
PeopleSoft Enterprise Collaborative Supply Management 9.0 PeopleBook

September 2006

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About This PeopleBook Preface

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

This preface discusses:

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

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an 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 Enterprise applications are defined in this preface.

PeopleSoft Enterprise 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 Enterprise applications.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, 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 Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise 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 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 Enterprise applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, <http://www.oracle.com/technology/documentation/psftent.html>.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release 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
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft Enterprise 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.
. . . (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 ().

Typographical Convention or Visual Cue	Description
[] (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 Enterprise system.

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

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

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Collaborative Supply Management Preface

This preface discusses:

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

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

PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise Collaborative Supply Management 9.0 PeopleBook* provides you with implementation and processing information for the Oracle's PeopleSoft Enterprise Collaborative Supply Management system. However, additional, essential information describing the setup and design of the system resides in companion documentation. The companion documentation consists of important topics that apply to many or all of Oracle's PeopleSoft Enterprise applications across the Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of these PeopleBooks.

These companion PeopleBooks contain information that applies specifically to Oracle's PeopleSoft Enterprise Collaborative Supply Management.

- *PeopleSoft Enterprise Application Fundamentals PeopleBook*
- *PeopleSoft Enterprise Order-to-Cash Common Information PeopleBook*
- *PeopleSoft Enterprise Source-to-Settle Common Information PeopleBook*
- *PeopleSoft Enterprise Purchasing PeopleBook*
- *PeopleSoft Enterprise Managing Items PeopleBook*
- *PeopleSoft Enterprise Supply Chain Management Integration PeopleBook*

Pages With Deferred Processing

Several pages in Oracle's PeopleSoft Enterprise Collaborative Supply Management operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page—for example, if a field contains a default value, any value you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Designer

Common Elements Used in This PeopleBook

As of Date	The first date for which a report or process includes data.
BU or Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Freeflow text up to 256 characters.
Short Description	Freeflow text up to 15 characters.
Effective Date	Date which a table row becomes effective; the date that an action begins. For example, if you want to close a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages and batch processes that use the information use the current row. <i>See Enterprise PeopleTools 8.48 PeopleBook: Using PeopleSoft Applications</i>
Language or Language Code	The language of the field labels and report headings of reports to print. The filed values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Process Frequency	Designates the appropriate frequency to process: • <i>Once</i>: Executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to <i>Don't Run</i>. • <i>Always Executes</i>: Executes the request every time the batch process runs. • <i>Don't Run</i>: Ignores the request when the batch process runs.
Process Monitor	View the status of submitted process requests. <i>See Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler.</i>
Report ID	The report identifier.
Report Manager	View report content, check the status of a report, and see detailed messages.
Run Control ID	A request identification that represents a set of selection criteria for a report or process.
Run	Specify the location where a process or job runs and the process output format.
Status	Check the progress of a report or process. A valid status is <i>Posted</i> , <i>Not Posted</i> , <i>Generated</i> , <i>Processing</i> , or <i>Scheduled</i> .
User ID	The system identifier for the individual who generates a transactions.
Instance or Prcs Instance	The number that represents where the request is in the queue.

CHAPTER 1

Getting Started with PeopleSoft Enterprise Collaborative Supply Management

This chapter discusses:

- Collaborative Supply Management integrations.
- Collaborative Supply Management implementation.

Collaborative Supply Management Integrations

Collaborative Supply Management integrates with these PeopleSoft applications:

- PeopleSoft Enterprise Flow Production
- PeopleSoft Enterprise Inventory

PeopleSoft Enterprise Flow Production

If you are using Flow Production, once the replenishment is dispatched, the vendors can use the View Kanban Requests transaction in Collaborative Supply Management to view dispatched replenishment requests, as well as those requests already processed and received by you.

PeopleSoft Enterprise Inventory

If you are using Inventory and the consigned inventory feature, suppliers with the appropriate access can retrieve relevant inventory quantity on hand information and replenishment parameters in Collaborative Supply Management.

Collaborative Supply Management Implementation

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

Collaborative Supply Management Workflows

If you have enabled PeopleSoft Workflow, you can use these workflow to dispatch schedules to suppliers and receive the collaborated schedules back into PeopleSoft Collaborative Supply Management:

- PO Supplier Schedule Dispatch (purchase order supplier schedule dispatch): This workflow notifies the supplier that a schedule has been dispatched.

- PO Supplier Change (purchase order supplier change): This workflow notifies the buyer that the supplier has changed the supplier schedule and has sent the changes.

Other Sources of Information

In the planning phase of the implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, with information about where to find the most current version of each.

