

# PeopleSoft®

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## PeopleSoft EnterpriseOne Customer Self Service 8.11 PeopleBook

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**November 2004**

PeopleSoft EnterpriseOne Customer Self Service 8.11 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.

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**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.

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## 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.

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## PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications. 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.

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## 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.

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**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.

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### 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 [peoplesoftpress@mmapartner.com](mailto:peoplesoftpress@mmapartner.com).

**See Also**

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

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## 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
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction

Resource	Navigation
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

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## 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
<b>Bold</b>	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.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.  We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( ).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.  Ampersands also precede all PeopleCode variables.

## 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.

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**Note.** Example of a note.

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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.

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**Important!** Example of an important note.

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### Warnings

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

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**Warning!** Example of a warning.

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### 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.

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## **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](mailto:doc@peoplesoft.com).

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

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## **Common Elements Used in PeopleBooks**

### **Address Book Number**

Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant id, participant number, and so on.

<b>As If Currency Code</b>	Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code allows you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.
<b>Batch Number</b>	Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).
<b>Batch Date</b>	Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.
<b>Batch Status</b>	Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are: <i>Blank</i> : Batch is unposted and pending approval. <i>A</i> : The batch is approved for posting, has no errors and is in balance, but it has not yet been posted. <i>D</i> : The batch posted successfully. <i>E</i> : The batch is in error. You must correct the batch before it can post. <i>P</i> : The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to E. <i>U</i> : The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.
<b>Branch/Plant</b>	Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.
<b>Business Unit</b>	Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.
<b>Category Code</b>	Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.
<b>Company</b>	Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.
<b>Currency Code</b>	Enter the three-character code that represents the currency of the transaction. PeopleSoft EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.
<b>Document Company</b>	Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.  If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

**Document Number**

Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

**Document Type**

Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. PeopleSoft EnterpriseOne reserves these prefixes for the document types indicated:

*P*: Accounts payable documents.

*R*: Accounts receivable documents.

*T*: Time and pay documents.

*I*: Inventory documents.

*O*: Purchase order documents.

*S*: Sales order documents.

**Effective Date**

Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

**Fiscal Period and Fiscal Year**

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

**G/L Date** (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

# PeopleSoft EnterpriseOne Customer Self Service Preface

This preface discusses:

- PeopleSoft products
- PeopleSoft application fundamentals

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## PeopleSoft Products

This PeopleBook refers to these PeopleSoft products:

- PeopleSoft EnterpriseOne Sales Order Management
- PeopleSoft EnterpriseOne Inventory Management
- PeopleSoft EnterpriseOne Transportation Management
- PeopleSoft EnterpriseOne Forecast Management
- PeopleSoft EnterpriseOne Service Management
- PeopleSoft EnterpriseOne Case Management
- PeopleSoft EnterpriseOne Solution Advisor

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## PeopleSoft Application Fundamentals

Additional, essential information describing setup and design of your system appears in the companion volumes of documentation called *PeopleSoft EnterpriseOne CRM 8.11 Application Fundamentals PeopleBook* and *PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook*.





# CHAPTER 1

## Getting Started with PeopleSoft EnterpriseOne Customer Self Service

This chapter discusses:

- Customer Self Service overview
- Customer Self Service implementation

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### Customer Self Service Overview

Customer Self Service enables customers access to their information, provides them with timely and accurate information, and enables them to submit order and support requests.

Through self service, customers can:

- Submit orders and review order status.

Before placing orders, customers can review inventory information to determine if adequate amounts are on-hand or adequate quantities are backordered before they submit orders.

- Review shipment status.

Customers can review estimated delivery date and time, freight charges, and shipment routes.

- Validate account transactions.

Customers can access their account, review invoices that apply to them, and identify any accounting discrepancies.

- Compare forecast information to schedules.

Customers can review forecast information and adjust forecasts or add new forecasts.

- Submit cases and search for resolutions.

Customers can submit cases and search for failure analysis information or solutions to help them resolve their issues, as well as submit solutions.

- Review service information

Customers can add and view equipment and view their contracts and work orders.

This PeopleBook discusses the setup and implementation features of Customer Self Service for Sales Order Management, Inventory Management, Transportation Management, Forecast Management, Failure Analysis, Case Management, and Solution Advisor.

Service Management Customer Self Service information is located in the PeopleSoft EnterpriseOne Service Management 8.11 PeopleBook.

See *PeopleSoft EnterpriseOne Service Management 8.11 PeopleBook*, “Using the Customer Self-Service Portal”.

## Customer Self Service Implementation

Implementing PeopleSoft EnterpriseOne Customer Self Service for a particular feature must be preceded by setting up the corresponding PeopleSoft EnterpriseOne application:

- Sales Order Management
- Inventory Management
- Transportation Management
- Forecast Management
- Failure Analysis
- Case Management
- Solution Advisor

For example, if you are implementing Customer Self Service to allow customers to review and submit orders, you must first set up and implement Sales Order Management before you implement Customer Self Service for Sales Order Management.

Each product’s Getting Started chapter contains specific implementation and component interface information for that product. This PeopleBook includes information about component interface features for customer self service as it relates to order submittal and review, shipment tracking, inventory inquiry, account payable inquiry, case submittal, failure analysis inquiry, and solution inquiry and submittal.

This section provides an overview of the steps that are required to implement the Customer Self Service system.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including installation guides and troubleshooting information. A complete list of these resources appears in the preface in the *About these PeopleBooks*, with information about where to find the most current version of each.

### Sales Order Management-Specific Implementation Steps

This table lists the required implementation steps for Customer Self Service in the Sales Order Management system:

Step	Reference
1. Set up processing options for the Recurring Orders program (P4004Z).	<i>PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook</i> , “Entering Sales Orders”
2. Set up processing options for the Sales Blanket Order Release program (P420111).	<i>PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook</i> , “Entering Additional Orders, Holding and Releasing Orders”
3. Set up processing options for the Item Hierarchy (Web) program (P4101H).	<a href="#">Chapter 4, “Placing Orders,” page 17</a>
4. Set up processing options for the Keyword Search program (P418929W).	<a href="#">Chapter 4, “Placing Orders,” page 17</a>

Step	Reference
5. Set up processing options for the Sales Order Entry program (P4210).	<i>PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook</i> , “Entering Sales Orders”
6. Set up processing options for the Self Service-Sales Order Inquiry program (P4210SS).	<a href="#">Chapter 3, “Working with Orders,” page 9</a>
7. Set up processing options for Order Templates (P4015W).	<a href="#">Chapter 4, “Placing Orders,” Ordering Through Templates, page 20</a>

## Inventory Management-Specific Implementation Steps

This table lists the required implementation steps for Customer Self Service in the Inventory Management system:

Step	Reference
1. Set up processing options for the Self Service-Inventory Information Inquiry program (P41204).	<a href="#">Chapter 6, “Performing Customer Inquiries,” page 25</a>
2. Set up processing options for the Item Cross Reference Self Service program (P4104SS).	<a href="#">Chapter 7, “Managing Customers and Items,” page 37</a>

## Transportation Management-Specific Implementation Steps

This table lists the required implementation step for Customer Self Service in the Transportation Management system:

Step	Reference
1. Set up processing options for the Self Service Shipment Tracking program (P4947S).	<a href="#">Chapter 6, “Performing Customer Inquiries,” page 25</a>

## Forecast Management-Specific Implementation Steps

This table lists the required implementation step for Customer Self Service in the Forecast Management system:

Step	Reference
1. Set up processing options for the Self Service-Display and Respond to Forecasts program (P3462).	<a href="#">Chapter 6, “Performing Customer Inquiries,” page 25</a>

## Failure Analysis-Specific Implementation Steps

This table lists the required implementation step for Customer Self Service in the Failure Analysis system:

Step	Reference
1. Set up processing options for the Self Service-Failure Analysis program (P17766SS).	<a href="#">Chapter 6, “Performing Customer Inquiries,” page 25</a>

## Case Management-Specific Implementation Steps

This table lists the required implementation steps for Customer Self Service in the Case Management system:

Step	Reference
1. Set up processing options for the Case Customer Self Service Inquiry and Add program (P90CG900).	<i>PeopleSoft EnterpriseOne Customer Relationship Management 8.11 Support Applications PeopleBook, "Setting Up Case Management Fundamentals"</i>
2. Set up processing options for the Customer Self Service Case Update program (P90CG910).	<i>PeopleSoft EnterpriseOne Customer Relationship Management 8.11 Support Applications PeopleBook, "Setting Up Case Management Fundamentals"</i>

## Solution Advisor-Specific Implementation Steps

This table lists the required implementation step for Customer Self Service in the Solution Advisor system:

Step	Reference
1. Define solutions with visibility of All so self service users can view the solution.	<i>PeopleSoft EnterpriseOne Customer Relationship Management 8.11 Support Applications PeopleBook, "Setting Up Solution Advisor"</i>

## CHAPTER 2

# Understanding Customer Self Service

This chapter introduces the main concepts in Customer Self Service. It discusses:

- PeopleSoft Customer Self Service business processes.
- PeopleSoft Customer Self Service implementation.

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## PeopleSoft Customer Self Service Business Processes

PeopleSoft Customer Self Service enables you to provide customers access to timely and accurate information without waiting for a response from a customer service agent. When you enable customers with quick and cost-effective access to information, not only are you making it easier for customers to conduct business with you, but you are also increasing supply chain efficiency and improving customer loyalty.

Customer Self Service enables customers to search for and access:

- Orders
- Shipments
- Inventory
- Accounts receivable
- Forecast
- Cases
- Failure analysis and solutions
- Service information

### Orders

Customers can use self service to view their orders, including shipment information, and to update limited order information, such as quantity requested, requested date, and description. The Self Service Sales Order Inquiry program (P4210SS) processing options control how customers can access and view order information.

You can set up recurring orders; templates that you use to enter information for orders that are always the same. You can specify that the system automatically generates an order on a regular schedule. Use the processing options in the Recurring Orders program (P4004Z) to define how recurring orders are used. Use the Sales Blanket Order Release program (P420111) to release sales orders against the blanket. Using customer self service, customers can review and possibly be prompted to approve their order information.

Customers can use the product catalog to view products by group and hierarchy to quickly search and select items to order. Use the Item Cross Reference Self Service program (P4104SS) to provide customers with their item numbers and descriptions.

Using the shopping cart functionality, customers can verify that they ordered the correct items and quantities before they confirm their orders.

