- *Incremental Update.*
- *Price Only*

Note. The *Error Recycle Only* option is available only if errors exist.

Remove Data From Source

Select if you no longer require this source data.

Run Map

Click to transform and load the offering data.

Note. A new version of the partner offering data is created once the transformation and load process has completed.

Using Attachment Only Target Load Option

An *Attachments Only* load give users the opportunity to add attachments to offerings that already exist in a staged or production version of the catalog without having to import, load, and categorize the offerings again. Attachments can also be associated to offerings using Maintain Partner Offerings.

If you have a different file format for updating attachments, you will need to create a new source definition and define a second catalog map to use when performing an *Attachments Only* load. At a minimum, this map definition must contain mapping information for the attachment and key fields. For example:

- Vendor Item ID.
- File Name.
- File Extension.
- File Path.

Note. An *Attachments Only* load can be performed only when the most recent version has a status of Staged or Production.

If you performed an *Attachments Only* load, the system will make a copy of the most recent partner version and increment the version by 1. For example, if the most recent version is version 5, the system copies that version to version 6. The system will then update offerings with the new attachments using the key fields to match offerings. The system will ignore offerings that have no match. The new version is automatically staged.

Using Price Only Target Load Option

A *Price Only* source data load give users the opportunity to update price fields for offerings that already exist in a staged or production version of the catalog without having to import, load, and categorize the offerings again.

If you have a different file format for updating prices, you must create a new source definition and define a second catalog map to use when performing a *Price Only* load. At a minimum, this map definition must contain mapping information for the prices and the key fields. For example:

- Vendor Item ID.
- Unit of Measure.
- Vendor Price.

Note. A *Price Only* load can be performed only when the most recent version has a status of staged or production. If the most recent version does not have a status of staged or production, the only available target load options will be *Full Load* or *Incremental Update.*

When you perform a *Price Only* load, the system will make a copy of the most recent partner version and increment the version by 1. For example, if the most recent version is version 5, the system copies that version to version 6. The system will then update offerings with the new prices using the key fields to match offerings. The system will ignore offerings that have no match. The new version is automatically staged.

See Also

Chapter 2, “Understanding PeopleSoft Catalog Management,” Creating Versioning, page 9

Removing Partner Versions

This section provides an overview of the removal process and discusses how to remove unused partner versions.

Understanding the Removal Process

Catalog Management allows catalog managers and partners to load and maintain several different versions of a partner's data. Once a version is selected for production, all other versions are stored but not used again. The remove Unused Versions feature provides a way for the catalog manager to remove these unused partner versions.

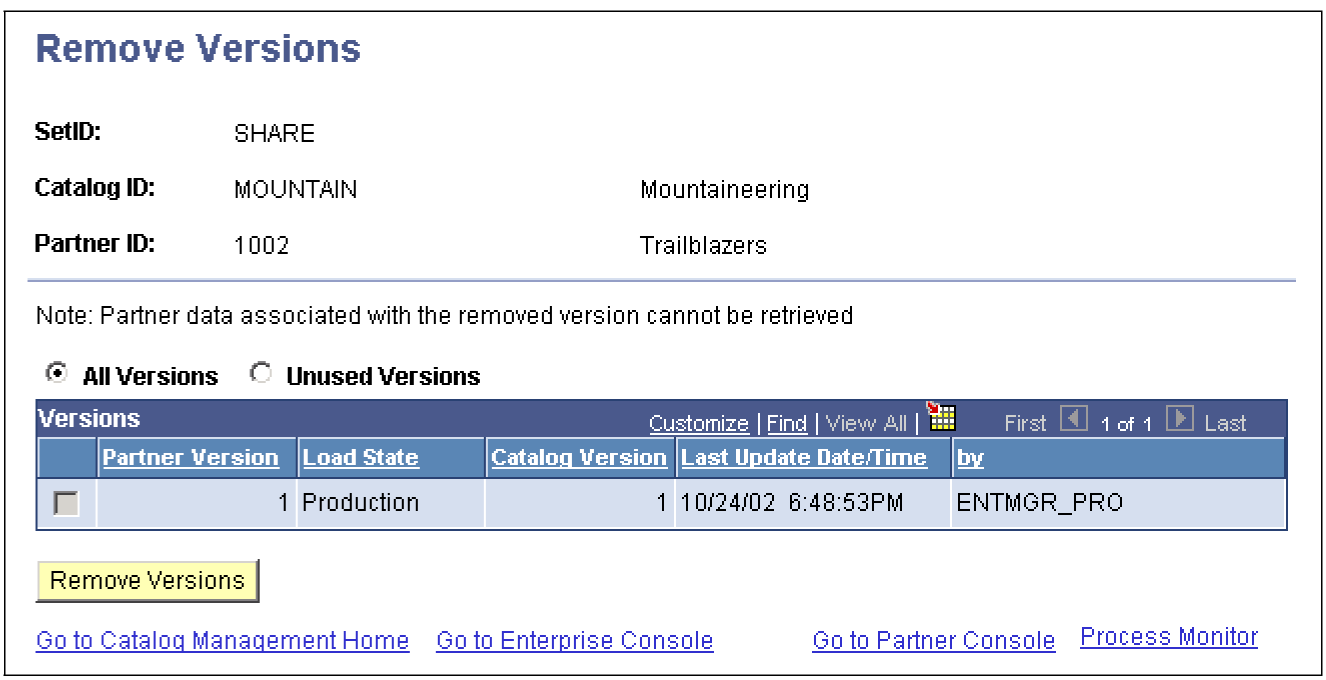
Important! Remove means deleting all the partner data. Once removed, the partner version cannot be retrieved.

Page Used to Remove Unused Partner Versions

Page Name	Object Name	Navigation	Usage
Remove Versions	EOCM_VER_REM	Catalog Management, Catalog Management Home. Select an enterprise catalog. Select a partner catalog. Remove Unused Versions.	Delete all the data for the selected partner version and clean up all the records that point to that partner version.

Removing Unused Partner Versions

Access the Remove Versions page.



Remove Versions page

SetID and **Catalog ID**

Values are based on the enterprise catalog selected on the Catalog Management Home page

Partner ID

Value is based on the partner catalog selected on the Enterprise Console.

All Versions or **Unused Versions**

Select *All Versions* to list all versions of partner data for this partner. Select *Unused Versions* to list only those versions that are no longer used. (Default).

Versions

Displays a list of partner versions based on the previous selection, including these options:

- Partner Version.
- Load State. For example, *Loaded, Categorized, Staged, Production.*
- Catalog Version.
- Last Update Date/Time.
- Last Update User ID.

Select

Select the associated check boxes to select the partner versions you want to remove. The check box will be disabled for:

- Version that has been moved to production.
- Currently staged version.
- Latest version.

Remove Versions

Click to run the application engine EOCM_REM_VER process. The process is submitted. Click the Process Monitor link to monitor the status of the request.

Note. Once removed, the partner version cannot be retrieved.

CHAPTER 8

Categorizing Offering Data

This chapter provides an overview of configurable categorization and the categorization process and discusses how to:

- Create categorization rules.
- Define category substitutions.
- Categorize offerings.
- Review categorization results.
- Approve proposed categories and catalog offerings.

Understanding Configurable Categorization and the Categorization Process

With categorization, you associate partner offerings to catalog offerings, and group them into enterprise catalog categories. Configurable categorization improves the probability of automatically matching a partner's offering to an enterprise offering, and also the probability of automatically matching a partner's category to an enterprise category.

With configurable categorization, you can choose the fields used for matching partner offerings to catalog offerings, and also create rules based on those fields. Each rule can contain multiple conditions and can be applied to several partner catalogs across the same catalog type. It can also be specific to one partner catalog.

Category substitutions automatically match partner categories with enterprise categories, based on user-defined substitute categories. For example, the enterprise category Notebook Computers always matches the partner category Laptops. This feature can be used when you know that partners suggest certain categories and you want them matched with specific enterprise categories.

When reviewing categorization results, you can:

- Manually associate partner offerings to catalog offerings.
- Propose new catalog offerings when no association exists.
- Update partner offering information.
- Manually associate proposed new catalog offerings to catalog categories.
- Propose new categories when there is no match with existing catalog categories.

Note. The above activities, with the exception of creating rules and defining substitutions, can be performed by partners if they have been granted privileges.

After the categorization review process is complete, the offering assignments are ready to be approved by the enterprise catalog manager, and the partner catalog can be staged for inclusion in the next production version of the enterprise catalog.

Creating Categorization Rules

To create categorization rules, use the Maintain Categorization Rules (EOCM_CAT_RULE) component.

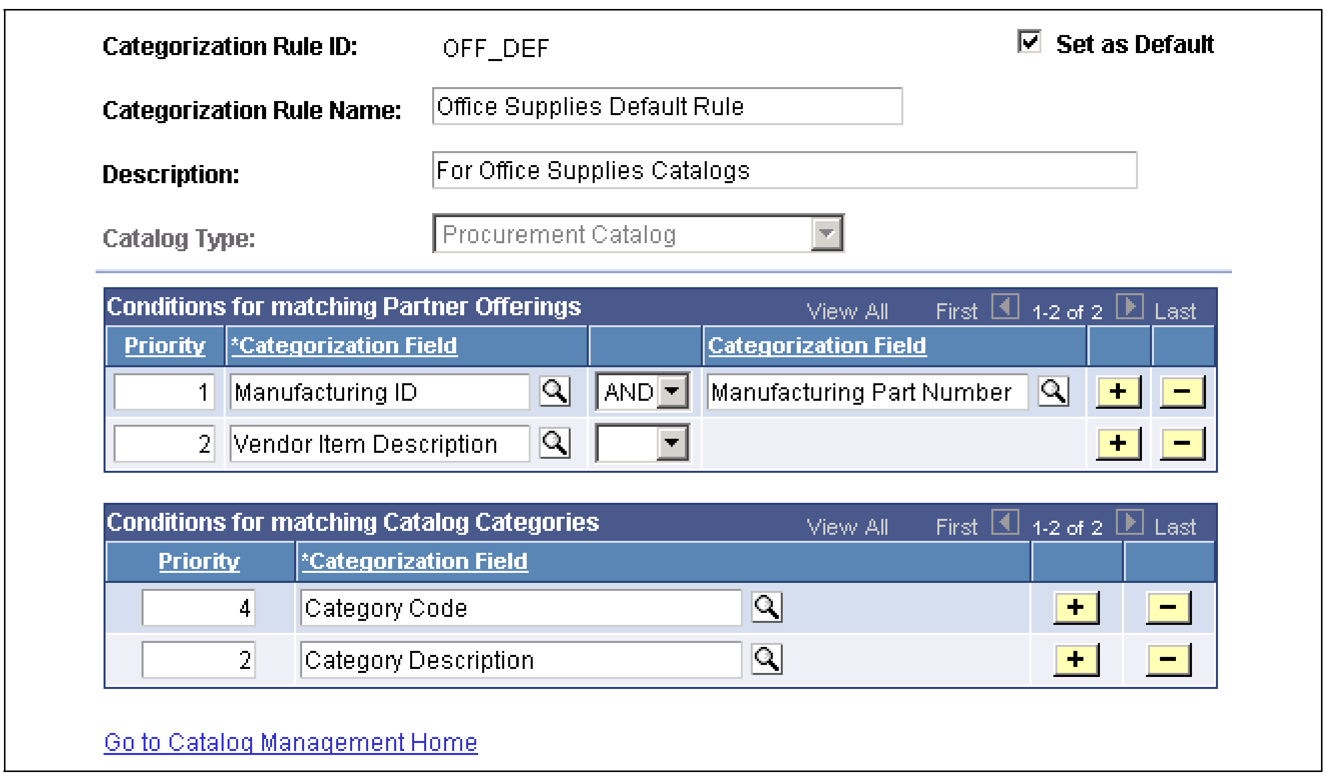
You use categorization rules to map between partner offerings and the business categories.

Pages Used to Create Categorization Rules

Page Name	Object Name	Navigation	Usage
Maintain Rules	EOCM_CAT_RULE	Catalog Management, Catalog Management Home, Maintain Categorization Rules	Create and maintain rules, made up of conditions in priority order, for the categorization process.

Creating Rules

Access the Categorization Rules page.



Maintain Categorization Rules page

Catalog Type Select the catalog type for this rule.

Note. The categorization fields available to create rule conditions are based on the catalog type and the fields selected on the Installation Options - Categorization page.

Set as Default

Select to use the rule as the default for the categorization process.

This selection overrides any previous selection. Only one default per catalog type is allowed.

Priority

Define the priority order. The system automatically prioritizes the conditions by the order entered. You can reorder the conditions. The system reads the priority order from low to high. Gaps in the numbering sequence are acceptable.

Categorization Field

Select a field for the condition.

Operator

(Optional) Select a logical operator. Required to add an additional field to the condition.

Note. Currently, *And* is the only option available. When you link two fields with *And,* an offering is considered a match only if both the first and second field match.

Only one categorization field is permitted for catalog category conditions.

Categorization Field

(Optional) Select a second field for the condition.

Relating Multiple Conditions

When a rule includes multiple conditions, PeopleSoft automatically links them using the OR operator. When two conditions are linked with OR, an offering is considered a match if the first or the second condition matches, not necessarily both. The conditions are evaluated in priority order, and as soon as one condition is satisfied, processing is complete for that offering.

See Also

Chapter 4, “Setting Up PeopleSoft Catalog Management,” Selecting Fields for Categorization Rules, page 16

Defining Category Substitutions

To define category substitutions, use the Translate (EOCM_TRANSLATE) component.