## Shipments

Using self service, customers and suppliers can review the status of shipments. Customers can review the status of shipments from the supplier (outbound shipments), including the delivery date and time, freight charges, and shipment routes. Suppliers can review status of inbound shipments. If the supplier is using Federal Express, the customer can access its shipment tracking system to review shipment status. Set up the processing options in the Self Service Shipment Tracking program (P4947S) to control how the system displays shipment information.

## Inventory

Both suppliers and customers can use self service to review inventory information, such as general item information, item quantities, and reorder points. Customers can review this information to determine if adequate on-hand quantity is available or adequate quantities are back-ordered before they place their orders. Use the Inventory Information Inquiry program (P41204) processing options to control how information displays to customers.

## Accounts Receivable

Your customers can review the transactions that only apply to them, including open invoices and payment statuses to help identify and resolve accounting discrepancies.

## Forecast

Suppliers can use customer self service to provide customers (also known as planners) with personalized forecast information so they can compare it to schedules and modify and add new forecast information, as necessary. Set up the processing options in the Self Service- Display and Respond to Forecasts program (P3462) to specify how the system displays forecast information and what processes are available to customers.

## Cases

Using self service, customers can initiate and update cases using the Case CSS Inquiry and Add (Case Customer Self Service Inquiry and Add) (P90CG900) and the CSS Case Update (Customer Self Service Case Update) (P90CG910) programs. Customers can enter detailed issue information, so the system can route the case to the appropriate provider group to manage the case to resolution. Using the self service case programs, customers can search for script and solution records to assist them with resolving their cases.

## Failure Analysis and Solutions

If you are using failure analysis to support case resolution, the Self Service - Failure Analysis program (P17766SS) enables customers to access failure analysis information, including resolutions for their issues and cases.

If you are using the Solution Advisor program (P90CE050), customers can access and search for solutions to help them resolve their cases. Customers can also submit solutions for you to review and add to the solution library.

## Service Information

Customers can use self service to:

- Add and view equipment
- View contracts

- View work orders

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**Note.** The tasks and processes that are associated with service management customer self service are discussed in the Service Management PeopleBook.

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See *PeopleSoft EnterpriseOne Service Management 8.11 PeopleBook*, “Using the Customer Self-Service Portal”.

---

## PeopleSoft Customer Self Service Implementation

You access all Customer Self Service applications on the PeopleSoft Portal’s Customer Self Service tab. The Customer Self Service tab contains various portlets that enable you to access certain applications in different ways. For example, you might select the appropriate task, search for specific information before accessing the application, or receive alerts that you can use to access the application.

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**Note.** The Manage Demand Consensus link in the Tasks portlet provides direct access to the Demand Consensus functionality, which you use to work with conference rooms.

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# CHAPTER 3

## Working with Orders

This chapter provides an overview of working with orders and discusses how to:

- Manage orders.
- Manage recurring orders.
- Create sales orders from releasing blanket orders.

---

### Managing Orders

This section provides an overview of how to manage orders and forms used to manage orders.

#### Understanding Order Management

To place an order in a standard operating environment, the customers are usually assisted by personnel who are familiar with the system as well as with the process requirements. When you create a sales environment on the web, you must enable the customers to choose items from the inventory and create sales orders based on their selection.

When the customers enter orders using Customer Self Service, the system generates orders based on the customer information that is identified during login and the products that the customers select to add to an order. At any time, the customers can choose to cancel the order or place the order. The system does not create the order until the order is accepted. If Customer Self Service is unexpectedly disconnected, the system holds the customer's order until the customer accesses self service again. The system prompts the customer to review and continue processing the interrupted order, or delete it.

When the customers enter sales orders on the web, they can move freely between the menu applications. The system generates an order based on the customer information that is identified during login and the products that you select to add to an order.

As the customers add items to their sales orders, they can review and total the order and apply the appropriate taxes. Additionally, the customers can specify an alternate carrier or edit order information by accessing the appropriate options on the Row and Form menus. Customers can choose to cancel the order or place the order. The system does not create the order until they accept the order.

Customers can also use self service to review information for orders, including ship-to addresses, shipments, online invoices, and accounts. The customer might receive an alert or a message that prompts the customer to review the information, or the customer might want to review order information from the supplier's system. The customer can review and modify limited order information, such as quantity requested, requested date, and description.

The system uses the primary unit of measure from the Item Master. The system displays the unit price in the currency that is identified for the customer in Address Book program (P01012). The system retrieves item information, such as line type, from the F4102 or F4101 table.

Each application provides an option to add items to a user's order. If they do not know the item number, the customers can click the visual assist to access the Search by Keyword form to find it.

Since order entry, inquiry, and acceptance are part of Sales Order Entry program (P4210), set these processing options for creating Customer Self Service sales orders:

- You must activate Customer Self Service.
- You can activate the option, Display before Accept so that the customers can review order totals, including taxes before the system creates records in the F4201 and F4211 tables.

---

**Important!** Do not use online commitments in the version of the Sales Order Entry program (P4210) used for Customer Self Service. Activate the Store and Forward processing option for either Full or Partial Edit.

---

The enterprise (the company that uses PeopleSoft software) is responsible for setting the processing options for the Self Service - Sales Order Inquiry program (P4210SS). The processing options control:

- The default sort options for sales orders.
- The format of the information.  
For example, the enterprise might specify that header information be followed by detail information.
- The types of sales orders that customers can review.
- The versions that the Self Service - Sales Order Inquiry program uses.

## Prerequisites

Since order entry, inquiry, and acceptance are part of the Sales Order Entry program (P4210), set these processing options for version ZJDE0010 to create orders on the web:

- You must activate the Customer Self-Service Functionality option on the Process tab.
- You can activate the Display before Accept Prompt option on the Process tab so that the customers can review order totals, including taxes, before the system creates records in the F4201 and F4211 tables.

## See Also

*PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook*, “Entering Sales Orders,” Understanding Sales Order Detail Information

*PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook*, “Setting Up the System for Sales Order Management,” Setting Up Order Templates

*PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook*, “Entering Sales Orders,” Setting Processing Options for Sales Order Entry (P4210)

## Forms Used to Manage Orders

Form Name	Form ID	Navigation	Usage
View Order Detail	W4210SSE	From the Tasks portlet, select Manage Orders and then complete the advanced search information.	Review the sales order numbers and corresponding detail lines.  <b>Note.</b> If the enterprise sets the processing option to display order header information, the View Order Header form appears before the View Order Detail form.
View Order Detail	W4210SSB	On the View Order Detail form, click the sales order number.	Review the information on the Order tab and Ship To Address tab.
View Item Detail	W4210SSC	On the View Order Detail form, click the line number.	Review the information in the Item, Price, Quantity, and Dates sections.
View Accounts Payable	W03B2003A	On the View Order Detail form, click Account Info. for the appropriate detail line.	Review the amount that is due for a sales order.
View Sales Order Invoices	W42230A	On the View Order Detail form, click On-line Invoice.	Review realtime estimated invoice amounts for a sales order.
View Invoice Tax Information by Authority	W42235A	On the View Sales Order Invoices form, click Tax Summary in the detail area.	Review tax information for a sales order.
View Invoice Discount Summary	W42240A	On the View Sales Order Invoices form, click Discount Summary.	Review discount information for a sales order.

## Setting Up Processing Options for Self Service - Sales Order Inquiry (P4210SS)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Defaults

These processing options specify the default filter and sort options.

- 1. Order Filter Option** Specify the default filter option on the Advance Search form. Enter a value from UDC 42B/FO.
- 2. Header Sort Option** Specify the default sort option on the View Order Header form. Enter a value from UDC 42B/HS.
- 3. Detail Sort Option** Specify the default sort option on the View Order Detail form. Enter a value from UDC 42B/DS.

## Display

These processing options specify the types of information that the system displays.

- 1. Display Header or Detail** Specify whether the system displays the View Order Header form or the View Order Detail form when you inquire on orders. Values are:
  - Blank: The system displays the search results on the View Order Detail form. The system searches the F4211 table; only detail search criteria are available on the Advanced Search form.
  - I*: The system displays the search results on the View Order Header form. The system searches the F4201 table; only header search criteria are available on the Advanced Search form.
- 2. Customer Item X-Reference** Specify the code that the system uses to search and display cross-reference information using a customer's item number. Cross-references associate internal item numbers with customer item numbers. You set up items in the F4104 table and create the cross-reference information in the Item Cross Reference program (P4104). If you leave this processing option blank, the system does not display cross-reference information. Enter a value from UDC 41/DT.
- 3. Type Code** Enter a value from UDC 01/W0 to specify the type code of the who's who attention name that appears in the mailing address. If you leave this field blank, the system does not include the attention name line in the mailing address.

## Process

These processing options specify which order types the system processes.

- 1. Sales Order Types (Required)** Enter a value from UDC 00/DT to specify the order types that appear. You must enter at least one code. You can enter multiple codes; to do so, enter them without punctuation or spaces.
- 2. Include / Exclude (Future)** Future use.
  - Include or exclude the defined sales order types. Values are:
    - Blank: The system selects records for which the order types are equal to the sales order types.
    - I*: The system selects records for which the order types are not equal to the sales order types.
- 3. Blanket Order Type** Enter a value from UDC 00/DT to specify the type of document for blanket sales orders.

## Versions

These processing options specify the versions of programs that the system uses.

- |  |   |
|--|---|
| <b>1. Self-Service - Shipment Tracking (P4947S)</b>                      | Specify the version of the Self-Service - Shipment Tracking program (P4947S) that the system uses to display shipment information. If you leave this processing option blank, the system uses the ZJDE0001 version.         |
| <b>2. Self-Service - Customer Account Information Inquiry (P03B2003)</b> | Specify the version of the Self-Service - Customer Account Inquiry program (P03B2003) that the system uses to display account information. If you leave this processing option blank, the system uses the ZJDE0001 version. |
| <b>3. Self-Service - On-line Invoice (P42230)</b>                        | Specify the version of the Online Invoice Inquiry program (P42230) that the system uses to display billing information. If you leave this processing option blank, the system uses ZJDE0001.                                |
| <b>4. Self-Service - Sales Order Entry (P4210) - (Future use)</b>        | Specify the version of the Sales Order Entry program (P4210) that the system uses to retrieve customer self service processing information. If you leave this processing option blank, the system uses the JDE0001 version. |

---

## Managing Recurring Orders

This section describes how to manage recurring orders and lists the prerequisite and forms used to manage recurring orders.

### Understanding Recurring Orders

Recurring orders are templates that you use to enter information for orders that are always the same; creating recurring orders saves time. You can automatically generate an order weekly, monthly, or yearly.

You also can search for existing recurring orders and modify the recurring orders. For example, you can change sold to and ship to information, quantities, and unit prices.

### Prerequisite

Before you can use recurring orders, you must set up the processing options for the Recurring Orders program (P4004Z).

See *PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook*, “Entering Sales Orders,” Process Recurring Sales Orders.

## Forms Used to Manage Recurring Orders

Form Name	Form ID	Navigation	Usage
Manage Recurring Orders	W4004ZB	From the Tasks portlet, select Manage Recurring Orders.	Ensure that the enterprise has activated the processing option for Customer Self Service functionality in the Recurring Orders program (P4004Z).  Review the information in the detail area for each order number and select the order for which you want to manage information.
Edit Recurring Order	W4004ZA	On the Manage Recurring Order form, click Edit Order.	Modify the information in the header area and detail area and click Save Order.  <b>Note.</b> You can also delete a line on the order or delete the entire order.

---

## Creating Sales Orders by Releasing a Blanket Order

This section provides an overview of how to create sales orders by releasing blanket orders and lists the prerequisite and forms used to release blanket orders.

### Understanding Blanket Orders

You can create sales orders for customers with blanket orders. You use the Sales Blanket Order Release program (P420111) to manually deduct item quantities from a blanket order. The system creates a sales order for the quantity that you specify.

The system consolidates order lines based on sold to, branch/plant, and currency code information. The order numbers that a user enters can be consolidated in the same way as the system-generated sales orders. For example, if you select multiple records to release and enter a new order number for the first record only, the system consolidates the orders.

If you are using the Customer Relationship Management's (CRM) Customer Self Service version of the Sales Blanket Order Release program, you can partially release quantities from multiple blanket orders and from multiple lines on blanket orders provided that you have set the appropriate processing options. When the system creates the sales orders, you can review each sales order number that results. You can also cancel a single line that has been released (as opposed to having to cancel all of the lines that have been released).

### Prerequisite

Before you can use customer self service to release blanket orders, you must set up the processing options for the Sales Blanket Order Release program.

See *PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook*, "Entering Sales Orders," Process Recurring Sales Orders.

## Forms Used to Release Blanket Orders

Form Name	Form ID	Navigation	Usage
Search and Release Blanket Orders	W420111B	From the Tasks portlet, select Release Blanket Orders.	Select the blanket order for which you want to release full or partial quantities.
Specify Release Details	W420111C	On the Search and Release Blanket Orders form, select the blanket order and click Specify Release Details.	<p>Enter a new quantity in the Quantity to Release field. The system automatically populates the Quantity to Release field with a value of 1. If you do not want to release any quantity, enter 0.</p> <p>Review and change the value in the Request Date field, if necessary, and then click Release to Sales Order to generate sales orders. Click Cancel to release no quantities.</p> <p>The system creates one or more sales orders based on the quantities that you have chosen to release.</p>
Released Sales Order Confirmation	W420111D	On the Specify Release Details form, click Release to Sales Order.	Review the sales order numbers that the system created for the quantities that you released.





## CHAPTER 4

# Placing Orders

This chapter provides an overview of placing orders using PeopleSoft Customer Self Service and discusses how to place orders .

To place orders, you can:

- Order through the product catalog.
- Order through templates.
- Order using the shopping cart.

---

## Ordering Through the Product Catalog

This section discusses how to use the product catalog to place an order and lists the prerequisite and the forms used to access the product catalog.

### Understanding the Product Catalog

When customers access the enterprise's Web site, they can view products by group and hierarchy. Instead of having customers scroll through a list of inventory, you can assign items to groups and hierarchies in the Item Hierarchy (Web) program (P4101H). Assigning items to groups and hierarchies enables you to create departments, which customers use during order entry, when browsing for items.

The enterprise can also provide customers with customers' own item numbers and descriptions, as defined in the customer item cross-reference, which simplifies selecting an item from the catalog and adding the item to the shopping cart.

When the customers review the inventory for products, you must give them an opportunity to locate items based on descriptive text. Customers can use Keyword Search to locate items based on the descriptions that you defined in the Item Master Revisions form. To add the item to the order, select it, and click Add to Shopping Cart.

### Prerequisite

Before you can use the product catalog, you must define the processing options or the Item Hierarchy (Web) program and the Keyword Search program.

## Forms Used to Order Through the Product Catalog

Form Name	Form ID	Navigation	Usage
Search by Keyword	W41829WA	From the Tasks portlet, select Keyword search.	Locate an item by keyword and add it to the shopping cart.
Product Catalog	W4101HA	From the Tasks portlet, select Order Through Product Catalog.	Select the appropriate category for the item that you want to order.
Product Listing	W4101HC	On the Product Catalog form, click the appropriate category that contains the item.	Select the item that you want to order.
Product Information	W40ITM3A	On the Product Listing form, click the item.	Specify the quantity that you want to order and the approximate date that you need to receive the item.  Review the ship to information (which you can override), select the option for viewing shopping cart prior to placing the order, and then click Add to Shopping Cart.
Add Sales Order	W4210A	On the Product Information form, click Add to Shopping Cart.	Review and modify the order information as necessary and click Checkout.
Order Acceptance	W42232A	On the Add Sales Order form, click Checkout.	Click Place Order.

## Setting Up Processing Options for Keyword Search (P41829W)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Process

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

#### 1. Customer Self-Service Mode

This code indicates whether you are creating an order in standard order entry mode or Shopping Cart (or Self Service) mode. If you choose Shopping Cart mode, you can select items from multiple applications before using Sales

Order Entry (P4210) to create an order. You might use this feature if you are entering orders in a web environment. Values are:

Leave blank for standard mode or enter *1* for shopping cart mode.

- 2. Sales Order Entry Version** Enter a version of Sales Order Entry. The system uses this version only in the Customer Self-Service Mode.
- 3. Item Restriction Mode** Enter *1* to activate item restriction processing (only in Customer Self-Service Mode). Leave blank for no item restriction logic.
- 4. Show Item Availability** Enter *1* to show the product availability.

## Setting Up Item Hierarchy (Web) (P4101H)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Defaults

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

- Structure Type** Enter a user defined code (01/TS) that identifies a type of organizational structure that has its own hierarchy in the Address Book system (for example, email). When you create a parent/child relationship for accounts receivable, the structure type must be blank.
- SO Entry Version (P4210)** Enter a version of sales order entry (P4210).

### Process

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

- 1. Item Restrictions (1/0)** Enter *0* or leave blank and the system does not check for item restrictions or enter *1* and the system checks for item restrictions.
- 2. Check Availability (1/0)** Enter *0* or leave blank and the system does not check item availability or enter *1* and the system checks for item availability.
- 3. Item File** Leave blank and the system retrieves category codes from the item master or enter *1* and the system retrieves category codes from the item/branch.

## Ordering Through Templates

This section provides an overview of how to place an order using templates and forms used for order templates.

### Understanding Templates

You can use templates to expedite order processing by displaying the customer's most frequently ordered items. A template is a system-generated prediction about what the customer will order.

Customers can access their preferred selections with templates through Order Templates. Order Templates is a method to group items for the customers and speed the order entry process. Customers can create their own product groups that contain lists of their most commonly ordered items. Additionally, the customers can create a template from order history. The system retrieves the order information from the F42119 table.

At order entry time, customers can select the Order Templates group they wish to use. From the list of items that appear, they enter a quantity to order or they accept commonly ordered amounts.

### Forms Used to Order Through Templates

Form Name	Form ID	Navigation	Usage
Manage Order Templates	W4015WA	From the Tasks portlet, select Order Through Templates.	Select the template from which you want to create a sales order.
Select Items	W40215A	On the Manage Order Templates form, select the template and click Select.	Select the line that contains the item that you want to order and specify the quantity, unit of measure, and request date.
Add Sales Order	W4210A	On the Select Items form, click the Select option for the appropriate line and then click Add to Shopping Cart.	On the Detail Revisions tab, review the Ship To and Sold To information (which you can override) and the quantities of the items that you have requested.
Order Acceptance	W42232A	On the Add Sales Order form, click Checkout.	Click Place Order.

### Setting Up Processing Options for Order Templates (P4015W)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Versions

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

**Order Template Revisions (P4015)** Enter a version of order template revisions (P4015).

**Order Templates (P40215)** Enter a version of order templates (P40215).

**Sales Order Entry (P4210)** Enter the sequence number that identifies a version. You are allowed to set up multiple versions of certain menu selections, for example, reports.

## Process

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

**Order Template Processing** Use this processing option to specify which address number is used to create and display templates based on the Sold To Addressed or the Ship To Addressed values established in Customer Billing Instructions (P03013).  
Values are:  
Leave blank or enter *1* to use the sold to address or enter *2* to use the ship to address.



# CHAPTER 5

## Working with the Shopping Cart

This chapter provides an overview of the shopping cart and discusses how to use the shopping cart to:

- View and modify the contents of the shopping cart.
- Add items to the shopping cart.

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### Viewing and Modifying the Contents of the Shopping Cart

This section discusses how to view and modify the contents of the shopping cart.

#### Understanding the Shopping Cart

Before you check out and place an order, you can verify and modify the contents of the shopping cart to ensure that the order is complete and correct. After you place the order, the system updates the F4201 and F4211 tables.

#### Forms Used to View and Modify the Contents of the Shopping Cart

Form Name	Form ID	Navigation	Usage
Add Sales Order	W4210A	From the Tasks portlet, select View Shopping Cart.	Review each line that corresponds to the items that you have selected. Modify the information as necessary.
Order Acceptance	W42232A	On the Add Sales Order form, click Checkout.	Save changes by placing the order.

---

### Adding Items to the Shopping Cart

This section discusses how to add items to the shopping cart and the forms used to add items to the shopping cart.

#### Understanding Additions to the Shopping Cart

If you already know which items from the product catalog you want to order, you can order the items directly, rather than using the Item Hierarchy (Web) program (P4101H).

## Forms Used to Add Items to the Shopping Cart

<b>Form Name</b>	<b>Form ID</b>	<b>Navigation</b>	<b>Usage</b>
Add Sales Order	W4210A	From the Tasks portlet, select Add to Shopping Cart by Item.	Specify information such as requested date, item number, and unit of measure.
Order Acceptance	W42232A	On the Add Sales Order form, click Checkout.	Place the order.



## CHAPTER 6

# Performing Customer Inquiries

This chapter provides an overview of customer inquiries, lists the prerequisites, and discusses how to:

- Display inventory information for customers.
- Track shipments.
- Review account information.
- Review forecast information.
- Review problem analysis information.

---

## Displaying Inventory Information for Customers

This section discusses how to display inventory information for customers and the forms used to display inventory information.