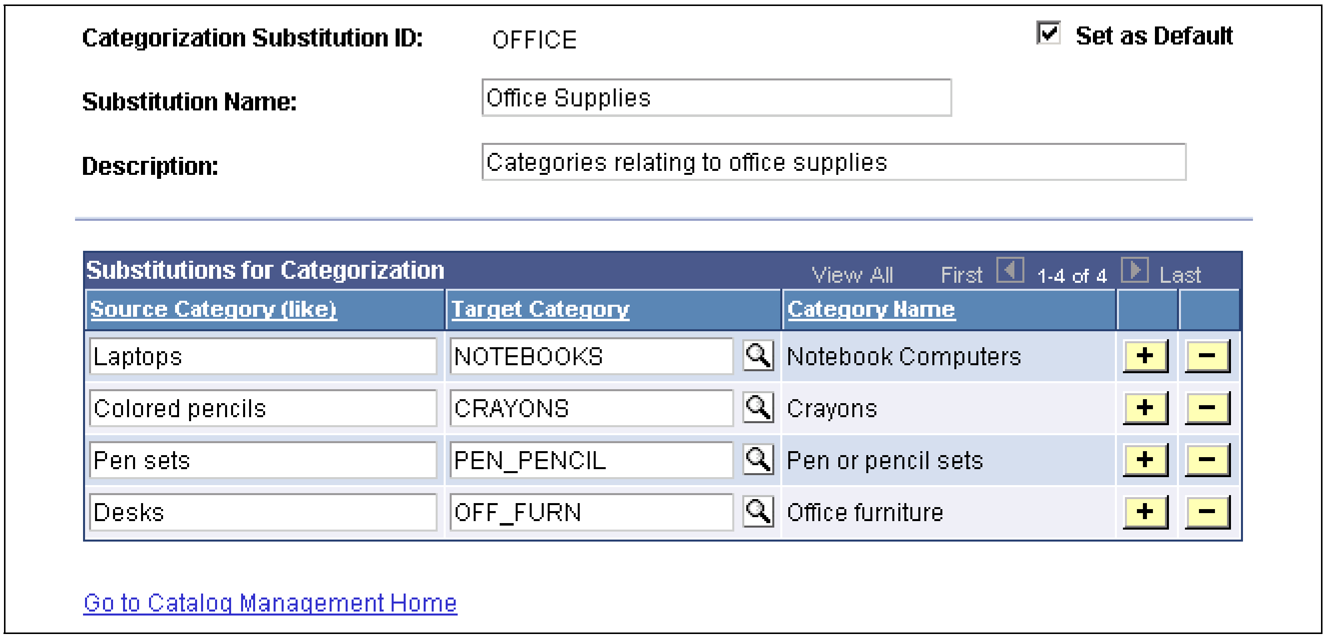
You use category substitutions when you know partners suggest certain categories and you want those categories replaced with internal categories.

Pages Used to Define Category Substitutions

Page Name	Object Name	Navigation	Usage
Maintain Substitutions	EOCM_TRANSLATE	Catalog Management, Catalog Management Home, Maintain Categorization Substitutions	Create and maintain substitutions for the categorization process.

Defining Substitutions

Access the Maintain Categorization Substitutions page.



Maintain Categorization Substitutions page

Substitution Name

Enter a name for this substitution set.

Note. Categorization Substitution ID and Substitute Name are the only fields available on the Search page.

Set as Default

Select to use the substitution set as the default for the categorization process.

This selection overrides any previous selection. Only one default per catalog type is allowed.

Source Category

Enter the partner category name. This is a free text field with no validation. The system finds categories that are very similar to the value entered. For example, if you enter *color pencils,* the system also finds *colored pencils* and *coloring pencils.*

Target Category

Select a category from the enterprise catalog. All partner offerings within the source category are grouped under the target category.

Categorizing Partner Offering Data

You use the Categorize Offerings page to review data and run the categorization process.

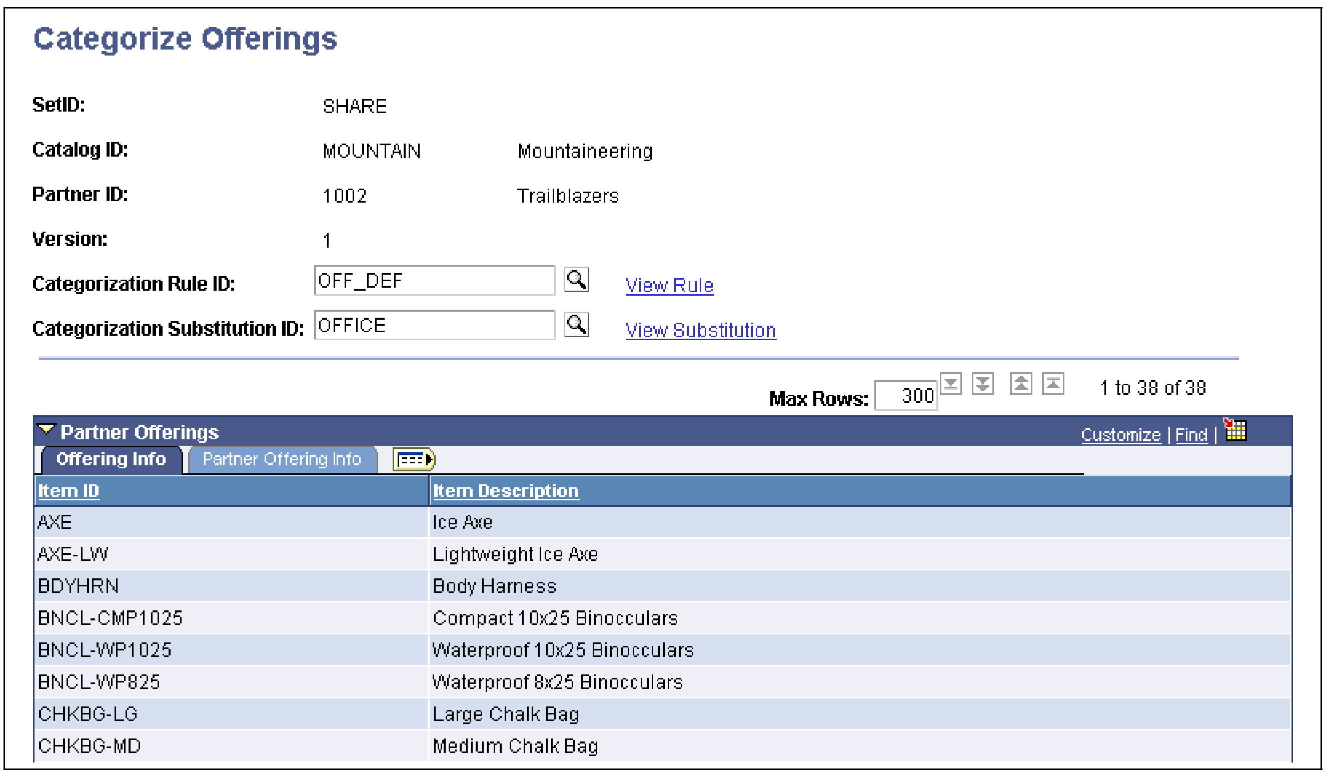
Note. At this stage of the process, you can only see offering data belonging to the selected partner. Categorization is the last step in preparing the data for consolidating with offerings from other partners.

Pages Used to Categorize Partner Offering Data

Page Name	Object Name	Navigation	Usage
Categorize Offerings	EOCM_CATEGORIZE	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Categorize Offerings	Review Run Catalog Map process (EOCM_RUN_MAP) results and launch the categorization process.

Categorizing Partner Offerings

Access the Categorize Offerings page.



Categorize Offerings page: Offering Info tab

Categorization Rule ID Select a rule.

If a rule has been set as the default, it is already selected.

View Rule Click to view the details of the selected rule in a new browser window.

Categorization Substitution ID Select a substitution set.

If a substitution set has been set as a default, it is already selected.

View Substitution Click to view the details of the selected substitution set in a new browser window.

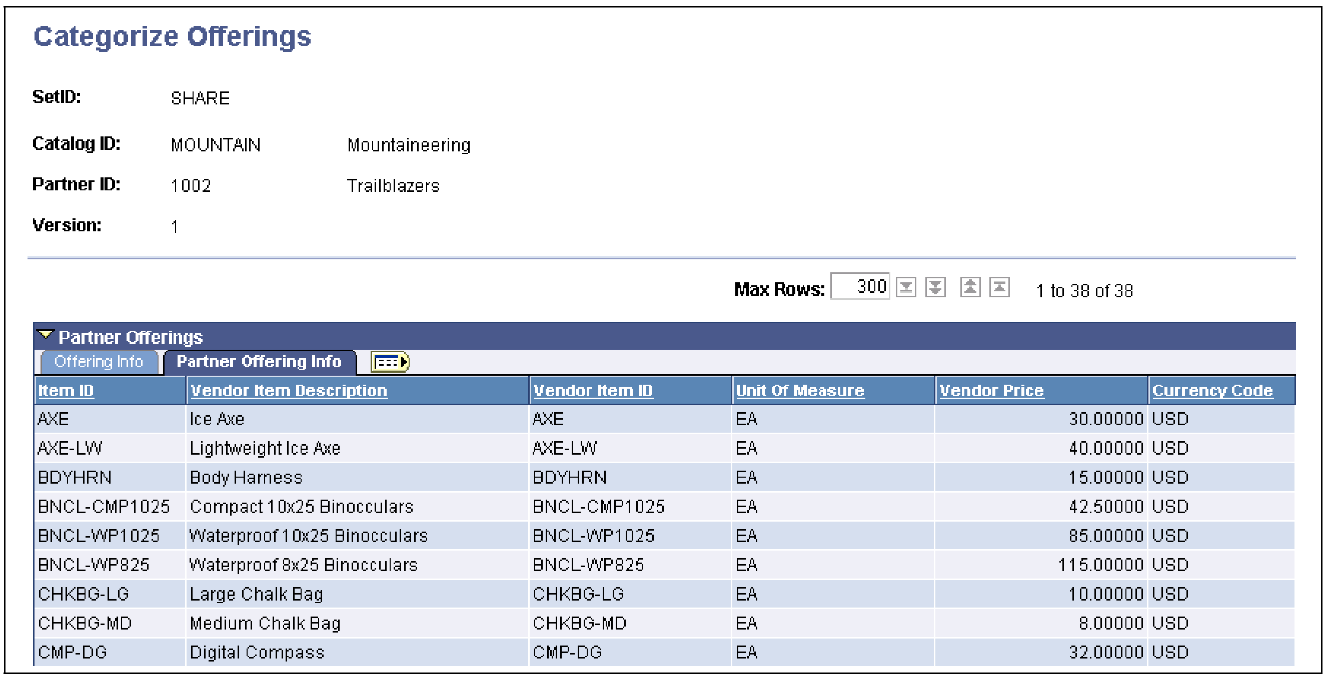
Max Rows (maximum rows) Enter the maximum number of rows, no greater than 300, to display in the grid. Use the arrows to page up, page down, go to end, or go to beginning.

The rows currently in the grid and the total number of rows are also displayed.

Offering ID and **Offering Description** Displays the offering description and ID. If a partner offering is not mapped to a catalog offering ID, the offering ID and offering description fields are blank, and values are assigned during categorization. If they are mapped, then new catalog offerings are created with the mapped offering ID and description, providing no association is found between the partner offering and catalog offerings.

Partner Offering Info Tab

Select the Partner Offering Info tab.



Categorize Offerings

SetID: SHARE

Catalog ID: MOUNTAIN Mountaineering

Partner ID: 1002 Trailblazers

Version: 1

Max Rows: 300 1 to 38 of 38

Partner Offerings

Offering Info | Partner Offering Info

Item ID	Vendor Item Description	Vendor Item ID	Unit Of Measure	Vendor Price	Currency Code
AXE	Ice Axe	AXE	EA	30.00000	USD
AXE-LW	Lightweight Ice Axe	AXE-LW	EA	40.00000	USD
BDYHRN	Body Harness	BDYHRN	EA	15.00000	USD
BNCL-CMP1025	Compact 10x25 Binoculars	BNCL-CMP1025	EA	42.50000	USD
BNCL-WP1025	Waterproof 10x25 Binoculars	BNCL-WP1025	EA	85.00000	USD
BNCL-WP825	Waterproof 8x25 Binoculars	BNCL-WP825	EA	115.00000	USD
CHKBG-LG	Large Chalk Bag	CHKBG-LG	EA	10.00000	USD
CHKBG-MD	Medium Chalk Bag	CHKBG-MD	EA	8.00000	USD
CMP-DG	Digital Compass	CMP-DG	EA	32.00000	USD

Categorize Offerings page: Partner Offering Info tab

Partner offerings are listed using the field names based on the catalog type. Additional fields reflecting the status of the offerings are described below.

Verify that all offerings listed in the source file are listed here, and that the mapping of the original data is correct.

Note. The total number of offerings is displayed above the grid. For example, 1 to 300 of 3000.

Offering Status Offering status can be one of these options:

- *Loaded:* Run Catalog Map process (EOCM_RUN_MAP) has been performed, and offerings are ready to be categorized.
- *Categorized:* The categorization process has been run.
- *Staged:* The selected partner's offerings have been consolidated with the offerings from the enterprise's other partners.

Offering State

New: This offering has never been offered by this partner.

Updated: This offering already exists for this partner, but the data has changed.

Unchanged: There is no change to this offering compared to when it was loaded in a prior version.

Deleted: This offering was included in a prior load, but is marked as *Inactive* in the current load.

Message Text

Blank until categorization is run.

Run Categorization

Click to run the categorization.

A process request is submitted. Click the Process Monitor link to monitor the status of the request.

Note. If the offering status of the selected partner's offerings version is either *Staged* or *Production* the Run Categorization button is not displayed.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler.

Reviewing Categorization Results

This section discusses how to:

- Review categorization results.
- Update partner offering details.
- Update proposed offering categories.
- Update catalog offering categories.
- Choose partner offering categories.
- Revalidate partner offerings.

Important! Changes made to partner offerings should also be made in the partner's catalog source file. This prevents the same errors, rejections, and so forth from occurring again.

Common Elements Used in This Section

Offering ID

The enterprise catalog's offering ID for the selected offering. The offering description is displayed to the right.

Primary Category	Select the check box associated with the category that you want as the primary category. If only one category exists, the check box is automatically selected.