### Understanding Inventory Information

Both suppliers and customers can use self service functionality to review a variety of inventory information, such as general item information, item quantities, and reorder points. A customer might want to review inventory to determine whether adequate on-hand quantity of an item exists for an order and whether an item is backordered. Processing options for the Self Service - Inventory Information Inquiry program (P41204) indicate whether the user is a supplier or customer.

### Prerequisite

Before you complete the tasks in this section:

- An administrator within the enterprise sets the appropriate processing options in the Self Service - Inventory Information Inquiry program to control information such as whether the system displays summary or detail information and whether the user is a supplier or customer.
- An administrator within the enterprise completes the appropriate processing option in the Self Service - Inventory Information Inquiry program with the cross-reference type from the F4104 table that the system uses when it searches for inventory information.

## Forms Used to Display Inventory Information for Customers

Form Name	Form ID	Navigation	Usage
Search for Inventory Information	W41204A	From the Tasks portlet, select View Inventory Availability.	Locate the appropriate item number.
View Inventory Information	W41204B	On the Search for Inventory Information form, select the appropriate item number.	<p>Refine the information that you want to view by selecting the appropriate view option, and then click Refresh.</p> <p>If the Quantity Available field appears in red, an inventory shortage exists. Depending on how the processing option is set, the system either displays the actual quantity or <i>Yes</i> or <i>No</i>.</p>

## Setting Up Processing Options for Self Service - Inventory Information Inquiry (P41204)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Defaults

These processing options specify the types of information that the system displays.

#### 1. Display Option

Specify how the system displays records and quantities for the default display option. Values are:

Blank or *1*: The system displays records in summary mode and quantities at the item level.

*2*: The system displays records in detail mode and quantities at the item/branch level.

#### 2. Supplier View Option

Specify the default view option for the supplier. Values are:

*01*: Display all items.

*02*: Display only the items whose on-hand quantity is zero or a negative number.

*03*: Display only the items whose on-hand quantity is below the safety stock level.

- 3. Customer View Option** Specify the default view option for the customer. Values are:  
*01*: Display all items.  
*02*: Display only the items with an available quantity greater than zero.
- 4. Quantity Display Option** Specify how the system displays quantities. Values are:  
 Blank: The system displays quantities in the actual numeric value.  
*1*: The system displays *Yes* if the actual quantity exceeds zero. The system displays *No* if the actual quantity is less than or equal to zero.

## Process

These processing options specify the supplier and customer information that the system processes.

- 1. Supplier Cross-Reference Type** Enter a value from UDC 41/DT to specify the cross-reference type by which the system searches for cross-reference information for a supplier item number. Cross-references associate internal item numbers with the supplier's item numbers. You can set up items in the F4101 table and create the cross-reference information in the Item Cross Reference program. If you leave this processing option blank, the system does not display and process any cross-reference information.
- 2. Customer Cross-Reference Type** Enter a value from UDC 41/DT to specify the cross reference type by which the system searches for cross-reference information for a customer item number. Cross-references associate internal item numbers with the customer's item numbers. You can set up items in the F4101 table and create the cross-reference information in the Item Cross Reference program. If you leave this processing option blank, the system does not display and process any cross-reference information.
- 3. Supplier Search Type** Enter a value from UDC 01/ST to specify the search type for the supplier. If you leave this processing option blank, the system uses search type *V*.
- 4. Customer Search Type** Enter a value from UDC 01/ST to specify the search type for the customer. If you leave this processing option blank, the system uses a search type *C*.

---

## Tracking Shipments

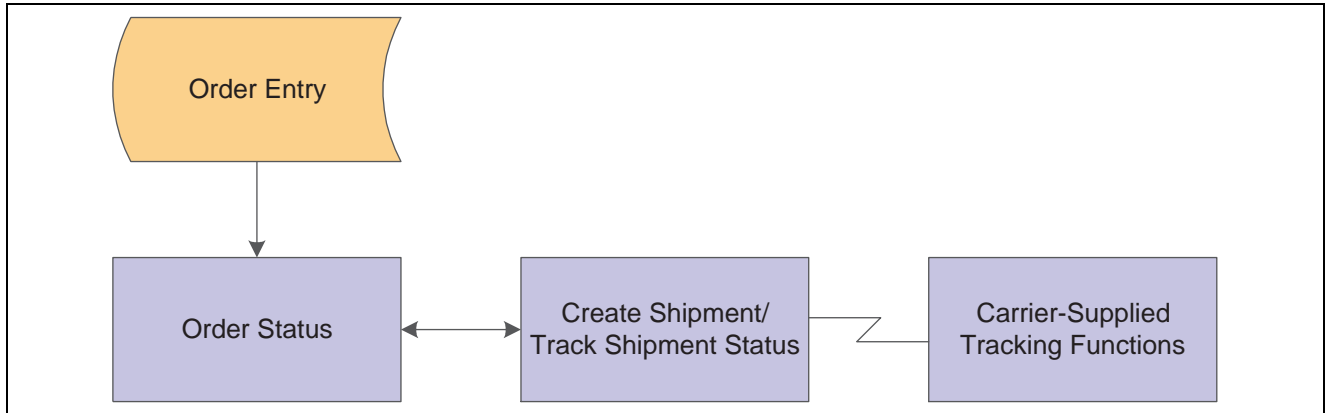
This section discusses how to track shipments and lists the prerequisite and the forms used to track shipments.

### Understanding Shipment Tracking

Both customers and suppliers can use self service functionality to review the status of shipments. Customers can review the status of shipments from the supplier (outbound shipments), including the delivery date and time, freight charges, and shipment routes. Suppliers can also review the status of inbound shipments.

The system displays all the shipments for the customer, and the customer can select a shipment and review the detailed information. Also, if the supplier is using a carrier who has a shipment tracking system, the customer can access the carrier's shipment tracking system to review the shipment status.

The process to track shipments is described graphically as follows:



Tracking shipments process

### Prerequisite

The organization must set processing options in the Self Service Shipment Tracking program (P4947S) to specify shipment statuses that the system uses to display shipments, customer and supplier cross-reference types, and the version of the Self Service Sales Order Inquiry program (P42101) to use.

### Forms Used to Track Shipments

Form Name	Form ID	Navigation	Usage
View Shipments	W4947SB	From the Tasks portlet, select Track Shipments, and then complete the advanced search information.	Select the appropriate shipment.
View Shipment Detail	W4947SC	On the View Shipments form, click the shipment number.	<p>Click the Shipment Information tab to review freight information and shipment tracking information.</p> <p><b>Note.</b> If the shipment has more than one route, the system displays the multiple routes and does not display the Track with Carrier option, which enables you to access the tracking system for an external carrier.</p> <p>Click the Date and Time tab to review information about shipment and delivery dates and times.</p> <p>Click the Ship to Address tab to review the address for the recipient of the shipment.</p>

## Setting Up Processing Options for Self Service Shipment Tracking (P4947S)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Default

These processing options specify the default values for shipment statuses and sorting.

- |   |   |
|---|---|
| <b>1. Shipment Status From (Required)</b> | Enter a value from UDC 49/SS to specify the lowest shipment status in a range of shipment statuses. The system uses the shipment status to display the list of shipments. |
| <b>2. Shipment Status Thru (Required)</b> | Enter a value from UDC 49/SS to specify the highest shipment status in a range of shipment statuses that the system uses to display the list of shipments.                |
| <b>3. Sorting Option (Required)</b>       | Enter a value from UDC 49/SB to specify the default sorting order that the system applies to the list of shipments.   |

### Display

These processing options specify how the system displays information.

- |   |  |
|---|--|
| <b>1. Customer Cross-Reference Type</b> | <p>Enter a value from UDC 41/DT that the system uses when searching cross-reference information for a customer item number. Cross-references associate internal item numbers with the customer's item numbers. You can set up items in the F4101 table and then create the cross-reference information in the Item Cross Reference program.</p> <p>If you leave this processing option blank, the system will not display and process any cross-reference information.</p>     |
| <b>2. Supplier Cross-Reference Type</b> | <p>Enter a value from UDC 41/DT that the system uses when searching for cross-reference information for a supplier item number. Cross-references associate internal item numbers with the supplier's item numbers. You can set up items in the F4101 table and then create the cross-reference information in the Item Cross Reference program.</p> <p>If you leave this processing option blank, the system does not display and process any cross-reference information.</p> |
| <b>3. Type Code</b>                     | Enter a value from UDC 01/W0 to specify the Who's Who attention name that appears in the mailing address.  |

### Versions

This processing option specifies the version of the Self Service - Sales Order Inquiry program (P4210SS) that the system uses.

- 1. Self Service Sales Order Inquiry (P4210SS)** Determine which version of the Self Service - Sales Order Inquiry program (P4210SS) the system uses to display sales order information. If you leave this processing option blank, the system uses version ZJDE0001.

## Reviewing Account Information

This section discusses how to review account information and the forms used to review account information.

### Understanding Account Information

Customers can use self service functionality to review their accounts payable information for only the transactions that pertain to them. Customers can review open invoices and payment statuses, and help to identify and resolve accounting discrepancies in the organization (the company that uses PeopleSoft software).

### Forms Used to Review Account Information

Form Name	Form ID	Navigation	Usage
View Accounts Payable Information	W03B2003A	From the Tasks portlet, select View Account Information.	Refine the information that the system displays by choosing the appropriate view and sort options and refreshing the display.
Account Information Detail	W03B2003D	On the View Accounts Payable Information form, select the appropriate invoice number.	Review the information on the Invoice Details, Amounts, and Dates tabs.
View Customer Receipts	W03B2003C	On the Account Information Detail form, click View Receipts.  If the invoice does not have any receipt information, the system does not display the View Receipts option on the Account Information Detail form.	Review the customer's receipts.
View Order Detail	W4210SSE	On the View Accounts Payable Information form, click the sales order number in the detail area. If no detail information exists for the sales order, the system displays a message.	Review the information on the Order and Ship To Address tabs.

---

## Reviewing Forecast Information

This section discusses how to review forecast information and lists the prerequisites and the forms used to review forecast information.

### Understanding Forecast Information

Forecasting is the process of projecting past sales demand into the future. Implementing a forecasting system enables you to quickly assess current market trends and sales so that you can make informed decisions about the company's operations. With Customer Self Service, customers can access the forecasts you have created for them. They can review and revise the forecasts for their company.

The system displays the forecast values and actual quantities or sales order extended price for the customer over a specified period of time. When the customers revise a forecast, they can change information in their forecast manually, and enter descriptive text for the forecast. Customers can only access their own forecast.