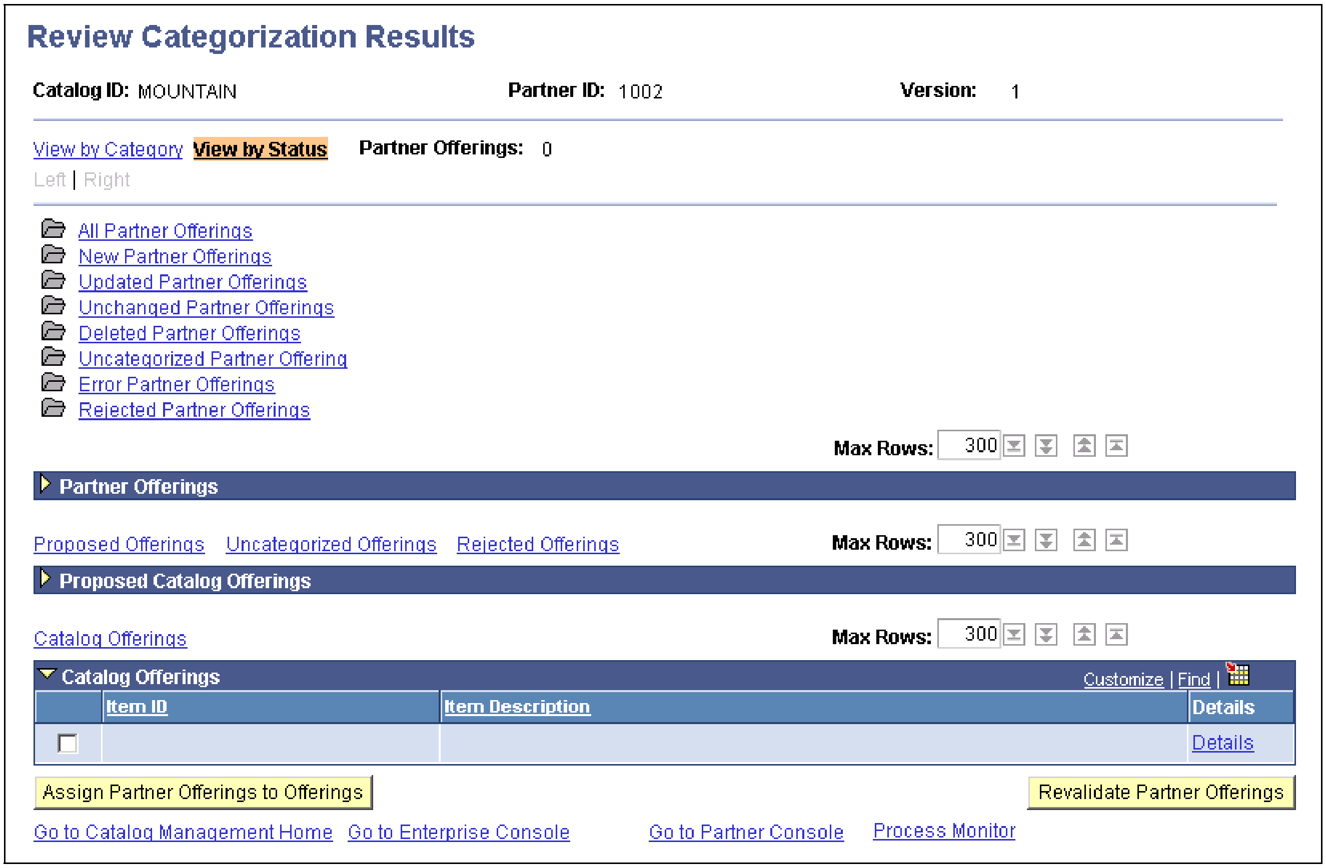
Note. For procurement catalogs, the primary category is the category used with Supply Chain Management.

Pages Used to Review Categorization Results

Page Name	Object Name	Navigation	Usage
Review Categorization Results	EOCM_REPAIR2	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Review Categorization Results	Review and update offerings and their associated categories.
Partner Offering Detail	EOM_GENDTL_SEC	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Review Categorization Results Select Partner Offerings.	Manually update the partner offering detail record.
Proposed Offering Details	EOCM_NEWOFF_DTLS	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Review Categorization Results Select Proposed Offerings	Assign proposed new offerings to categories.
Catalog Offering Details	EOCM_OFFER_DTLS	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Review Categorization Results Select Catalog Offerings.	Assign catalog offerings to categories.
Choose Category	EOCM_CHOOSECAT	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Review Categorization Results Click Assign Offerings to Category.	Assign proposed new catalog offerings to categories using the category hierarchy tree.

Reviewing Categorization Results

Access the Review Categorization Results page.



Review Categorization Results: View by Status page

View By Status

Click View by Status link to display status types as links. When you select a status, the number of partner offerings associated with that status appears to the right of the View by Status link.

The following table lists the different status types and the action that can be taken:

Status	Description	Action
All	Shows all partner offerings.	Review categorization summary results.
New	*Incremental Load:* Offerings that are new for this partner. *Full Load:* Previous load version is overwritten so all offerings will be considered new.	Review the category and catalog offering association. Associate partner offerings to existing catalog offerings as necessary.
Updated	Offerings that have been changed since the previous load version.	Review partner offering updates and associations.

Status	Description	Action
Unchanged	Offerings that have no changes between this load and the previous load version.	Review partner offerings associations.
Deleted	Offerings that are marked *Inactive* in the current load, but existed in a previous load version.	Verify that these partner offerings are no longer offered.
Uncategorized	Offerings with no category assigned.	Assign partner offerings to existing catalog categories.
Error	Offerings that contain errors.	Determine and correct errors.
Rejected	Proposed catalog offerings that were rejected during the approval process.	Reassign partner offerings to existing catalog offerings.

The following three grids are displayed in a collapsed state below the status links. Only the partner offerings associated with the selected status appear in the grids:

- Partner Offerings.
- Proposed Offerings.
- Catalog Offerings.

View By Status: Partner Offerings Grid

The Partner Offerings grid contains information about the partner offerings after categorization. The Offering Info section includes a Detail link for each partner offering listed. This link is used to update offering information.

To assign one or more partner offerings to a proposed or enterprise catalog offering:

1. Select the check box for each partner offering to assign.
2. Go to either the Catalog Offerings grid or the Proposed Offerings grid and select the check box associated with the catalog offering to associate to the selected partner offerings.

   Note. To prevent the selection of more than one catalog offering, the check boxes associated with the remaining catalog offerings are inactive.

3. Click the Assign Partner Offerings to Offerings button.

   Note. Refresh the page to view assignments.

You can also review the message text generated by the categorization process for all partner offerings. The following table lists the messages that can be generated:

Message Text	Description
Partner Offering Found.	Matches the existing partner offering.
Catalog Offering Found.	Matches the catalog offering.
Catalog Offering Name/Partner Offering Name Missing.	Error: Catalog and partner offering names are required.
Category Found	Partner offering category matches the catalog category.
New Offering/Category	Either the partner offering, the category it's assigned to, or both, do not exist in the enterprise catalog. **Note.** Although an offering may be new for this partner, it still exists in the enterprise catalog if it is offered by another partner.
Duplicate Offering ID/Unit of Measure/EFFDT	Error: Duplicate partner offerings in this load.
No Offering ID	Error: Catalog offering ID is missing.
Duplicate Offering ID	Error: Duplicate Catalog offering ID.

View By Status: Proposed Catalog Offerings Grid

The Proposed Catalog Offerings grid is not populated until a status is selected and one of these links, located above the title bar, is selected:

- Proposed Offerings.

  The grid is populated with proposed catalog offerings that currently do not exist in the catalog for the selected status. For example, no other partner offers this offering.

  For each offering listed, the system automatically generates an offering ID and copies the vendor description to the offering description.

- Uncategorized Offerings.

  The grid is populated with proposed catalog offerings that have no category provided.

  Click the Detail link associated with each proposed catalog offering to access the Proposed Offering Details page and assign a category.

- Rejected Offerings.

  The grid is populated with proposed new catalog offerings that were rejected during the approval process.

  Move the associated partner offerings to catalog offerings.

Note. When the Stage Partner Offerings (EOCM_STAGE) process is run, only approved partner offerings are staged.

View By Status: Catalog Offerings Grid

The Catalog Offerings grid is not populated until a status is selected and the Catalog Offerings link, located above the title bar, is selected. The grid is populated with all catalog offerings currently in the catalog.

Click the Detail link associated with each catalog offering to access the Catalog Offering Details page and review or remove assigned categories, and assign additional categories.

Results By Category

Access the Review Categorization Results page. Click the View by Category link.

View categorization results by category to verify if partner offerings have been assigned to the correct categories. As each category within a group is highlighted, the number of partner offerings, catalog offerings, and proposed catalog offerings contained in that category are displayed to the right. You can use the Find Category feature to search for a specific category within the hierarchy.

See Chapter 4, “Setting Up PeopleSoft Catalog Management,” Creating Category Hierarchies, page 19.

You can review offerings by these groups:

- Catalog categories.

  Use the folder icons to navigate through the enterprise catalog’s category hierarchy. The number of offerings contained in each category appears as the category is selected.

  Note. Only the number of offerings contained in the highlighted category are counted. For instance, the number of offerings displayed for a parent category does not include the number contained in its child categories.

- Proposed categories.

  Review offerings that are assigned categories that do not exist in the enterprise catalog and are proposed to be included.

- Unknown category.

  Review all offerings that have no category assigned.

- Rejected categories.

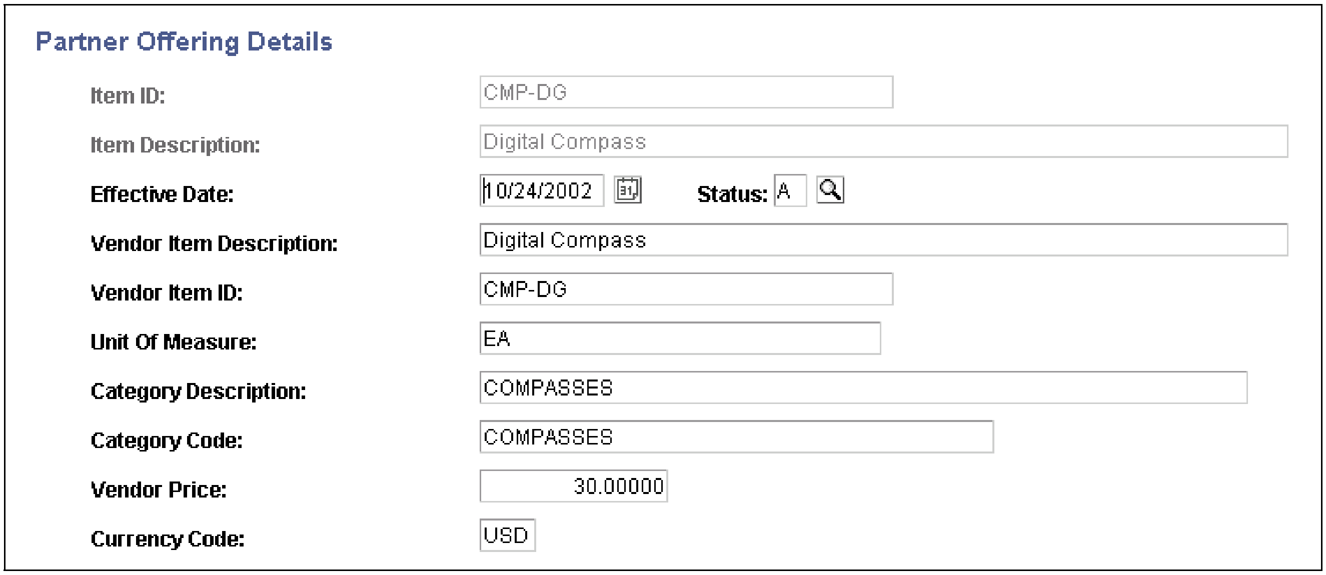
  Review offerings that are assigned to categories that were rejected during the approval process.

See Also

Chapter 8, “Categorizing Offering Data,” Categorizing Partner Offering Data, page 69

Updating Partner Offering Details

Access the Partner Offering Details page.



Partner Offering Details page

Update detail information for the selected partner offering. All field values, except the offering ID and description, can be updated.

The fields that appear are based on the enterprise catalog type.

Click OK to save changes and return to the Review Categorization Results page.

Note. Remember to update the partner source file with any changes made to offering detail information.

Updating Proposed Offering Categories

Access the Proposed Offering Details page.

This page is used to:

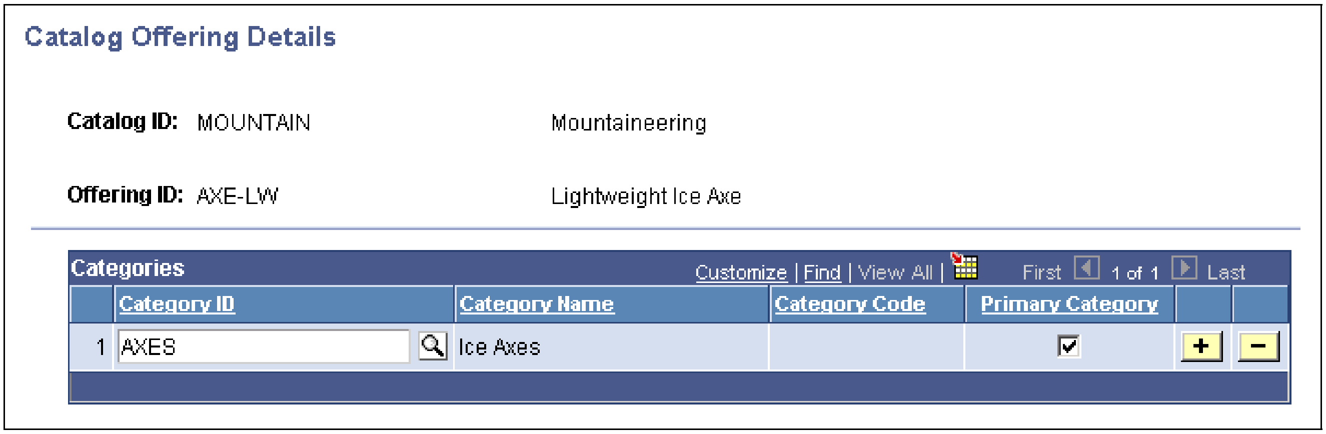
- Propose a new category.
- Remove a proposed new category and assign an existing category.
- Add additional categories.
- Change the primary category.

Category ID, Category Name and **Category Code**: Displays one or more of these options:

- Category information of a proposed new category.
- Category information of a matched enterprise catalog category.
- No information.

Updating Catalog Offering Categories

Access the Catalog Offering Details page.

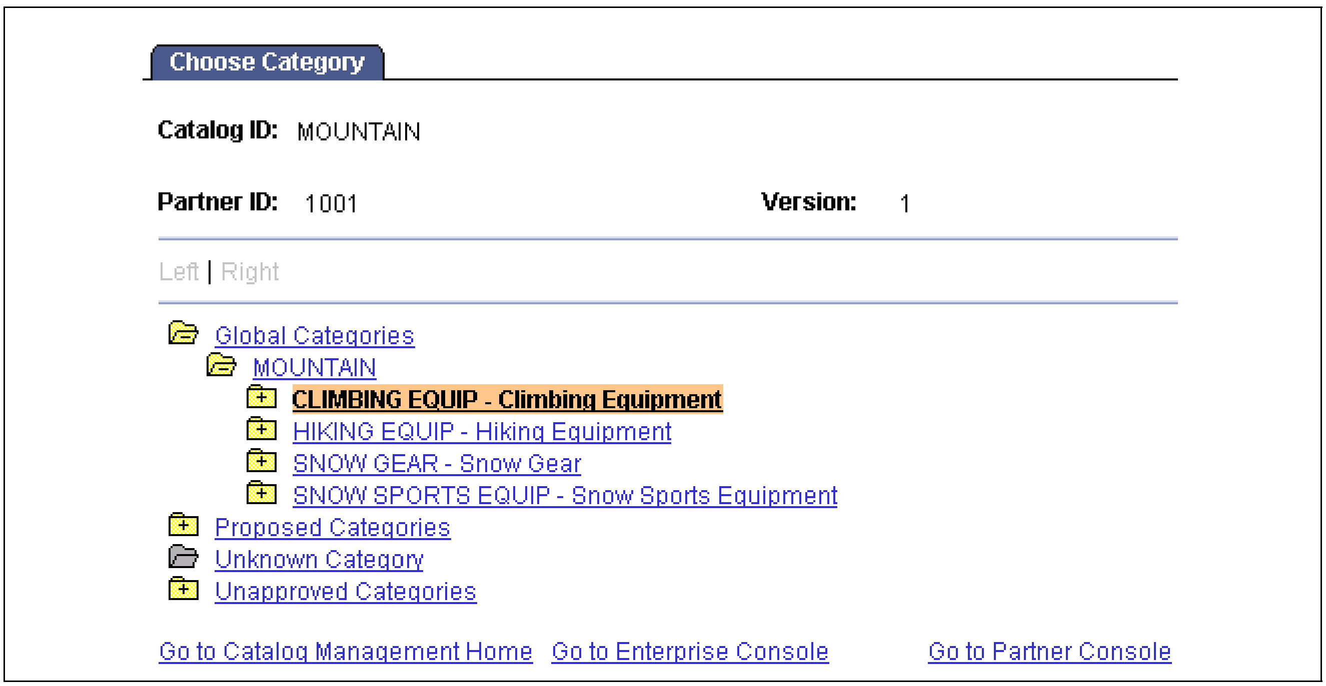


Catalog Offering Details page

Associate an existing catalog category with the selected catalog offering.

Choosing Partner Offering Categories

Access the Choose Category page.



Choose Category page

Select the appropriate category group and navigate to the category you want to assign to the selected offering. Click OK.

Revalidating Partner Offerings

When you revalidate partner offerings, you run the validation (EOCM_REVALID) process to detect any errors that may have resulted from updating partner data. Review the initial categorization results completely before revalidating.

Once you have completed the review and all the required adjustments are made, click Revalidate Partner Offerings. A process request is submitted. Click the Process Monitor link to monitor the status of the request. When it has the process has completed successfully, return to the Review Categorization Results page to once again review results. When you are satisfied, the partner offerings are ready for approval.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler.

Approving Categorization Results

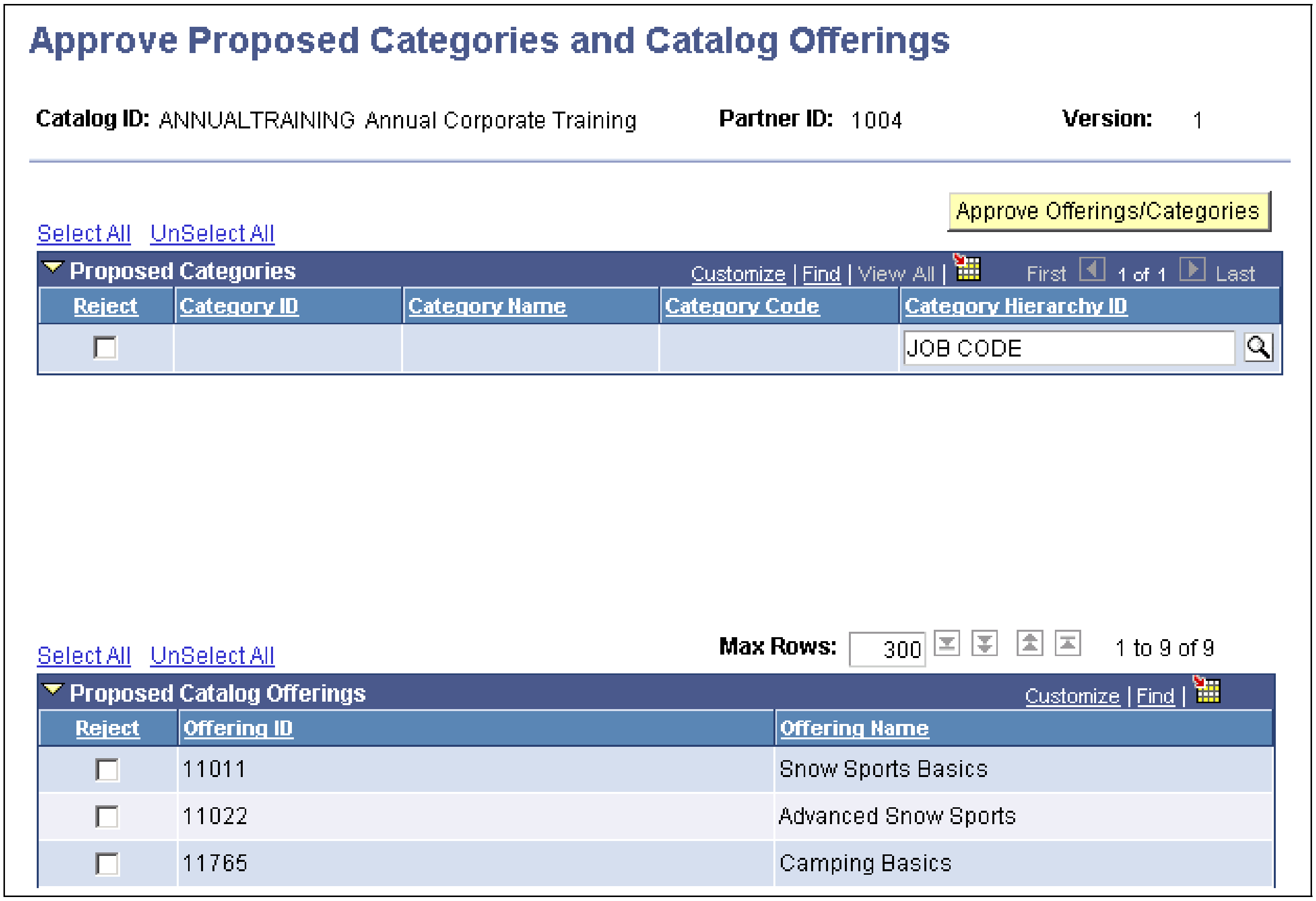
The enterprise catalog manager is responsible for approving, or rejecting proposed categories and proposed catalog offerings based on categorization results.

Pages Used to Approve Categorization Results

Page Name	Object Name	Navigation	Usage
Approve Proposed Categories and Catalog Offerings	EOCM_APPROVE	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Approve Proposed Categories and Catalog Offerings	Approve (or reject) proposed categories and catalog offerings.

Approving Proposed Categories and Catalog Offerings

Access the Approve Proposed Categories and Catalog Offerings page.



Approve Proposed Categories and Catalog Offerings page

Approve Offerings/Categories

Click to approve all new categories and catalog offerings that are not marked for rejection.

A process request is submitted. Click the Process Monitor link to monitor its status. Once it has completed successfully, you can return to the Approval page. Only the categories and catalog offerings that were initially rejected are listed.

Proposed Categories

Category Hierarchy

Select a hierarchy.

The category is added to the root level of the category hierarchy.

Note. If no hierarchy is selected, the category will be approved, but will not appear on any hierarchy.

Reject

Select to reject a category. Rejected categories do not become part of the enterprise category hierarchy. You cannot browse associated partner offerings by this category.

Proposed Catalog Offerings

Lists all the proposed new catalog offerings.

Select the Reject check box located to the left of each catalog offering to reject. Rejected catalog offerings and associated partner offerings are not in the current enterprise catalog. To include partner offerings, they need to be assigned to existing enterprise catalog offerings.

CHAPTER 9

Staging and Browsing Partner Offerings

This chapter provides and overview of browsing and selecting partner offerings and discusses how to:

- Stage partner offerings.
- Browse staged offerings.

Staging Partner Offerings

The staging process indicates that a partner's offerings and associated categories have been approved by the enterprise catalog manager and are ready to be included in the current version of the enterprise catalog. The staging process consolidates selected partner offerings with the offerings from the enterprise's other partners.

Page Used to Stage Partner Offerings

Page Name	Object Name	Navigation	Usage
Stage Partner Offerings	EOCM_LOAD_NEW	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Stage Partner Offerings	Consolidate partner offerings and indicate that they are ready to be included in the enterprise catalog.

Staging Partner Offerings

Access the Stage Partner Offerings page.

Stage Partner Offerings page

Click Stage Partner Offerings to run the staging process.

A process request is submitted. Click the Process Monitor link to monitor the status of the request.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler.

Browsing Staged Offerings

This section discusses how to:

- Browse staged partner offerings.
- Browse staged partner offerings by hierarchy.
- Browse staged enterprise catalog offerings.
- Browse staged enterprise catalog offerings by hierarchy.

Note. The field names and information regarding selected catalogs and offerings displayed on the browse pages vary based on the catalog type.

When you browse partner offerings, you only see offerings for an individual partner and partners will only see their own. When you browse enterprise catalog offerings, you see a consolidated view of all partner offerings. Information on these pages is read-only.

Note. All partner users can browse their own partner offerings. However, partners must be granted privileges to browse enterprise catalog offerings.

See Also

Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Partners and Granting Privileges, page 31

Pages Used to Browse Staged Offerings

Page Name	Object Name	Navigation	Usage
Browse Staged Partner Offerings	EOCM_BRWSE_P_STG	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a staged version of a partner catalog. Browse Staged Partner Offerings	Browse staged offerings for the selected partner.
Partner Offering Pricing	EOCM_SOFF_SEC	Click the Offering Prices link on the Browse Staged Partner Offerings page.	View pricing for the selected partner offering.
Partner Offering	EOCM_BRWSDTL_S_SEC	Click the Offering Details link on the Browse Staged Partner Offerings page.	Browse detailed information for the selected partner offering.
Browse Staged Partner Offerings by Hierarchy	EOCM_BROWSEC_TP	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a staged version of a partner catalog. Browse Staged Partner Offerings by Hierarchy	Browse the staged version of the selected partner's offerings by category hierarchy.
Browse Staged Enterprise Catalog by Offering	EOCM_BROWSE_PROD_S	Catalog Management, Catalog Management Home Select an enterprise catalog. Browse Staged Enterprise Catalog by Offering	Browse the staged version of the selected enterprise catalog offerings.
Browse Staged Enterprise Catalog by Hierarchy	EOCM_BROWSE_CAT	Catalog Management, Catalog Management Home Select an enterprise catalog. Browse Staged Enterprise Catalog by Hierarchy	Browse the staged version of the selected enterprise catalog offerings by category hierarchy.

Browsing Staged Partner Offerings

Access the Browse Staged Partner Offering page.

Browse Staged Partner Offering

Select the Offering Prices button for further information on that partner's offering, including pricing and Unit of Measure.

Catalog ID: MOUNTAIN Mountaineering Catalog Version: 2

Partner ID: 1001 Camper's Warehouse

Item ID: CMP-DG

Item Description: Digital Compass

Categories for this Offering. Customize | Find | View All | First 1 of 1

	Category ID	Category Name
1	COMPASSES	Compasses

Partner listings for this Offering. Customize | Find | View All | First 1 of 1 Last

Partner ID	Name	Vendor Item Description	Effective Date	Status	Offering Prices	Offering Details
1001	Camper's Warehouse	Digital Compass	10/24/2002	Active	Offering Prices	Offering Details

Go to Catalog Management Home Go to Enterprise Console Go to Partner Console

Browse Staged Partner Offering page

Categories for This Offering

This grid lists categories assigned to the selected partner offering.

Partner Listings for This Offering

This grid displays information for each partner that offers this product or service.