The system retrieves customer information, such as the customer number and currency code information, based on the login, which is attached to an address book number in User Profiles. If the customers do not enter a branch/plant in the processing options for Sales Order Entry (P4210), the system retrieves the default branch/plant based on the Ship-To address for the order.

### Prerequisite

Before you complete the tasks in this section:

- The organization must set the ABC Code Sales Value to *A* in the customer master information in the software to indicate that the customer who uses the Self Service - Display and Respond to Forecasts program (P3462) is a large customer. Indicating that the customer is a large customer enables the Self Service - Display and Respond to Forecasts program to select only the records that apply to that customer.
- The organization can set the appropriate processing options for the Self Service - Display and Respond to Forecasts program to specify both the way in which the system displays information and the activities, such as reviewing or modifying information, that customers are allowed to perform. The organization can also use processing options to specify different forecast types and the unit of measure in which the system displays forecasts.

## Forms Used to Review Forecast Information

Form Name	Form ID	Navigation	Usage
View Available Items/Branches	W3462C	From the Tasks portlet, select Manage Forecasts and complete the advanced search information.	Select to review forecast information for an item.  <b>Note.</b> You may have two options for the Detail Forecast field: <i>View</i> and <i>Edit</i> . <i>Edit</i> appears only if you have authority to modify forecast information.
View Forecast Information	W3462B	On the View Available Items/Branches form, click View in the Detail Forecast field for the appropriate item.	Review information such as request date, forecast quantity, forecast amount, original quantity, and original amount.

## Setting Up Processing Options for Self Service - Display and Respond to Forecasts (P3462)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Display

These processing options specify the types of information that the system displays.

- 1. Forecast Type (Required)** Enter a value from UDC 34/DF to specify the forecast type that the system displays.
- 2. Unit of Measure** Specify the unit of measure that the system uses. Values are:  
Blank: Use the primary unit of measure from the F4101 table.  
*1*: Use the pricing unit of measure from the F4101 table.  
*2*: Use the shipping unit of measure.

### Process

These processing options specify the types of information, such as user permissions for modifying forecasts, that the system processes.

- 1. Edit Mode** Specify the type of forecast action is performed. Values are:  
Blank: Do not allow edits and do not add forecasts.  
*1*: Allow edits to generated forecasts only.



- 2: Allow edits to generated forecasts and add new forecasts within the user-defined date range.
- 3: Allow edits to generated forecasts and add new forecasts to any date.
- 2. User-Defined From Date** Indicate the date from which the user is allowed to enter new forecasts. The system looks at this date only if the Edit Mode processing option value is 2.
- 3. User-Defined Thru Date** Indicate the date through which the user is allowed to enter new forecasts. The system looks at this date only if the Edit Mode processing option value is 2.
- 4. Customer Cross Reference Type** Specify the code with which the system searches cross-reference information using a customer item number. Cross-references associate internal item numbers with the customer's item numbers. You can set up items in the F4101 table and create the cross-reference information in Item Cross Reference program. Enter a value from UDC 41/DT. If you leave this processing option blank, the system does not display or process any cross-reference information.
- 5. Maximum Number of Matches** Specify the code with which the system searches cross-reference information using a customer item number. Cross-references associate internal item numbers with the customer's item numbers. You can set up items in the F4101 table and create the cross-reference information in the Item Cross Reference program. Enter a value from UDC 41/DT. If you leave this processing option blank, the system does not display and process any cross-reference information.

## Interop

These processing options specify information that the system uses for export processing.

- 1. Transaction Type** Specify the transaction type that the system uses for export processing. Enter a value from UDC 00/TT. If you leave this processing option blank, the system does not perform export processing.
- 2. Before/After Image Processing** Determine whether the system writes before and after images for export processing. Values are:
- Blank: Write after images only.
- I*: Write both before and after images.

---

## Reviewing Problem Analysis Information

This section discusses how to review problem analysis information and the forms used to review problem analysis information.

### Understanding Problem Analysis Information

The Self Service - Failure Analysis program (P17766SS) enables customers to access failure analysis information, including problems, analyses, and resolutions for issues with assets such as inventory items, equipment, product models, and so forth. Having access to this information enables customers to solve problems internally, reduce costs, increase production, reduce downtime, and increase the longevity of assets.

## Forms Used to Review Problem Analysis Information

Form Name	Form ID	Navigation	Usage
Search Problem Analysis	W17766SSC	From the Tasks portlet, select Search Problem Analysis.	Select to view information about the problem.
View Suggested Analyses/Resolutions	W17766SSB	On the Search Problem Analysis form, click View for the appropriate problem description.	Review the problem description and access more detailed information.
View Resolution Detail	W17766SSD	On the View Suggested Analyses/Resolutions form, click the resolution description.	Review the descriptive text for the resolution.

## Setting Up Processing Options for Self Service - Failure Analysis program (P17766SS)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Defaults

These processing options specify the default filter and sort options.

- 1. Failure Analysis Type** Enter a value from UDC 17/FT to specify the default failure analysis type. The system uses this information when searching for and also adding failure analysis codes. Values are:
- Blank: All types
  - 1: Values
  - 2: Analyses
  - 3: Resolutions

### Process

These processing options specify how the system displays information.

- 1. Maximum Record Counter** Specify the number of records the system displays. If you leave this field blank, the system displays 100 records.
- 2. Equipment Number Format** Define how the system validates and displays the equipment number. Values are:
- Blank: Equipment constants.

1: Equipment number

2: Unit number

3: Serial number

### 3. Media Object Display

Specify what media object displays. Values are:

Blank: First generic text item.

1: First OLE object.

2: First URL or file item (future)

The URL or file display will be available in a future EnterpriseOne release.

## Display

These processing options specify the types of information that the system displays.

### 1. Customer Item X-Reference

Enter a value from UDC 41/DT to specify how the system searches for and displays cross-reference information. If you leave this field blank, the system does not display cross-reference information.

Cross-references associate internal item numbers with the customer's item numbers. You set up items in the F4104 table and create cross-reference information in the Cross Reference Program.



## CHAPTER 7

# Managing Customers and Items

This chapter provides an overview of managing customers and items and discusses how to:

- Manage customer information.
- Manage customer item numbers.

---

## Managing Customer Information

This section discusses how to manage customer information and the forms used to manage customer information.

### Understanding Customer Information

Customers can access order and invoice information to review the status of the account. They can review and revise information about their company, their company's forecast, or their orders. They can also review invoices or compare the total accounts receivable and open orders to their current credit limit, which is assigned in the F03012 table, to determine if the credit limit has been exceeded.

A customer can also review additional information about the customer master information that is contained in the enterprise system. However, this information is for display only.

By reviewing and modifying address book information, the customer can resolve discrepancies within the enterprise system. Reviewing customer master information enables the customer to identify discrepancies and communicate them to the enterprise.

### Changing Name, Address, and Telephone Information

After you create the database of information about a customer, you maintain the database to ensure that the information is current. Company information such as name, address, and phone numbers can change. Also, information about employees and other individuals associated with the company can change. To support efforts to keep the address book information current, you can activate self service for the Address Book program (P01012).

When you activate self service for the Address Book, you allow the customers to review and change specific address book information about themselves such as name, address, phone number, effective date and who's who address book information.

### Personalizing Customer Information

You can allow customers to further personalize their company information through Customer Self Service. Depending upon their business practices, customers can further customize Customer Self Service by selecting different ship-to addresses or entering their purchase order numbers in the sales order header.

The customer's company might order items for multiple locations in one sales order. Customer Self Service sales order functionality enables them to select a different ship-to address for different order lines within each sales order they create.

The ship-to addresses for the customer can be organized into structures that correlate to their company, or the customers can choose from all addresses related to their company within the Address Book program (P01012). You specify the method the customers select ship-to addresses by enabling the Customer Self Service Ship To Structure Type processing option on the defaults tab in the Sales Order Entry program (P4210).

Customers can specify a purchase order number on their Customer Self Service sales order header. This enables them to better track their purchases and can help them fulfill their accounts payable processes.

## Forms Used to Manage Customer Information

Form Name	Form ID	Navigation	Usage
View Customer Information	W01012SSD	From the Tasks portlet, select Manage Customer Information.	Review the Company Name, Company Address, and Company Contact Information group boxes. Select to modify customer name information.
Edit Company Name	W01012SSA	On the View Customer Information form, click Edit in the Company Name group box.	Modify the primary mailing name and secondary mailing name. After you click OK, the system saves the changes.
Edit Company Contact	W01012SSB	On the View Customer Information form, click Edit in the Company Contact group box.	Modify company contact information.
Customer Master Information	W01012SSG	On the View Customer Information form, click View Additional Information.	Review information such as payment terms, the date the account was opened, to whom to send statements, delivery instructions, tax information, and so forth.  <b>Note.</b> You can request a credit limit change. The system sends an electronic message to the credit manager.

---

## Managing Customer Item Numbers

This section discusses how to manage customer item numbers and the forms used to manage customer item numbers.

## Understanding Customer Item Numbers

The Item Cross Reference Self Service program (P4104SS) enables you to manage the relationship between customer item numbers and the supplier's item numbers. Typically, customers use this program to review, manage, and add cross-reference items to the enterprise's database.

## Forms Used to Manage Customer Item Numbers

Form Name	Form ID	Navigation	Usage
Add Customer Item Numbers	W4104SSB	From the Tasks portlet, select Add Customer Item Numbers.	Add customer item numbers. To save the new item numbers, click OK.
Manage Customer Item Numbers	W4104SSA	From the Tasks portlet, select Manage Customer Item Numbers.	Modify customer item numbers. To save changes, click OK.
Edit Customer Item Numbers	W4104SSB	On the Manage Customer Item Numbers form, select the row that contains the appropriate item number and click Edit.	Review and modify information such as customer item number, customer item description, supplier item number, and effective and expired dates.  You can also add another customer item number on this form by selecting the Add Item Cross-Reference option.

## Setting Up Processing Options for Item Cross Reference Self Service (P4104SS)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Defaults

These processing options specify the default filter and sort options.

- 1. Customer Item Cross Reference Type Code** Enter a value from UDC 41/DT. The system defaults *C* (customer part numbers).
- 2. Customer Self Service Address Structure** Enter a value from UDC 01/TS to specify the address book organizational structure type to display. If you leave this field blank, the system displays all related address numbers.





# CHAPTER 8

## Using Portal Applications

This chapter provides an overview of the Customer Self Service (CSS) portal and discusses how to:

- Access portal application portlets.
- Use the CSS for support portlets.
- Use the CSS for service portlets.