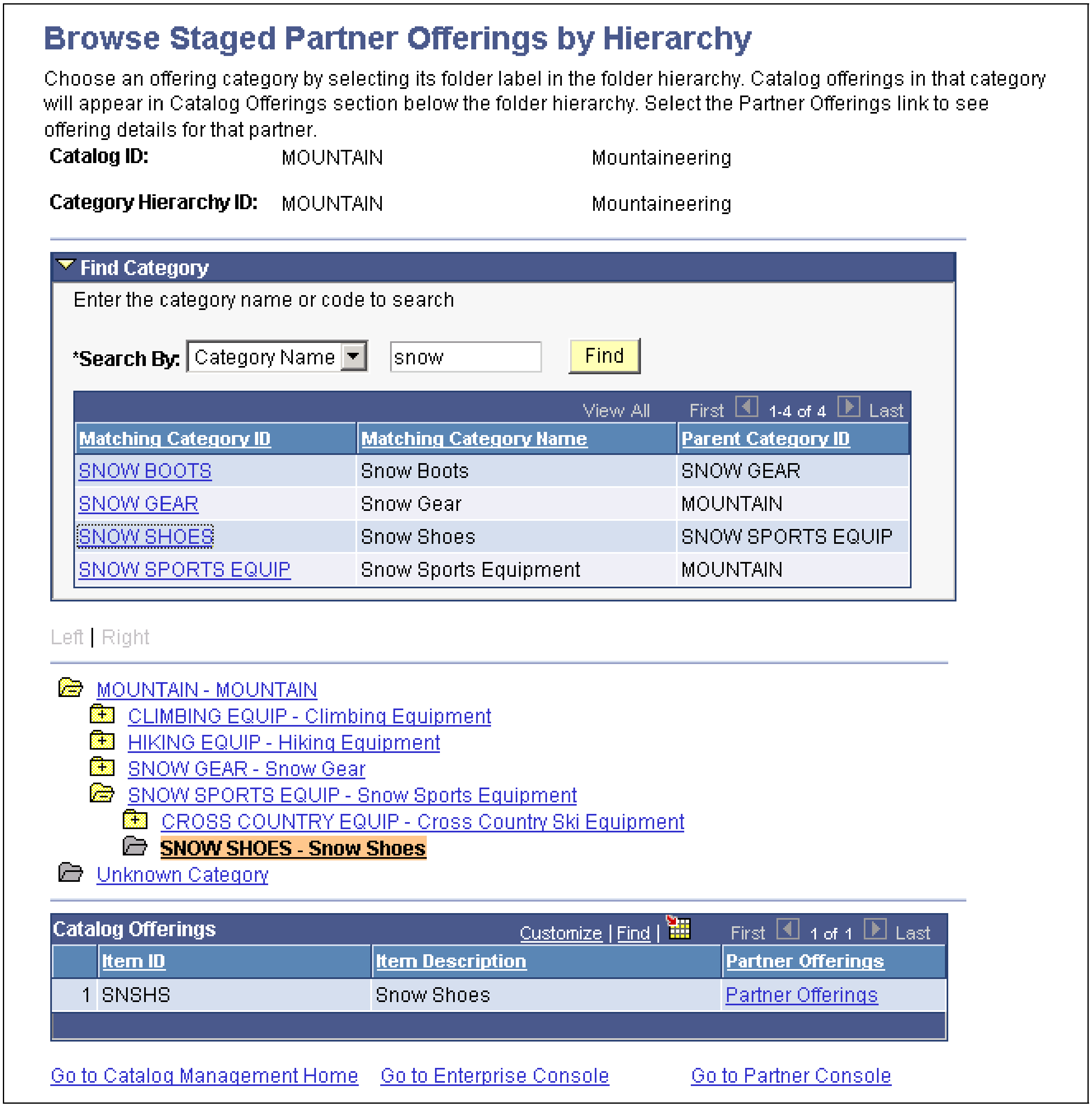
Offering Prices	Click to access the Partner Offering Pricing page and view pricing information for this offering.
Offering Details	Click to access the Partner Offering Detail page and view details for the selected offering.

Note. The URL field located on the Partner Offering Detail page contains the URL address from the partner source data file. Click Open to link to the URL address in a new browser window. To view attachments in a new browser window go to the Attachments grid and click the View File button associated with the desired attachment

Edit Offering	Click to access the Maintain Partner Data page and manually update offering details.

Browsing Staged Partner Offerings by Hierarchy

Access the Browse Staged Partner Offerings by Hierarchy page.



Browse Staged Partner Offerings by Hierarchy page

Use the Find Category feature to locate a specific category, or use the folder icons to navigate through the selected hierarchy. Catalog offerings in a selected category appear in the grid below.

Catalog Hierarchy ID Value reflects the hierarchy selected on the search page. The name of the hierarchy is displayed to the right.

Partner Offerings Click to access the Browse Staged Partner Offering page and view detail information for the selected offering.

Browsing Staged Enterprise Catalog by Offering

Access the Browse Staged Enterprise Catalog by Offering page.

This page is essentially the same as the Browse Staged Partner Offering page.

See Chapter 9, "Staging and Browsing Partner Offerings," Browsing Staged Partner Offerings, page 85.

Browsing Staged Enterprise Catalog Offerings by Hierarchy

Access the Browse Enterprise Catalog Offerings by Hierarchy page.

This page is essentially the same as the Browse Staged Partner Offerings by Hierarchy page.

See Chapter 9, "Staging and Browsing Partner Offerings," Browsing Staged Partner Offerings by Hierarchy, page 86.

CHAPTER 10

Producing and Syndicating Enterprise Catalogs

This chapter discusses an overview of the catalog versioning process and discusses how to:

- Move catalogs to production.
- Browse production offerings.
- Roll back production catalogs to a previous version.
- Syndicate catalogs.
- Archive and purge catalog data.

Moving Catalogs to Production

This section provides an overview of catalog versioning and discusses how to move catalogs to production status.

Understanding Catalog Versioning

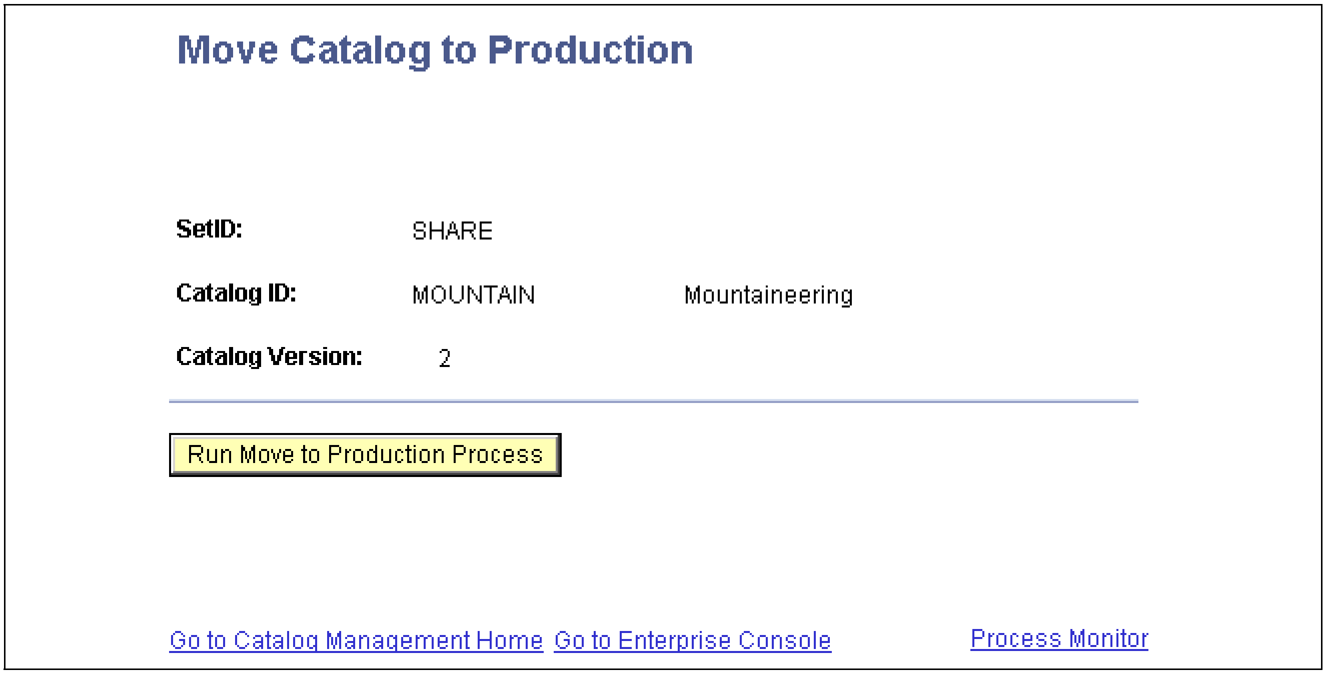
Because Catalog Management maintains multiple versions of catalogs, you can work on a current version without affecting the production version. When a version of the catalog is successfully moved to production, a new catalog version is automatically created by copying the production version and incrementing the catalog version by one. For example, when catalog version two is moved to production, catalog version three is automatically created from version two. When you go to the Catalog Management homepage, version three is listed as the working copy.

Page Used to Move Catalogs to Production

Page Name	Object Name	Navigation	Usage
Move Catalog to Production	EOCM_CATALOG_MTP	Catalog Management, Catalog Management Home Select an enterprise catalog. Move Catalog to Production	Move a catalog to production status.

Moving Catalogs to Production Status

Access the Move Catalog to Production page.



Move Catalog to Production page

Click Run Move to Production Process to move the staged working version of the enterprise catalog to production.

A process request is submitted. Click the Process Monitor link to monitor its status.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler.

Browsing Production Offerings

This section discusses how to:

- Browse production partner offerings.
- Browse production partner offerings by category hierarchy.
- Browse production enterprise catalog offerings.
- Browse production enterprise catalog offerings by category hierarchy.

Note. The field names and information regarding selected catalogs and offerings displayed on the browse pages vary based on the catalog type.

When you browse partner offerings, you only see offerings for an individual partner and partners will only see their own. When you browse enterprise catalog offerings, you see a consolidated view of all partner offerings. Information contained on these pages is read-only.

Note. All partner users can browse their own partner offerings. However, partners need to be granted privileges to browse enterprise catalog offerings and have access to other partners' catalog data.

See Also

Chapter 5, “Creating Enterprise Catalog Definitions,” Assigning Partners and Granting Privileges, page 31

Pages Used to Browse Production Offerings

Page Name	Object Name	Navigation	Usage
Browse Production Enterprise Catalog by Offering	EOCM_BROWSE_PROD	Catalog Management, Catalog Management Home Select an enterprise catalog. Browse Production Enterprise Catalog by Offering	Browse the production version of the selected enterprise catalog by offering.
Browse Production Enterprise Catalog by Hierarchy	EOCM_BROWSECAT_MTP	Catalog Management, Catalog Management Home Select an enterprise catalog. Browse Production Enterprise Catalog by Hierarchy	Browse the production version of the selected enterprise catalog by category hierarchy.
Browse Production Partner Offering	EOCM_BRWSE_TP_PROD	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Browse Production Partner Offering	Browse the selected partner’s offerings within the production version of the selected enterprise catalog.
Browse Production Partner Offerings by Hierarchy	EOCM_BROWSETP_MTP	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Browse Production Partner Offerings by Hierarchy	Browse the selected partner’s offerings within the production version of the enterprise catalog by category hierarchy.
Offering Details	EOCM_BRWSEDTL_SEC	• Click the Offering Details link on the Browse Production Enterprise Catalog by Offering page. • Click the Offering Details link on the Browse Production Partner Offering page.	View offering, pricing, and attachment details for the selected partner offering.

Browsing Production Enterprise Catalog by Offering

Access the Browse Production Enterprise Catalog by Offering page.

This page is essentially similar to the Browse Staged Enterprise Catalog by Offering page.

See Chapter 9, “Staging and Browsing Partner Offerings,” Browsing Staged Partner Offerings, page 85.

Browsing Production Enterprise Catalog Offerings by Hierarchy

Access the Browse Production Enterprise Catalog by Hierarchy page.

This page is essentially similar to the Browse Staged Enterprise Catalog by Hierarchy page.

See Chapter 9, "Staging and Browsing Partner Offerings," Browsing Staged Partner Offerings by Hierarchy, page 86.

Browsing Production Partner Offerings

Access the Browse Production Partner Offering page.

This page is essentially similar to the Browse Staged Partner Offerings page.

See Chapter 9, "Staging and Browsing Partner Offerings," Browsing Staged Partner Offerings, page 85.

Browsing Production Partner Offerings by Hierarchy

Access the Browse Production Partner Offerings by Hierarchy page.

This page is essentially similar to the Browse Staged Partner Offerings by Hierarchy page.

See Chapter 9, "Staging and Browsing Partner Offerings," Browsing Staged Partner Offerings by Hierarchy, page 86.

Rolling Back Catalogs to a Previous Version

This section provides an overview of catalog versioning and rollbacks, and discusses how to roll back to a previous catalog version.

Understanding Catalog Versioning and Rollbacks

You roll back a catalog when there is a problem with the production version. Rollback enables you to replace the current production version with a previous version. The system also creates a new working version. For example:

1. Version four is moved to production.
2. You roll back the catalog to replace version four with version three.
3. Version three becomes the latest production version and is named version five.

   Note. Versions three and four still exist as they were before the rollback.