---

### Understanding Portal Applications

A *portal* is a gateway that serves as a simple, unified access point to PeopleSoft EnterpriseOne applications. A portal delivers content and applications integrated with the PeopleSoft EnterpriseOne system, and provides a collaborative workplace.

#### Portlets

Portals can include one or more *portlets*. A portlet is a set of reusable components that provide access to PeopleSoft EnterpriseOne applications, Web-based content, and other resources. This means that Web pages and services or PeopleSoft EnterpriseOne applications can be accessed through specific various portlets.

Customer Self Service portlets enable you to do these things with cases, Solution Advisor, equipment, service contracts, and service work orders:

Functional Area	Portlet Functions
Cases	<ul style="list-style-type: none"><li>• View cases pertaining to the customer, listed in ascending priority order.</li><li>• Add new cases.</li><li>• Update existing cases.</li><li>• View or process an existing case's history.</li><li>• Search open cases, closed cases, and cases in the last 30 days.</li></ul>
Solution Advisor	Troubleshoot case or service order issues.
Equipment	<ul style="list-style-type: none"><li>• View equipment records pertaining to the customer, listed in ascending description order.</li><li>• Add new equipment records.</li><li>• Search an equipment record using the equipment number.</li></ul>

Functional Area	Portlet Functions
Service Work Order	<ul style="list-style-type: none"> <li>• View service orders pertaining to the customer. Also view associated equipment records and cases.</li> <li>• Search for a service work order.</li> </ul>
Service Contracts	<ul style="list-style-type: none"> <li>• View service contracts pertaining to the customer.</li> <li>• List expired contracts and future contracts.</li> </ul>

Portlets are grouped by type, which means that portlet applications for service and support appear in two different places. After you sign in to the Customer Self Service portal you then specify a place. Portlet applications are grouped in the CSS for Service or CSS for Support places. Here are the portlet applications for each place:

CSS For Service Portlets	CSS For Support Portlets
Service Tasks <ul style="list-style-type: none"> <li>• Add Equipment</li> <li>• View Equipment</li> <li>• View Work Orders</li> <li>• View Contracts</li> </ul>	Support Tasks <ul style="list-style-type: none"> <li>• View Cases</li> <li>• Add New Cases</li> </ul>
Service Search	Support Search
	Support Alerts
	Solution Advisor

## Portal Access

Portals are Web-based, so you access the Customer Self Service portal by opening a window in a Web browser such as Microsoft Internet Explorer. The implementation team that installed and configured the PeopleSoft EnterpriseOne Customer Self Service application software should have provided you with a URL (Universal Resource Locator) to access the portal.

After launching the Web browser, enter the URL in the browser's Address field. (Alternatively, the implementation team might have added a shortcut to the portal in your Favorites.) The portal Welcome page appears.

## Additional Information

Because portlets contain a subset of the functionality contained in the PeopleSoft EnterpriseOne applications, features and tasks are not fully described in this section. For example, this section does not describe how to add a new service order because that information is described in the PeopleSoft EnterpriseOne Service Management 8.11 PeopleBook.

See *PeopleSoft EnterpriseOne Service Management 8.11 PeopleBook* and *PeopleSoft EnterpriseOne Customer Relationship Management 8.11 Support Applications PeopleBook*.

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## Accessing Portal Application Portlets

This section discusses how to access the portal applications.

Access the portal Welcome page.

1. Click the Sign In link in the upper right corner.
2. On the standard PeopleSoft EnterpriseOne sign-in form, enter your user ID and password to enter the portal.
3. At the Place menu, select CSS for Service or CSS for Support. After you select one of these portal places, the application portlet windows for that place appear.



Portal Place menu

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## Using the CSS for Service Portlets

This section provides an overview of the CSS for Service portlets and discusses how to:

- Add equipment through the Service Tasks portlet.
- View equipment through the Service Tasks portlet.
- View work orders through the Service Tasks portlet.
- View contracts and entitlements through the Service Tasks portlet.
- Use the Service Search portlet.

## Forms Used by the CSS for Service Portlets

Form Name	Form ID	Navigation	Usage
Add Equipment	W90CD920A	Select CSS for Service from the portal's Place menu. Click Add Equipment in the Service Tasks window.	Add a new equipment record.
View Equipment	W90CD920C	Select CSS for Service from the portal's Place menu. Click View Equipment in the Service Tasks window.  Alternatively, select one of the equipment search options in the Service Search window's Search For menu, and then click Go.	View existing equipment record information.
View Service Work Orders	W90CD910C	Select CSS for Service from the portal's Place menu. Click View Service Work Orders in the Service Tasks window.  Alternatively, select one of the work order search options in the Service Search window's Search For menu, and then click Go.	View service work order information.
View Service Contracts and Entitlements	W90CD900A	Select CSS for Service from the portal's Place menu. Click View Contracts in the Service Tasks window.  Alternatively, select one of the contract search options in the Service Search window's Search For menu, and then click Go.	View service contract information.

### Adding Equipment Through the Service Tasks Portlet

Access the Add Equipment form.

The screenshot shows a web application interface for adding equipment. At the top, there's a navigation bar with 'Place: CSS For Service', 'My Favorites', and buttons for 'New Page', 'Edit Page', and 'Assign Permissions'. Below this is a 'Service Tasks' portlet header. The main content area is titled 'Add Equipment' and contains a form with the following fields and values:

- Equipment:** [Empty text box]
- Serial Number:** [Empty text box]
- Description:** [Empty text box]
- Site Number:** [Empty text box]
- Default Dealer:** [Empty text box]
- Inventory Item Number:** [Empty text box]
- Product Model:** [Empty text box]
- Registration Status:** 10 Entered
- Installation Date:** 10/20/04
- In Service Date:** 10/20/04
- Acquired Date:** 10/20/04
- Sales Type:** [Empty text box]
- Terms Accepted Flag:**

Buttons for 'Save' and 'Close' are located at the top left of the form area.

Add Equipment form

<b>Description</b>	Enter a brief description for the equipment.
<b>Site Number</b>	Enter the address book number that corresponds to the site where the equipment will reside.
<b>Default Dealer</b>	Enter the address book number that corresponds to the dealer who is the default equipment provider.
<b>Inventory Item Number</b>	Enter the system-assigned item number.
<b>Product Model</b>	Enter the code that classifies an inventory item into a model for customer service.
<b>Installation Date</b>	Enter the date on which the contract for the equipment asset was put into effect.
<b>In Service Date</b>	Enter the date on which the equipment was placed into service.
<b>Acquired Date</b>	Enter the date on which the equipment asset was acquired. This date is typically the start depreciation date, but you can specify a different start depreciation date on the Depreciation Information form. If you are using the half-year convention, you must manually adjust the start depreciation date.
<b>Sales Type</b>	Enter the user defined code (system SY, type 17) that indicates the sales type for the equipment.
<b>Terms Accepted Flag</b>	Enter the code that indicates whether the owner of the equipment has agreed to the terms and conditions presented regarding the equipment ownership.

## Viewing Equipment Through the Service Tasks Portlet

Access the View Equipment form.

Place: CSS For Service My Favorites New Page Edit Page Assign Permissions

**Service Search**

**View Equipment**

Add Close

Customer 7437352

Description \*

Product Model \*

Status \* through \*

Find

No records fetched.

Equipment Number	Description	Product Model	Equipment Status	Registration Status
No records fetched.				

**Equipment Detail**

Equipment Serial Number

View Equipment form

**Description**

Enter a brief description for the equipment.

**Product Model**

Enter the code that classifies an inventory item into a model for customer service.

**Status**

Enter the user defined code (system ES, type 12) that identifies the equipment's current status, such as available, down, or disposed.

## Viewing Work Orders Through the Service Tasks Portlet

Access the View Service Work Orders form.

Place: CSS For Service My Favorites New Page Edit Page Assign Permissions

**Service Tasks**

**View Service Work Orders**

Close

Customer 7437352 Jason S Alpern

Equipment Number

Order Number \*

Planned Start Date \* through \*

Find

**Work Orders**

No records fetched.

Order Number	Description	Status	Planned Start Date	Requested Finish Date	Equipment Number
No records fetched.					

Work Order Detail

View Service Work Orders form

**Equipment Number**

Enter the identification code for the equipment asset. You enter the identification code in one of these formats:

- 1 Asset number (a computer-assigned, 8-digit, numeric control number)
- 2 Unit number (a 12-character alphanumeric field)
- 3 Serial number (a 25-character alphanumeric field)

**Order Number**

Enter the number that identifies the sales order.

**Planned Start Date**

Enter the tentative starting date for the order. You can enter this date manually, or have the system calculate it using a back scheduling routine. The routine starts with the required date and offsets the total leadtime to calculate the appropriate start date.

## Viewing Contracts and Entitlements Through the Service Tasks Portlet

Access the Viewing Service Contracts and Entitlements form.

Place: CSS For Service My Favorites New Page Edit Page Assign Permissions

**Service Tasks**

**View Service Contracts and Entitlements**

Close

Customer: 7437352 *Jason S Alpern*

Contract Number: \*

Start Date: \* through \*

End Date: \* through \*

Find

**Service Contract Details**

No records fetched.

	Contract Number	Site Name	Description	Start Date	End Date	Cancel Date	Product Model	Product Family
No records fetched.								

View Service Contracts and Entitlements form

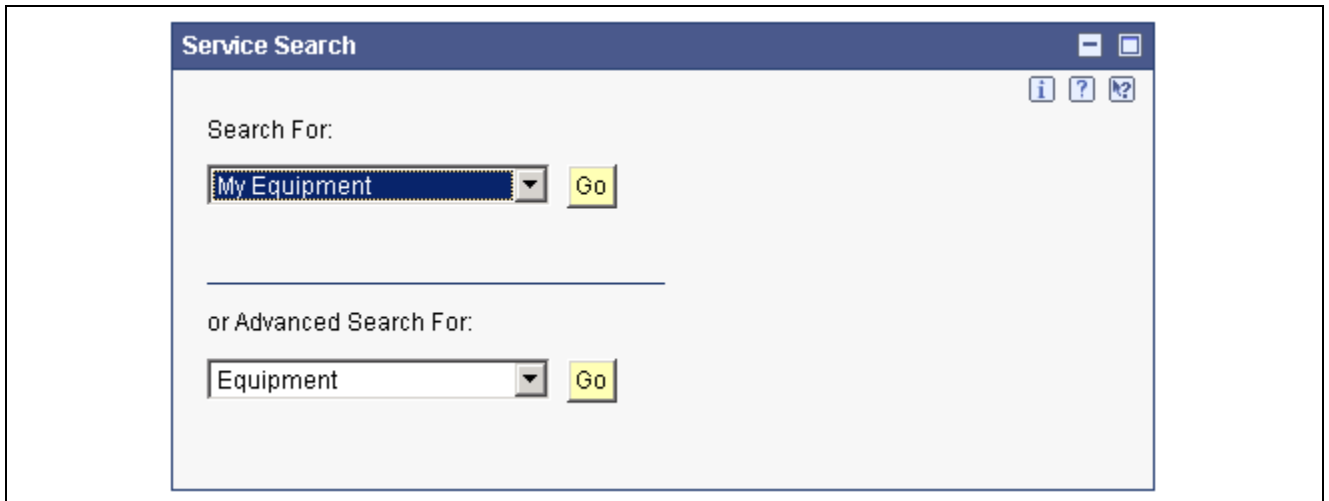
- Contract Number**            Enter the number that identifies the contract.
- Start Date**                    Enter the date on which you actually start work on the contract.
- End Date**                        Enter the date on which you actually complete work on the contract.