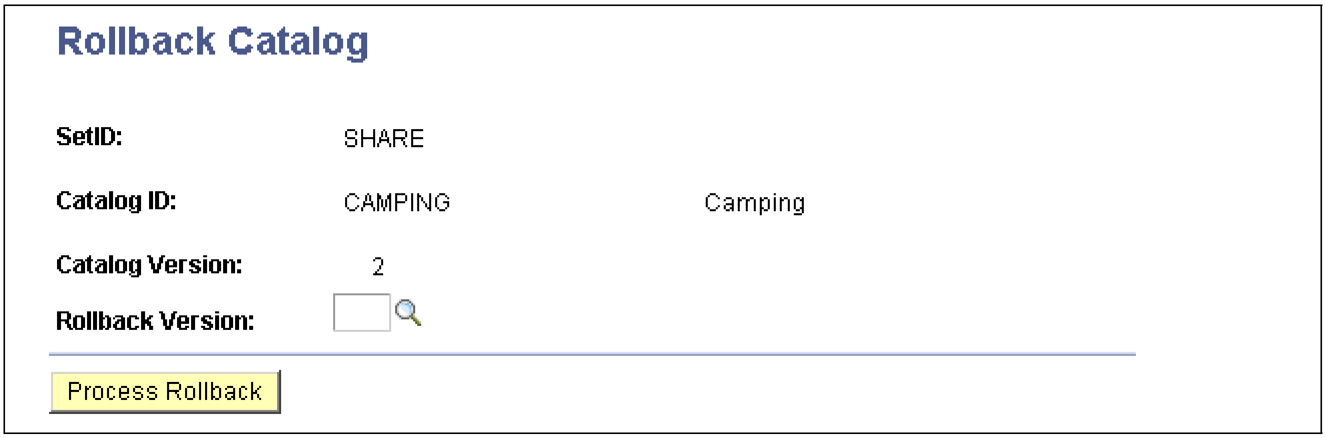
4. A new working version, version six, is created.

Page Used to Roll Back Catalogs to a Previous Version

Page Name	Object Name	Navigation	Usage
Rollback Catalog	EOCM_CATALOG_RB	Catalog Management, Catalog Management Home Select an enterprise catalog. Rollback Catalog	Revert to a previous version of a catalog.

Rolling Back to a Previous Catalog Version

Access the Rollback Catalog page.



Rollback Catalog page

Rollback Version Select the catalog version to roll back to.

Process Rollback Click to run the rollback process. A process request is submitted. Click the Process Monitor link to monitor its status.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler.

Syndicating Catalogs

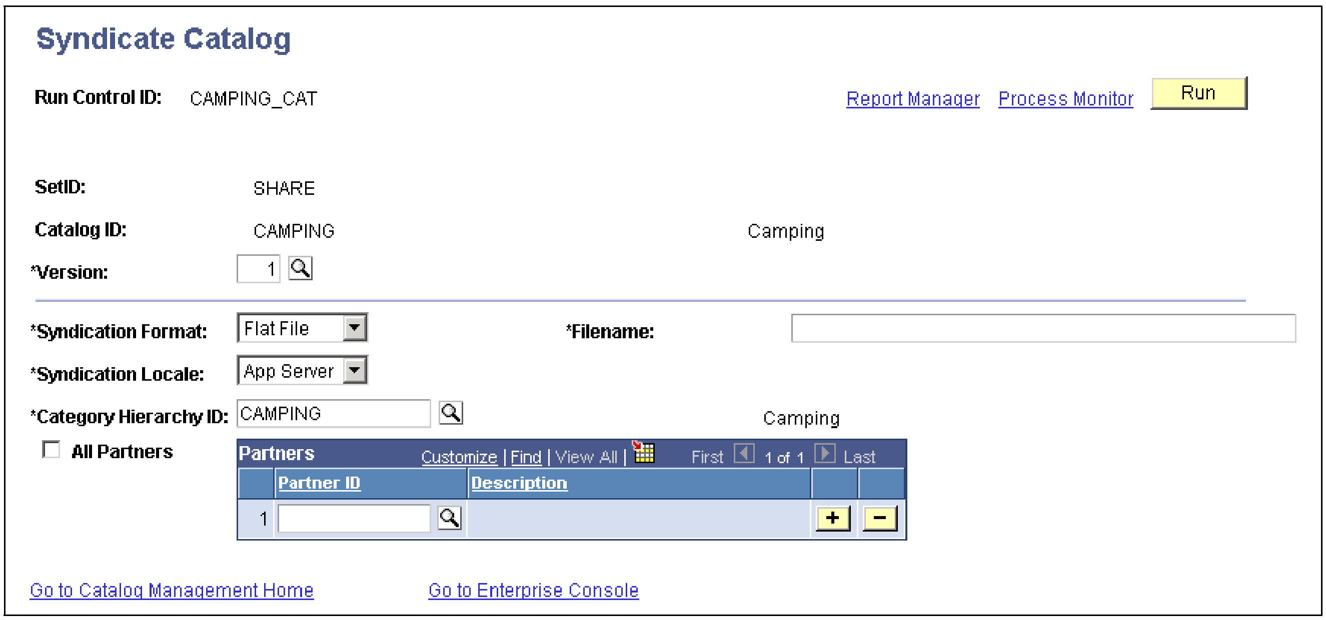
After a catalog has been moved to production, it is ready to be syndicated (distributed) to partners.

Page Used to Syndicate Catalogs

Page Name	Object Name	Navigation	Usage
Syndicate Catalog	EOCM_CTLG_SYND	Catalog Management, Catalog Management Home Select an enterprise catalog. Syndicate Catalog	Distribute the catalog to partners.

Syndicating Catalogs

Access the Syndicate Catalog page.



Syndicate Catalog page

Version Select a production version of this catalog.

Syndication Format Select a format for the syndicated file. Select from *CSV, Flat,* or *xCBL file.*

Note. If flat file is selected, the category hierarchy structure is not included.

Filename Enter a description for the syndicated file.

Syndication Locale Select the distribution location for the file, either *Application Server* or *FTP.*

Category Hierarchy ID Select the category hierarchy to syndicate. The system automatically selects the hierarchy if only a single hierarchy exists for this catalog.

All Partners Select to syndicate all partners' offerings in this catalog.

Partner ID Select partners individually by ID. Only offerings of the selected partners are syndicated.

Run Click to run the syndication process. The process is submitted. Click the Process Monitor link to monitor the status of the process.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler.

Archiving and Purging Catalog Data

This section provides an overview of the archive process and discusses how to:

- Use the archive/purge catalog data feature.
- Archive enterprise catalog data.
- Purge archived data.
- Restore archived data.

Understanding the Archive Process

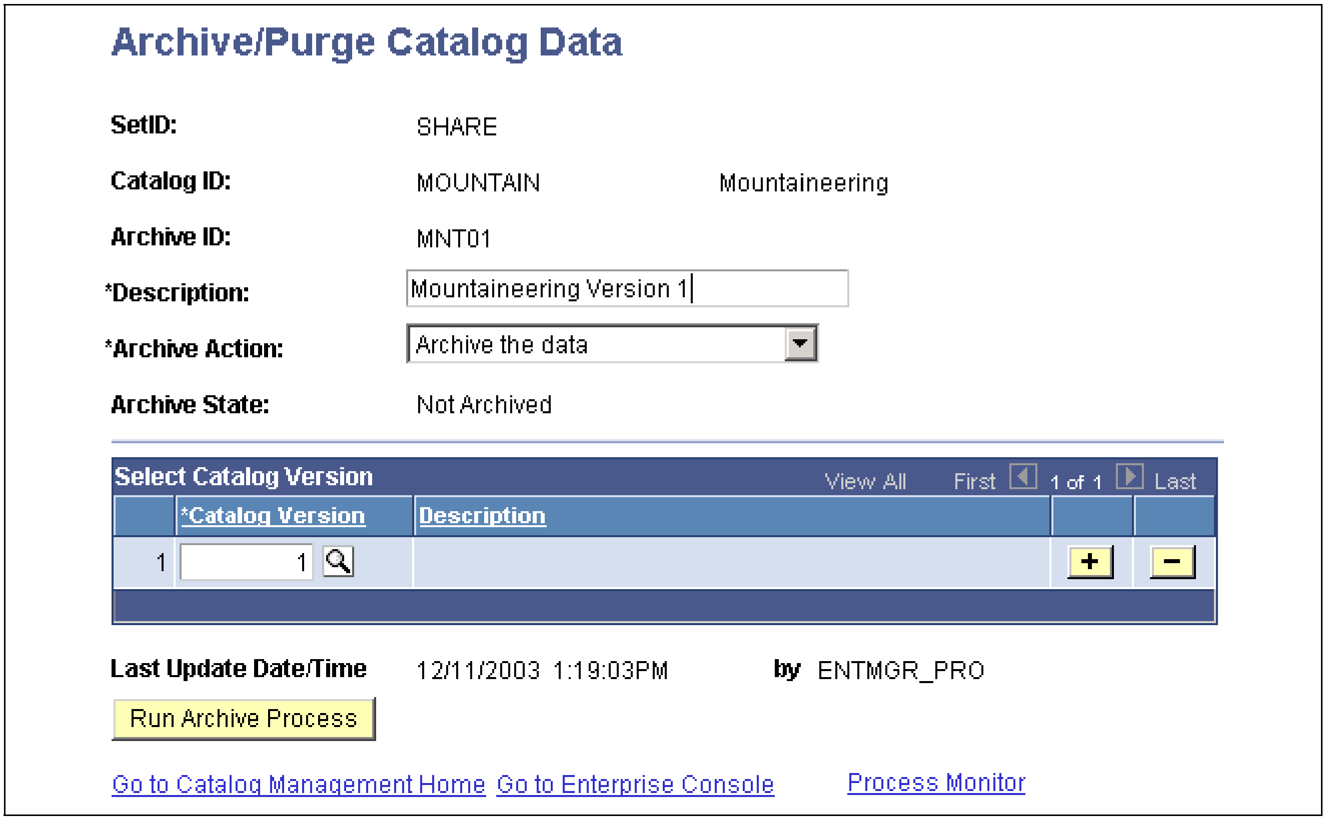
Archiving enterprise catalog data allows catalog managers to manage the volumes of data maintained by Catalog Management by moving enterprise catalog data, that is no longer required, to history files. Removing this historical data from online tables prevents the database from increasing to an unmanageable size, and improves overall performance. The purge feature deletes previously archived data from the system. Once purged, the data cannot be restored.

Page Used to Archive and Purge Catalog Data

Page Name	Object Name	Navigation	Usage
Archive/Purge Catalog Data	EOCM_CTLG_ARCH	Catalog Management, Catalog Management Home. Select an enterprise catalog. Archive/Purge Catalog Data.	Archive enterprise catalog data by catalog version. Purge archived data from the system. Restore archived data to online files.

Using the Archive and Purge Catalog Data Feature

Access the Archive/Purge Catalog Data page.



Archive/Purge Catalog Data page

SetID and **Catalog ID**
Values are based on the enterprise catalog selected on the Catalog Management Home page.

Archive ID
Displays the value entered on the Search page.

Archive Action
Archive action can be one of these options:

Archive the Data: Copies the data from the online tables into the history table, and then removes the data from the online tables. This is the only option available for data that has not been archived.

Purge from Archive: Deletes previously archived data from the history table. Once purged, the data cannot be restored.

Restore from Archive: Moves previously archived data from the history table back to the online tables.

Archive State
Displays the current state of the selected catalog data. States include: *Not Archived, Archived, Purged,* and *Restored.*

Select Catalog Version
Select the catalog versions that you want to archive, purge, or restore. The versions available will be based on the selected action.

Run Archive Process
Select to run the application engine EOCM_ARCH archive process. The process is submitted. Click the Process Monitor link to monitor the status requests.

Note. The archive state will change accordingly when the process has successfully completed.

Archiving Enterprise Catalog Data

The archive feature copies the enterprise catalog data from the online tables into the history table, and then removes the data from the online tables. This is the only option available for data that has not been archived.

To archive enterprise catalog data:

1. Go the Archive/Purge Catalog Data page.

   Select the desired archived enterprise catalog version. The displayed archive state is: *Not Archived.*
2. Select the archive action *Archive the Data.*
3. Click Run Archive Process.

   The application engine EOCM_ARCH process is submitted.
4. Click the Process Monitor link to monitor the status requests.

Note. The archive state will change to *Archived* when the process has successfully completed. The catalog version will no longer be available for selection from Catalog Management.

Purging Archived Data

The purge feature deletes previously archived data from the system. Once purged, the data cannot be restored.

To purge archived data:

1. Go the Archive/Purge Catalog Data page.

   Select the desired archived enterprise catalog version. The displayed archive state is: *Archived.*
2. Select the archive action *Purge from Archive.*
3. Click Run Archive Process.

   The application engine EOCM_ARCH process is submitted.
4. Click the Process Monitor link to monitor the status of requests.

Note. The archive state will change to *Purged* when the process has successfully completed, and the archive action field will be inactive.

Restoring Archived Data

The restore feature moves previously archived data from the history table back to the online tables.

To restore archived data:

1. Go the Archive/Purge Catalog Data page.

   Select the desired archived enterprise catalog version. The displayed archive state is: *Archived.*
2. Select the archive action *Restore from Archive.*
3. Click Run Archive Process.

   The application engine EOCM_ARCH process is submitted.
4. Click the Process Monitor link to monitor the status of requests.

Note. The archive state will change to *Restored* when the process has successfully completed. The catalog version will be available for selection from Catalog Management.

CHAPTER 11

Maintaining Enterprise Catalog and Partner Offerings

This chapter provides an overview of the process to maintain catalog and partner offerings and discusses how to:

- Add or change enterprise catalog data.
- Add or change partner offering data.

Note. Partners can only be granted privileges to access the Maintain Partner Data page.

See Also

Chapter 5, “Creating Enterprise Catalog Definitions,” Assigning Enterprise Managers and Granting Privileges, page 30

Chapter 5, “Creating Enterprise Catalog Definitions,” Assigning Partners and Granting Privileges, page 31

Adding or Changing Enterprise Catalog Data

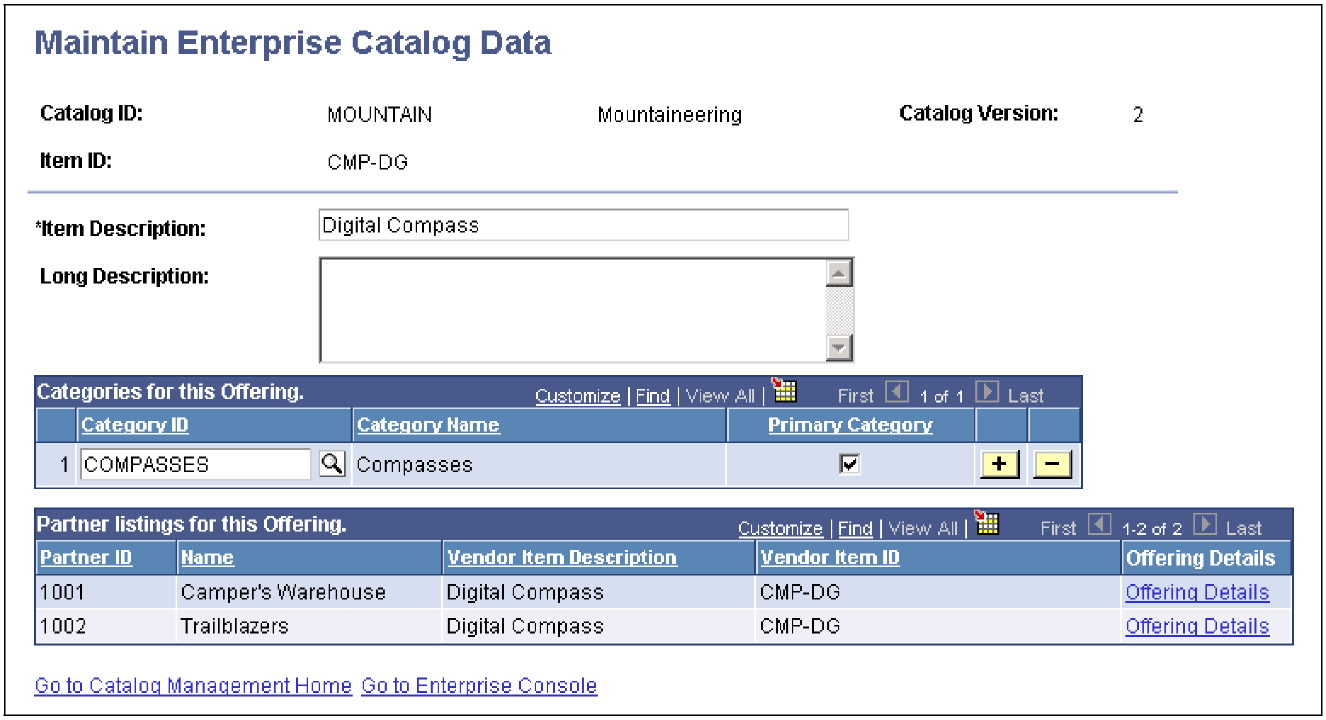
You use the Maintain Enterprise Catalog Data page to manually enter and change data about the enterprise catalog.

Pages Used to Add or Change Enterprise Catalog Data

Page Name	Object Name	Navigation	Usage
Maintain Enterprise Catalog Data	EOCM_ADD_PROD	Catalog Management, Catalog Management Home Select an enterprise catalog Maintain Enterprise Catalog Data	Manually enter and change data about the enterprise catalog and its associated partners’ offerings.
Partner Offering Detail	EOCM_SOFFDTL_SEC	Click the Offering Details link on the Maintain Enterprise Catalog Data page.	Review associated partner offering information.

Maintaining Enterprise Catalog Data

Access the Maintain Enterprise Catalog Data page.



Maintain Enterprise Catalog Data page

You use this page to:

- Add new catalog offerings.
- Modify catalog offering descriptions.
- Add, remove, or change categories.
- Review associated partner offerings.

Note. New catalog offerings are added to the current working version of the enterprise catalog. Any catalog offerings that have been manually added can only be updated when they are either staged or in production.

Category ID	Change the existing category or add a new category.
Primary Category	Select to indicate the offering's primary category. This is the category used for Supply Chain Management.
Offering Details	Click to access the Partner Offering Detail page and view more information about an offering.

Adding or Changing Partner Offering Data

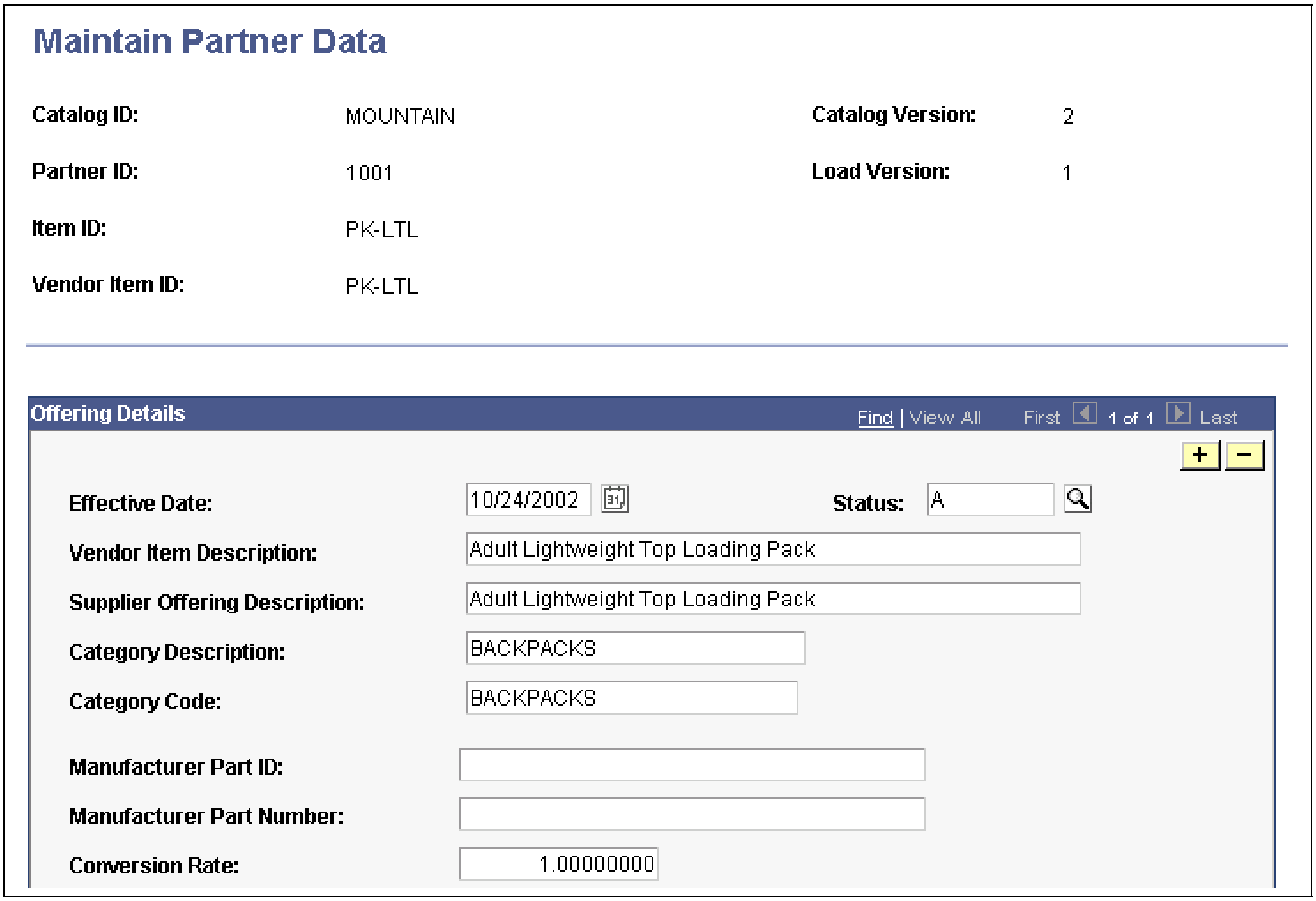
You use the Maintain Partner Offering Data page to manually enter and change data about partner offerings.

Page Used to Add or Change Partner Offering Data

Page Name	Object Name	Navigation	Usage
Maintain Partner Data	EOCM_ADD_TP_PROD	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Maintain Partner Data.	Manually enter and change data about partner offerings.

Maintaining Partner Data

Access the Maintain Partner Data page.



Maintain Partner Data page

Use this page to:

- Add new partner offerings.
- Modify current partner offering detail information.
- Change effective date information for an existing partner offering.

To prevent errors, you should be familiar with the format and the field type for each value you need to update before adding or changing partner offering detail information.

Note. These functions can be performed in any existing version of a partner catalog. The selected version can be in created, loaded, categorized, staged, or production.

A warning message appears when you attempt to save changes to partner offerings that are part of a production enterprise catalog.

Offering Details

The fields here correspond with the catalog map definition for the selected partner source. Modify any field or add more units of measure with associated prices and currency codes. You can also add a new effective-dated record.

CHAPTER 12

Comparing Versions of Partner Catalogs

This chapter provides a list of common elements and discusses how to:

- Generate comparison reports.
- View comparison reports.

Note. This feature is only available for catalog versions where the partner's offering data has already been transformed into the enterprise catalog format and loaded into the enterprise catalog.

Generating Comparison Reports

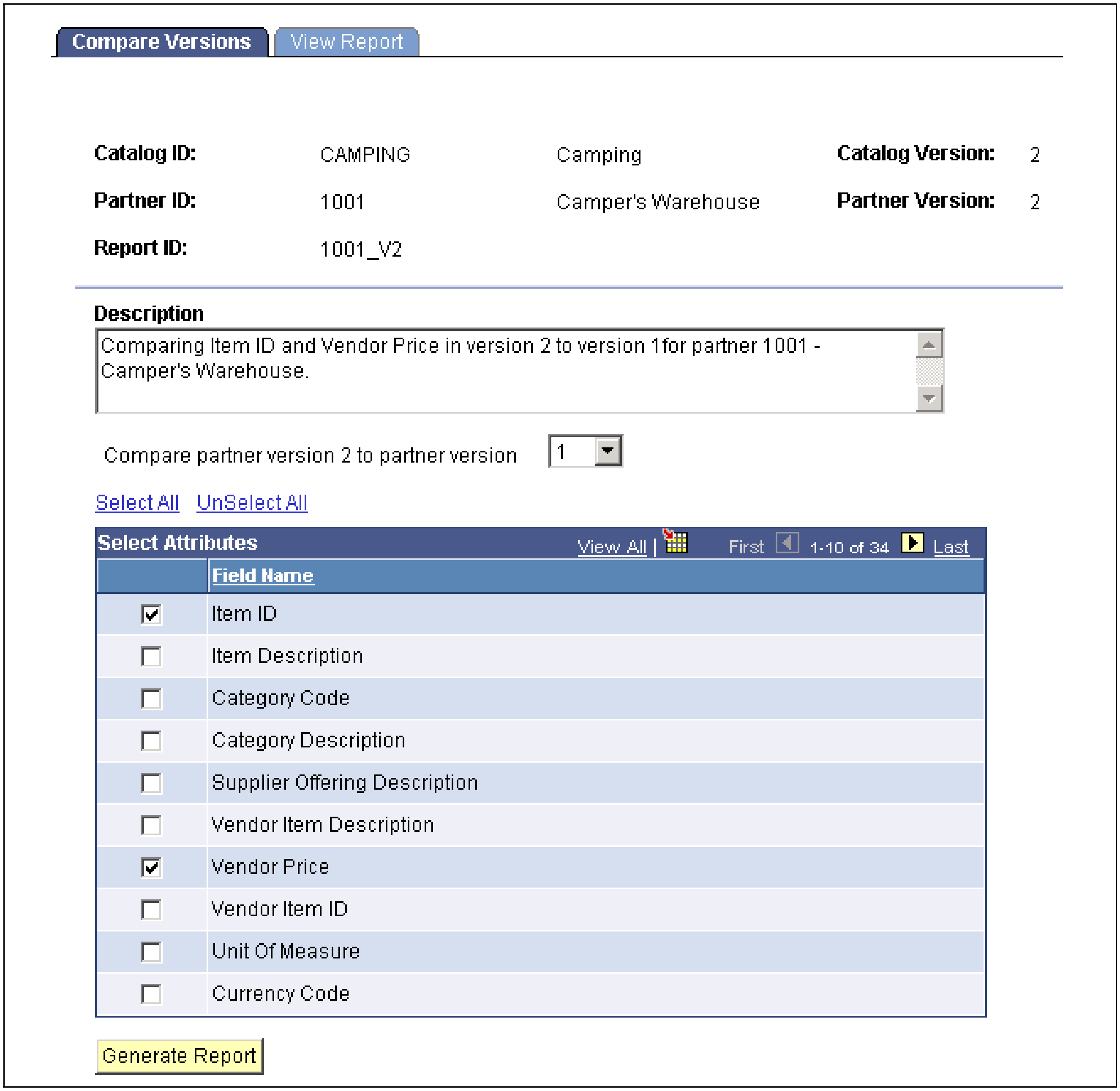
You can compare two versions of a partner catalog.

Page Used to Generate Comparison Reports

Page Name	Object Name	Navigation	Usage
Compare Partner Versions	EOCM_COMPARE_VER	Catalog Management, Catalog Management Home Select an enterprise catalog. Select the newer of the partner catalogs that you want to compare. Compare Versions	Compare two partner catalog versions.

Generating Comparison Reports for Partner Catalogs

Access the Compare Versions page.



Compare Versions page

Compare partner version *n* to partner version

Select the second partner versions to compare.

Note. Only partner versions that are earlier than the version selected on the Enterprise Catalog Console page are available.

Field Name

Select the check boxes associated with attributes that you want to compare. The list of attributes is based on catalog type.

The report includes only those offerings that have differences between the selected versions, considering only the attributes selected.

Note. Avoid selecting all fields for a single report, as this can create many rows and increase report generation time.

Generate Report Click to generate the comparison report. The Process Scheduler Request page is displayed.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler.