## Using the Service Search Portlet

Access the Service Search window.

1. Specify the type of search by selecting from the Search For field's menu.
2. Alternatively, you can also select from the Advanced Search For menu.
3. Click Go to proceed.
4. On the search form for the search type you specified, locate the desired service-related records.





Service Search window

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## Using the CSS for Support Portlets

This section provides an overview of the CSS for Support portlets and discusses how to:

- View cases through the Support Tasks portlet.
- Add new cases through the Support Tasks portlet.
- Use the Support Search portlet.
- Use the Support Alerts portlet.
- Use the Solution Advisor portlet.

## Forms Used by the CSS for Support Portlets

Form Name	Form ID	Navigation	Usage
Case Inquiry	W90CG900C	Select CSS for Support from the portal's Place menu. Click View Cases in the Support Tasks window.  Alternatively, in the Support Search window's Search For menu, select the search type and click Go.	View existing case information.
Case Entry and Update	W90CG900B	Select CSS for Support from the portal's Place menu. Click Add New Case in the Support Tasks.  Alternatively, click Add on the Case Inquiry form.	Add a new case.
Support Search	W90CG900C	Select CSS for Support from the portal's Place menu. In the Support Search window, select one of the contract search options in the Search For menu, and then click Go.	Search for cases.
Support Alerts	W90CG900C	Select CSS for Support from the portal's Place menu. Click the numeral for either Critical Cases or Cases Pending Action in the Support Alerts window.	View alerts for critical cases or cases that are pending action.
Solution Advisor Solution Search	W90CE100C	Select CSS for Support from the portal's Place menu. In the Solution Advisor window, enter a description of the problem and select the search parameters, and then click Find.	Search for solutions in the Solution Advisor.

### Viewing Cases Through the Support Tasks Portlet

Access the Case Inquiry form.

The screenshot shows a web application interface for 'Support Tasks'. At the top, there's a navigation bar with 'Place: CSS For Support', 'My Favorites', 'New Page', 'Edit Page', and 'Assign Permissions'. Below this is a 'Case Inquiry' section with 'Add' and 'Close' buttons. The form contains several input fields: 'Case Number' (with a plus sign), 'Customer' (with value '7437352' and name 'Jason S Alpern'), 'Equipment' (with a plus sign), and three date ranges: 'Beginning Date from', 'Status from', and 'Ending Date from', each with 'through' and a plus sign. A 'Find' button is at the bottom of the form. Below the form is a table with a header row: 'Case Number', 'Contact Name', 'Contact Area Code', 'Contact Phone', 'Problem', and 'Case Type Description'. The table body contains the text 'No records fetched.' and a small icon.

Case Inquiry form

**Case Number** Enter the number that identifies the case.

**Equipment** Enter the identification code for the equipment asset. You enter the identification code in one of these formats:

- 1 Asset number (a computer-assigned, 8-digit, numeric control number)
- 2 Unit number (a 12-character alphanumeric field)
- 3 Serial number (a 25-character alphanumeric field)

**Beginning Date From** Enter the date on which the case first becomes active.

**Through** Enter the last date on which the case becomes active.

**Status From and Through** Enter the code that specifies the status of a case.

**Ending Date From** Enter the first date on which the case was closed.

**Through** Enter the last date on which the case was closed.

## Adding New Cases Through the Support Tasks Portlet

Access the Case Entry and Update form.

The screenshot shows a web-based form for entering and updating a case. The form is divided into several sections:

- Customer Information:** Customer ID (7437352), Customer Name (Jason S Alpern), and Case Number (12892).
- Contact Information:** Contact Name (JASON ALPERN), Phone Number (two input fields), and E-Mail Address (one input field).
- Equipment Information:** Equipment Number (one input field).
- Timing Information:** Beginning Date/Time (10/22/04, 15:48:00).
- Problem Description:** A large text area for entering the problem details.

Below the form is a rich text editor with a toolbar containing options for font face (Courier New), size (10), bold, italic, underline, text color, bulleted list, numbered list, link, unlink, and print. At the bottom of the editor are two buttons: Save and Close.

Case Entry and Update form

- Contact Name** Enter the name of the contact for the case.
- Phone Number** Enter the telephone number prefix (such as area code) and the telephone number for the contact.
- Email Address** Enter the case contact's email address.
- Equipment Number** Enter the identification code for the equipment asset. You enter the identification code in one of these formats:
- 1 Asset number (a computer-assigned, 8-digit, numeric control number)
  - 2 Unit number (a 12-character alphanumeric field)
  - 3 Serial number (a 25-character alphanumeric field)
- Problem** Enter a brief description of the customer issue.

## Using the Support Search Portlet

Access the Support Search form.

1. At the Search For field, select from the menu the type of support-related record for which you want to search.
2. On the search form for the search type you selected, locate the support-related record.

Support Search form

## Using the Support Alerts Portlet

Access the Support Alerts form to view any critical cases and cases pending action

Support Alerts form

## Using the Solution Advisor Portlet

Access Solution Advisor window.

1. In the Problem Description field, enter a brief summary of the problem for which you want to find a solution.
2. Specify the search parameters (such as Match All) in the menu.
3. Click Find to search for and display results matching the problem description and search parameters.

Place: CSS For Support

My Favorites

New Page Edit Page Assign Permissions

**Solution Advisor**

**Solution Search**

Close

**Solution Search**

Search Solution: Match All

Display: 25 rows

Search

**Results**

No records fetched.

Record Description	ID	Title
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Solution Advisor Solution Search form

# Glossary of PeopleSoft Terms

<b>activity</b>	A scheduling entity in PeopleSoft EnterpriseOne Form Design Aid that represents a designated amount of time on a calendar.
<b>activity rule</b>	The criteria by which an object progresses from one given point to the next in a flow.
<b>add mode</b>	A condition of a form that enables users to input data.
<b>Advanced Planning Agent (APAg)</b>	A PeopleSoft EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of relational databases, flat file format, and other data or message encoding, such as XML.
<b>application server</b>	A server in a local area network that contains applications shared by network clients.
<b>as if processing</b>	A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction.
<b>alternate currency</b>	<p>A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction.</p> <p>In PeopleSoft EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued.</p>
<b>as of processing</b>	A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various PeopleSoft EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.
<b>back-to-back process</b>	A process in PeopleSoft EnterpriseOne Workflow Management that contains the same keys that are used in another process.
<b>batch processing</b>	<p>A process of transferring records from a third-party system to PeopleSoft EnterpriseOne.</p> <p>In PeopleSoft EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than EnterpriseOne to PeopleSoft EnterpriseOne Accounts Receivable and PeopleSoft EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to PeopleSoft EnterpriseOne.</p>
<b>batch server</b>	A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications.
<b>batch-of-one immediate</b>	<p>A transaction method that enables a client application to perform work on a client workstation, then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks.</p> <p>See also direct connect and store-and-forward.</p>
<b>business function</b>	A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable them to be called from a form, a database trigger, or a non-EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules, and other components to make up an application. Business functions can be created through

	event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.
<b>business function event rule</b>	See named event rule (NER).
<b>business view</b>	A means for selecting specific columns from one or more PeopleSoft EnterpriseOne tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data.
<b>central objects merge</b>	A process that blends a customer's modifications to the objects in a current release with objects in a new release.
<b>central server</b>	A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical PeopleSoft EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server.
<b>charts</b>	Tables of information in PeopleSoft EnterpriseOne that appear on forms in the software.
<b>connector</b>	Component-based interoperability model that enables third-party applications and PeopleSoft EnterpriseOne to share logic and data. The PeopleSoft EnterpriseOne connector architecture includes Java and COM connectors.
<b>contra/clearing account</b>	A general ledger account in PeopleSoft EnterpriseOne Financial Management that is used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations in PeopleSoft EnterpriseOne General Accounting.
<b>Control Table Workbench</b>	An application that, during the installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.
<b>control tables merge</b>	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
<b>cost assignment</b>	The process in PeopleSoft EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.
<b>cost component</b>	In PeopleSoft EnterpriseOne Manufacturing Management, an element of an item's cost (for example, material, labor, or overhead).
<b>cross segment edit</b>	A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.
<b>currency restatement</b>	The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting.
<b>database server</b>	A server in a local area network that maintains a database and performs searches for client computers.
<b>Data Source Workbench</b>	An application that, during the Installation Workbench process, copies all data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the System-release number data source. It also updates the Data Source Plan detail record to reflect completion.



<b>date pattern</b>	A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting.
<b>denominated-in currency</b>	The company currency in which financial reports are based.
<b>deployment server</b>	A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.
<b>detail information</b>	Information that relates to individual lines in PeopleSoft EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).
<b>direct connect</b>	A transaction method in which a client application communicates interactively and directly with a server application.  See also batch-of-one immediate and store-and-forward.
<b>Do Not Translate (DNT)</b>	A type of data source that must exist on the iSeries because of BLOB restrictions.
<b>dual pricing</b>	The process of providing prices for goods and services in two currencies.
<b>edit code</b>	A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information.
<b>edit mode</b>	A condition of a form that enables users to change data.
<b>edit rule</b>	A method used for formatting and validating user entries against a predefined rule or set of rules.
<b>Electronic Data Interchange (EDI)</b>	An interoperability model that enables paperless computer-to-computer exchange of business transactions between PeopleSoft EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems.
<b>embedded event rule</b>	An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule.
<b>Employee Work Center</b>	A central location for sending and receiving all PeopleSoft EnterpriseOne messages (system and user generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages.
<b>enterprise server</b>	A server that contains the database and the logic for PeopleSoft EnterpriseOne or PeopleSoft World.
<b>EnterpriseOne object</b>	A reusable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects.
<b>EnterpriseOne process</b>	A software process that enables PeopleSoft EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. PeopleSoft EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.
<b>Environment Workbench</b>	An application that, during the Installation Workbench process, copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the System-release number data source. It also updates the Environment Plan detail record to reflect completion.
<b>escalation monitor</b>	A batch process that monitors pending requests or activities and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.

<b>event rule</b>	A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field.
<b>facility</b>	An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. A facility is sometimes referred to as a <i>business unit</i> .
<b>fast path</b>	A command prompt that enables the user to move quickly among menus and applications by using specific commands.
<b>file server</b>	A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network user request files and make changes to these files.
<b>final mode</b>	The report processing mode of a processing mode of a program that updates or creates data records.
<b>FTP server</b>	A server that responds to requests for files via file transfer protocol.
<b>header information</b>	Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows.
<b>interface table</b>	See Z tables.
<b>integration server</b>	A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.
<b>integrity test</b>	A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
<b>interoperability model</b>	A method for third-party systems to connect to or access PeopleSoft EnterpriseOne.
<b>in-your-face-error</b>	In PeopleSoft EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.
<b>IServer service</b>	Developed by PeopleSoft, this internet server service resides on the web server and is used to speed up delivery of the Java class files from the database to the client.
<b>jargon</b>	An alternative data dictionary item description that PeopleSoft EnterpriseOne or People World displays based on the product code of the current object.
<b>Java application server</b>	A component-based server that resides in the middle-tier of a server-centric architecture. This server provides middleware services for security and state maintenance, along with data access and persistence.
<b>JDBNET</b>	A database driver that enables heterogeneous servers to access each other's data.
<b>JDEBASE Database Middleware</b>	A PeopleSoft proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.
<b>JDECallObject</b>	An API used by business functions to invoke other business functions.
<b>jde.ini</b>	A PeopleSoft file (or member for iSeries) that provides the runtime settings required for EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running PeopleSoft EnterpriseOne. This includes workstations and servers.
<b>JDEIPC</b>	Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.

<b>jde.log</b>	The main diagnostic log file of PeopleSoft EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of PeopleSoft EnterpriseOne.
<b>JDENET</b>	PeopleSoft proprietary communications middleware package. This package is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all PeopleSoft EnterpriseOne supported platforms.
<b>Location Workbench</b>	An application that, during the Installation Workbench process, copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the System data source.
<b>logic server</b>	A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when PeopleSoft EnterpriseOne and World software runs.
<b>MailMerge Workbench</b>	An application that merges Microsoft Word 6.0 (or higher) word-processing documents with PeopleSoft EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.
<b>master business function (MBF)</b>	An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases.
<b>master table</b>	See published table.
<b>matching document</b>	A document associated with an original document to complete or change a transaction. For example, in PeopleSoft EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.
<b>media storage object</b>	Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.
<b>message center</b>	A central location for sending and receiving all PeopleSoft EnterpriseOne messages (system and user generated), regardless of the originating application or user.
<b>messaging adapter</b>	An interoperability model that enables third-party systems to connect to PeopleSoft EnterpriseOne to exchange information through the use of messaging queues.
<b>messaging server</b>	A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions.
<b>named event rule (NER)</b>	Encapsulated, reusable business logic created using event rules, rather than C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work.
<b><i>nota fiscal</i></b>	In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.
<b><i>nota fiscal factura</i></b>	In Brazil, a nota fiscal with invoice information. See also <i>nota fiscal</i> .

<b>Object Configuration Manager (OCM)</b>	In PeopleSoft EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user.
<b>Object Librarian</b>	A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of PeopleSoft EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.
<b>Object Librarian merge</b>	A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.
<b>Open Data Access (ODA)</b>	An interoperability model that enables you to use SQL statements to extract PeopleSoft EnterpriseOne data for summarization and report generation.
<b>Output Stream Access (OSA)</b>	An interoperability model that enables you to set up an interface for PeopleSoft EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.
<b>package</b>	EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where on the deployment server the installation program can find them. It is point-in-time snap shot of the central objects on the deployment server.
<b>package build</b>	A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in PeopleSoft EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build.  Consider the following context: “Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions.” The process of creating a package build is often referred to, as it is in this example, simply as “a package build.”
<b>package location</b>	The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored.
<b>Package Workbench</b>	An application that, during the Installation Workbench process, transfers the package information tables from the Planner data source to the System-release number data source. It also updates the Package Plan detail record to reflect completion.
<b>PeopleSoft Database</b>	See JDEBASE Database Middleware.
<b>planning family</b>	A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.
<b>preference profile</b>	The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.
<b>print server</b>	The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself.
<b>pristine environment</b>	A PeopleSoft EnterpriseOne environment used to test unaltered objects with PeopleSoft demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.

<b>processing option</b>	A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.
<b>production environment</b>	A PeopleSoft EnterpriseOne environment in which users operate EnterpriseOne software.
<b>production-grade file server</b>	A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.
<b>program temporary fix (PTF)</b>	A representation of changes to PeopleSoft software that your organization receives on magnetic tapes or disks.
<b>project</b>	In PeopleSoft EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.
<b>promotion path</b>	<p>The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path):</p> <p>11&gt;21&gt;26&gt;28&gt;38&gt;01</p> <p>In this path, <i>11</i> equals new project pending review, <i>21</i> equals programming, <i>26</i> equals QA test/review, <i>28</i> equals QA test/review complete, <i>38</i> equals in production, <i>01</i> equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.</p>
<b>proxy server</b>	A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.
<b>published table</b>	Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
<b>publisher</b>	The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
<b>pull replication</b>	One of the PeopleSoft methods for replicating data to individual workstations. Such machines are set up as pull subscribers using PeopleSoft EnterpriseOne data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the F98DRPCN table.
<b>QBE</b>	An abbreviation for query by example. In PeopleSoft EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.
<b>real-time event</b>	A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and to provide notification to third-party software, end users, and other PeopleSoft systems that have requested notification when certain transactions occur.
<b>refresh</b>	A function used to modify PeopleSoft EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.
<b>replication server</b>	A server that is responsible for replicating central objects to client machines.
<b>quote order</b>	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

	In PeopleSoft EnterpriseOne Sales Order Management, item and price information for a customer who has not yet committed to a sales order.
<b>selection</b>	Found on PeopleSoft menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
<b>Server Workbench</b>	An application that, during the Installation Workbench process, copies the server configuration files from the Planner data source to the System-release number data source. It also updates the Server Plan detail record to reflect completion.
<b>spot rate</b>	An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.
<b>Specification merge</b>	A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
<b>specification</b>	A complete description of a PeopleSoft EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
<b>Specification Table Merge Workbench</b>	An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.
<b>store-and-forward</b>	The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.
<b>subscriber table</b>	Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.
<b>supplemental data</b>	<p>Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee's job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs.</p> <p>For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across PeopleSoft EnterpriseOne systems.</p>
<b>table access management (TAM)</b>	The PeopleSoft EnterpriseOne component that handles the storage and retrieval of use-defined data. TAM stores information, such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.
<b>Table Conversion Workbench</b>	An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.
<b>table conversion</b>	An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.
<b>table event rules</b>	Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although PeopleSoft EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.
<b>terminal server</b>	A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.

<b>three-tier processing</b>	The task of entering, reviewing and approving, and posting batches of transactions in PeopleSoft EnterpriseOne.
<b>three-way voucher match</b>	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.
<b>transaction processing (TP) monitor</b>	A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and may include programs that validate data and format terminal screens.
<b>transaction set</b>	An electronic business transaction (electronic data interchange standard document) made up of segments.
<b>trigger</b>	One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.
<b>triggering event</b>	A specific workflow event that requires special action or has defined consequences or resulting actions.
<b>two-way voucher match</b>	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.
<b>User Overrides merge</b>	Adds new user override records into a customer's user override table.
<b>variance</b>	In Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment.  In EnterpriseOne Project Costing and EnterpriseOne Manufacturing Management, the difference between two methods of costing the same item (for example, the difference between the frozen standard cost and the current cost is an engineering variance). Frozen standard costs come from the Cost Components table, and the current costs are calculated using the current bill of material, routing, and overhead rates.
<b>Version List merge</b>	The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release, as well as their processing options data.
<b>visual assist</b>	Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.
<b>vocabulary override</b>	An alternate description for a data dictionary item that appears on a specific PeopleSoft EnterpriseOne or World form or report.
<b>wchar_t</b>	An internal type of a wide character. It is used for writing portable programs for international markets.
<b>web application server</b>	A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.
<b>web server</b>	A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.
<b>Windows terminal server</b>	A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

<b>work day calendar</b>	In EnterpriseOne Manufacturing Management, a calendar that is used in planning functions that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. A work day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.
<b>workflow</b>	The automation of a business process, in whole or in part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.
<b>workgroup server</b>	A server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.
<b>XAPI events</b>	A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and then calls third-party software, end users, and other PeopleSoft systems that have requested notification when the specified transactions occur to return a response.
<b>XML CallObject</b>	An interoperability capability that enables you to call business functions.
<b>XML Dispatch</b>	An interoperability capability that provides a single point of entry for all XML documents coming into PeopleSoft EnterpriseOne for responses.
<b>XML List</b>	An interoperability capability that enables you to request and receive PeopleSoft EnterpriseOne database information in chunks.
<b>XML Service</b>	An interoperability capability that enables you to request events from one PeopleSoft EnterpriseOne system and receive a response from another PeopleSoft EnterpriseOne system.
<b>XML Transaction</b>	An interoperability capability that enables you to use a predefined transaction type to send information to or request information from PeopleSoft EnterpriseOne. XML transaction uses interface table functionality.
<b>XML Transaction Service (XTS)</b>	Transforms an XML document that is not in the PeopleSoft EnterpriseOne format into an XML document that can be processed by PeopleSoft EnterpriseOne. XTS then transforms the response back to the request originator XML format.
<b>Z event</b>	A service that uses interface table functionality to capture PeopleSoft EnterpriseOne transactions and provide notification to third-party software, end users, and other PeopleSoft systems that have requested to be notified when certain transactions occur.
<b>Z table</b>	A working table where non-PeopleSoft EnterpriseOne information can be stored and then processed into PeopleSoft EnterpriseOne. Interface tables also can be used to retrieve PeopleSoft EnterpriseOne data. Interface tables are also known as interface tables.
<b>Z transaction</b>	Third-party data that is properly formatted in interface tables for updating to the PeopleSoft EnterpriseOne database.



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