Viewing Comparison Reports

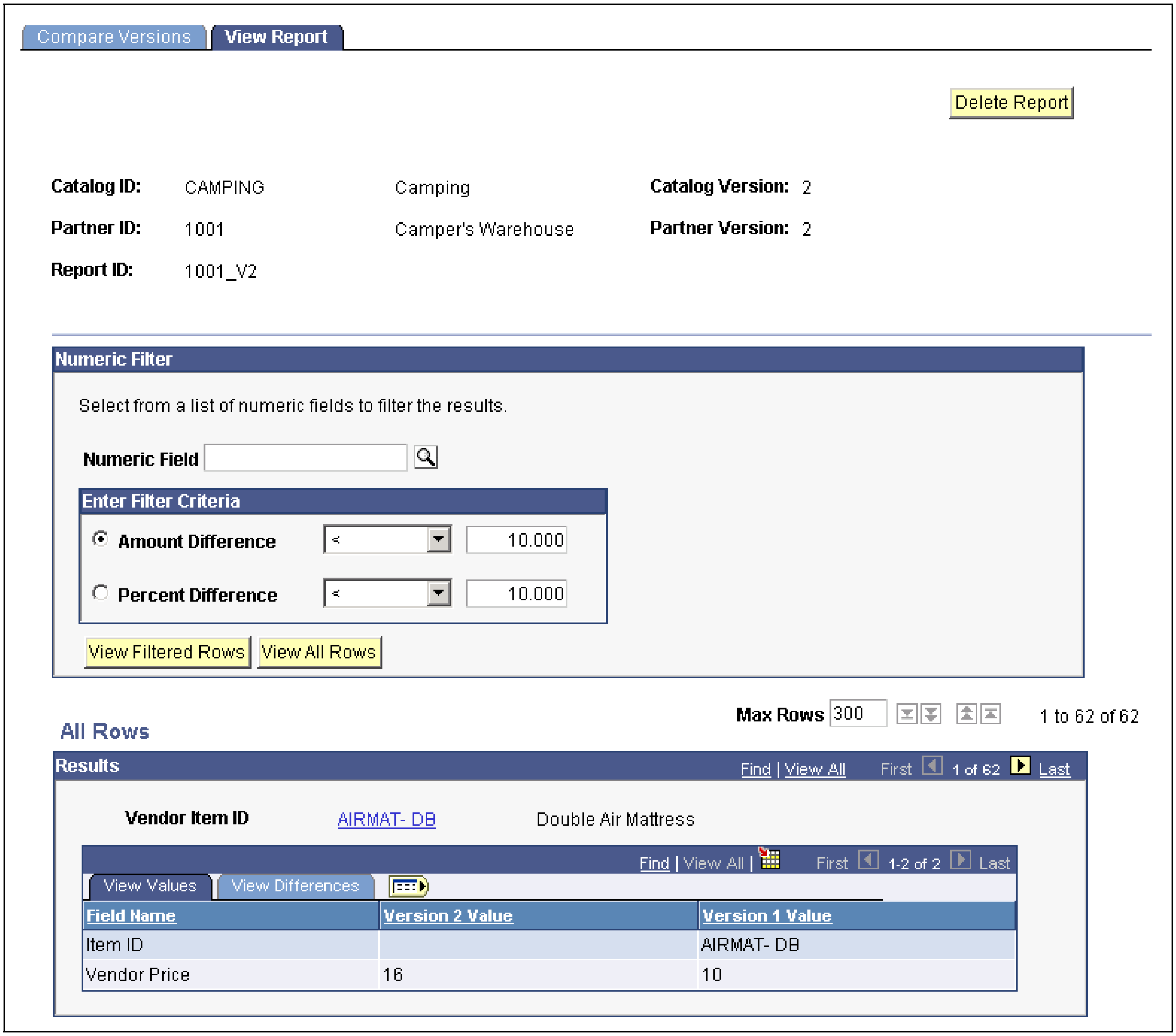
You can filter comparison results to analyze the data most effectively.

Page Used to View Comparison Reports

Page Name	Object Name	Navigation	Usage
View Report	EOCM_VIEW_VERSIONC	Catalog Management, Catalog Management Home Select an enterprise catalog. Select the newer of the partner catalogs that you want to compare. Compare Versions, View Report	View comparison data between two partner catalog versions.

Viewing Comparison Data

Access the View Report page.



View Report page

If you won't need this data again, click Delete Report to remove the report from the system.

Numeric Filter

You can filter comparison results by a selected numeric field based on an amount or percent difference. For example, results can be displayed in the filtered rows view if the vendor price of an offering shows a difference greater than 10.00.

Numeric Field

Select a numeric field. Only numeric fields selected for comparison are available.

Amount Difference and **Percent Difference**

To apply a filter:

1. Select to filter by amount or percent.
2. Select an operator. Choose from:
   - Less than.

- Less than or equal to.
- Equal to.
- Greater than.
- Greater than or equal to.

3. Enter the amount or percent difference to filter by.

Filter Rows Click to view results based on the filter criteria entered.

All Rows Click to remove any previous filtering and view results without filtering.

Results

For each offering in the partner catalog that contains differences, the Results grid displays the fields selected for comparison.

Max Rows Enter the maximum number of rows, no greater than 300, to display in the Results grid.

Vendor Item ID Click the ID to access the Maintain Partner Data page for that offering and update the data.

Note. The Maintain Partner Data information updates the newer version of the catalog. Any updates made are not seen on the comparison report until it has been regenerated.

View Values Tab

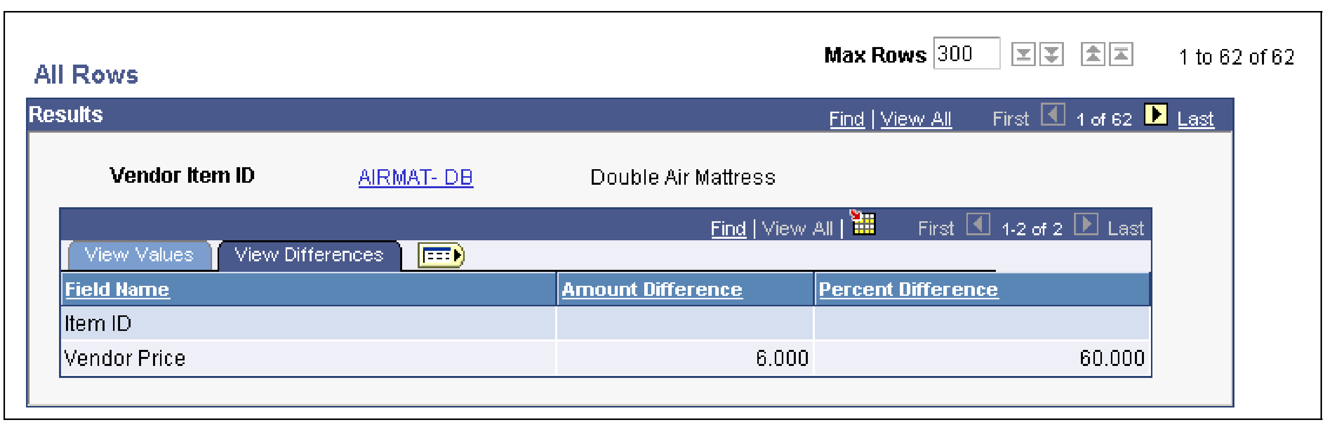
Select the View Values tab.

Version <Newer Catalog Version Number> Value Displays the value found in the newer catalog version for the associated field.

Version <Older Catalog Version Number> Value Displays the value found in a previous catalog version for the associated field.

View Differences Tab

Select the View Differences tab.



View Report page: View Differences tab

Amount Difference	Displays the amount difference from the older version to the newer version, for numeric fields only.
Percent Difference	Displays the percent difference from the previous version to the newer version, for numeric fields only.

See Also

Chapter 11, "Maintaining Enterprise Catalog and Partner Offerings," Maintaining Partner Data, page 101

APPENDIX A

Using Component Interfaces

This appendix discusses using component interfaces to access Catalog Management components.

Using Component Interfaces to Access Components

A component interface is a PeopleTools object created in Application Designer. It allows you to access a PeopleSoft component from another application, a PeopleSoft application engine program, or another external application. The application can simultaneously update a component's underlying data and use its business logic without knowing the details of page structures or component definitions.

The Maintain Catalog Partners and Maintain Categories components, delivered with Catalog Management, use component interfaces to update partner registration and category information, respectively.

Suppose you want to create 500 new categories. You can use PeopleCode to call the EOCM_CATEGORY_CI component interface to load the data more efficiently into the EOCM_CATEGORY table using an excel spreadsheet or another application.

PeopleSoft provides component interfaces for the following areas in Catalog Management:

Component Interface	Description
EOTP_QUICKPARTNER_CI	Maintain Partner Registration
EOCM_CATEGORY_CI	Maintain Categories

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Component Interfaces

APPENDIX B

Setting Security Options For Workflow

This appendix discusses how to:

- Set user profile attributes.
- Set permissions.
- Define role options.
- Update Simple Mail Transfer Protocol (SMTP) settings.

Setting User Profile Attributes

Workflow settings and a valid primary email address must be specified for all Catalog Management users who need to receive notifications.

To specify workflow settings and a primary email address:

1. Select PeopleTools, Security, User Profiles, User Profiles, Workflow.
2. Select Routing Preferences for Worklist User and Email User.
3. Select the General tab.
4. Click the Edit Email Address link.
5. Select the email type, and select the Primary Email Account check box.

   Workflow notification emails will be sent to this email address.

See Also

Enterprise PeopleTools 8.46 PeopleBook: Security Administration.

Setting Permissions

PeopleSoft delivers the EOCM1500 (partner users), and EOCM6500 (enterprise catalog managers) permission lists. These permission lists enable users to perform specific catalog management activities. Permissions are preconfigured as:

- Component interfaces.
- PeopleSoft Query access groups and profiles.

To set the permissions for these permission lists:

1. Select PeopleTools, Security, Permissions & Roles, Permission Lists.
2. Select a permission list.
3. Access the Component Interfaces page.
4. Select *EOCM_CATEGORIZE_CI* and assign full access to all methods.
5. Access the Query page.
6. Make sure that the access group permissions are set to with these options:

   The tree name is *QUERY_TREE_EOCM.*

   The access group is *EOCM_ACCESS_GROUP.*

   The Accessible check box is selected.
7. For the query profile, make sure that the Only allowed to run queries check box is selected.

Note. If you create permission lists for partner users and enterprise catalog managers, you must also perform these steps for those lists.

See Also

Enterprise PeopleTools 8.46 PeopleBook: Security Administration.

Defining Role Options

PeopleSoft delivers predefined workflow roles, including Catalog Partner and Enterprise Catalog Manager, which are assigned to partner and enterprise catalog manager users.

To define role options for workflow:

1. Select PeopleTools, Security, Permissions & Roles, Roles, Workflow.
2. Select the Use Query to Route Workflow check box.
3. Select *EOCM_ROLE_QUERY* for the query name.

Creating a New Enterprise Catalog Manager Role

To associate the Enterprise Catalog Manager role with the workflow step object:

1. Select Application Designer, Activity.
2. Open *EOCM_APPROVE_CAT_OFF.*
3. Right-click and select Approve Offerings WL, Item Properties.
4. In the Worklist Definition window, click the Field Mapping button.
5. In the Field Map window, double-click OPRID to open the Map Field window.
6. Select the role name created for the enterprise catalog manager.
7. Click Specify Bind Variables to open the Specify Query Bin Variables window.

   Verify the *setID* and *EOCM_CATALOG_ID* are listed as bind variables.

Note. If they are not listed, define the role options for workflow.

See Also

Enterprise PeopleTools 8.46 PeopleBook: Security Administration.

Updating SMTP Settings

SMTP settings must be modified to enable email notifications. This task must be performed for the application server and the Process Scheduler server.

See Also

PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler.

APPENDIX C

Setting Automatic Daily Partner Cleanup

This appendix provides an overview of daily partner cleanup and discusses how to initiate automatic daily partner cleanup.

Understanding Daily Partner Cleanup

All partners must be registered and have the required services and users assigned before they can be associated with a catalog in Catalog Management. If a registered partner terminates the partnership, these cleanup operations are performed automatically:

- Assigned services are deleted.
- Assigned users are deleted.
- User profiles are deleted.
- Partner status is changed to *Ended Partnership.*

The Application Engine batch process (EOCM_TRDP_AE) runs at a scheduled time to monitor changes in partner status. If a partner's registration has been terminated, this process sets Catalog Management partner status to *Inactive* and deletes partner users from their associated catalogs.

PeopleSoft delivers a Process Scheduler recurrence schedule, EOCM Daily Partner Cleanup, as an example.

Initiating Automatic Daily Partner Cleanup

This section discusses how to:

- Set the recurrence schedule.
- Set process definition options.
- Initiate the Application Engine process request.

Once the request is initiated, the process runs automatically at the scheduled time without any user intervention.

Setting the Recurrence Schedule

To set the recurrence schedule:

1. Select PeopleTools, Process Scheduler, Recurrences.
2. Open the recurrence titled EOCM Daily Partner Cleanup.

3. Provide parameters for the Recurrence Pattern, Start Request, End Request, and Repeat regions.
4. In the Schedule Next Recurrence when section, select Current Request is Initiated.

Setting Process Definition Options

To define process definition options for the EOCM_TRDP_AE process:

1. Select PeopleTools, Process Scheduler, Processes.
2. Select the EOCM_TRDP_AE process.
3. Access the Process Definition Options page.
4. Enter the following information:

Server Name	Enter a valid Process Scheduler server name.
Recurrence Name	Select *EOCM Daily Partner Cleanup.*
Component	Select *AE_REQUEST.*
Process Groups	Select *EOCMALL.*

Initiating the Application Engine Process Request

To initiate automatic daily partner cleanup:

1. Select PeopleTools, Application Engine, RequestAE.
2. When adding the new run control, select *EOCM_TRDP_AE* for the program name.
3. On the Application Engine Request page, select *Always* in the Process Frequency field.

   This selection automatically runs the process on the defined recurrence schedule.
4. Click Run to initiate the request.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler.

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Application Engine.

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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