See Also

Chapter 3, “Using Collaborative Planning Schedules,” page 15

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook

CHAPTER 2

Implementing Collaborative Supply Management

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

- Review Kanban requests.
- Review inventory quality balances.
- Create collaborative schedules.

Understanding PeopleSoft Collaborative Supply Management

This section lists prerequisites and discusses Collaborative Supply Management functional areas.

Prerequisites

Before suppliers can begin using Collaborative Supply Management, you must enable them to sign in successfully.

To set up supplier defaults, use the Supplier Side Setup Defaults component (PO_SUPP_SETUP).

Set up a vendor's profile by associating each vendor with a user ID. Use the Vendor User Setup component in PeopleSoft Purchasing. Each user ID can be associated with multiple vendor codes. Then, when a user signs in to Collaborative Supply Management, the system determines the vendor with whom the user is associated. If a user is associated with multiple vendors, the Select Vendor page enables the user to select a vendor. If no vendor code is assigned to the user, then the system administrator needs to assign a vendor code to a user ID.

See Also

PeopleSoft Enterprise Source to Settle Common Information 9.0 PeopleBook, “Maintaining Vendor Information,” Vendor Profiles

Collaborative Supply Management Functional Areas

Collaborative Supply Management enables you to collaborate more effectively with suppliers regarding inventory planning and replenishment. Collaborative Supply Management also enables suppliers to review and act upon pertinent requests and information shared in the system. Suppliers can only view information pertinent to them, based on user sign-in and assigned vendor code.

The features in Collaborative Supply Management include supplier-facing pagelets. PeopleSoft portal technology enables users to personalize home pages and include pagelets such as Recently Dispatched Schedules and Remaining Quantity Balances. These pagelets offer suppliers up-to-the-minute information about recent planning schedules and graphical views of the inventory levels, which are prioritized based on their proximity to the reorder point.

Collaborative Supply Management consists of three functional areas:

- Collaborative planning schedules.

Use collaborative planning schedules to collaborate on schedule-based planned purchases with suppliers. These planned purchases can come from PeopleSoft Enterprise Supply Planning or can be entered from another source. You can generate and share a bucketed view of the demand information. the supplier can then use a collaborative web application to review, maintain, and return supply information.

- Kanban request review.

This web application enables suppliers to view current and past electronic Kanban delivery requirements initiated from Flow Production.

- Inventory quantity balance review.

This web application enables suppliers to view current, on-hand balances for the vendor-managed items that they supply.

Reviewing Kanban Requests

Suppliers use this set of pages to view current and past Kanban replenishment requests (electronic Kanbans) that have been dispatched, are in the process of being received, or are completed. This complements the Kanban dispatch process and enables the supplier to audit individual Kanban requests.

This section discusses how to:

- View vendor Kanban requests.
- View vendor-sourced replenishment requests.
- View details for vendor-sourced replenishment requests that are outstanding or have just been dispatched.
- Display additional information about an inventory business unit.

Pages Used to Review Kanban Requests

Page Name	Object Name	Navigation	Usage
View Kanban Requests - Select Vendor	SF_SS_VND_LIST	Manage Supply, View Kanban Requests	Select the vendors whose Kanban requests you want to review. <i>See PeopleSoft Enterprise eSupplier Connection 9.0 PeopleBook, "Maintaining Vendor Information," Maintaining External Users.</i> Note. This page does not appear if only one vendor is associated with the user.
View Kanban Requests	SF_VND_KANBAN_LIST	Manage Supply, View Kanban Requests Click a vendor name on the View Kanban Requests - Select Vendor page (if user is associated with multiple vendors). Use this page if user isn't associated with multiple vendors.	View vendor-sourced replenishment requests that have been dispatched, are in process, and are completed.
Vendor Kanban Request Details	SF_VND_KANBAN_SP	Click a Kanban ID link in the Kanban ID column on the View Kanban Requests page.	View details for vendor-sourced replenishment requests that are outstanding or have just been dispatched.

Viewing Vendor-Sourced Replenishment Requests

Access the View Kanban Requests page.

View Kanban Requests

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*Show Status: Dispatched [Return to Vendor List](#)

Kanbans								Customize	Find	View All	First	1-3 of 3	Last
Kanban ID	Status	Item ID	Description	Vendor Qty	UOM	Ship To	Date Time Dispatched	Viewed					
KBI000000000104	Dispatched	WHEEL	Wheel Tire, 700x23	100.0000	EA	COLORADO BIKE MFG/OUTDOOR	07/24/2000 3:13PM	☐					
KBI000000000103	Dispatched	WHEEL	Wheel Tire, 700x23	100.0000	EA	COLORADO BIKE MFG/OUTDOOR	07/24/2000 3:13PM	☐					
KBI000000000101	Dispatched	WHEEL	Wheel Tire, 700x23	100.0000	EA	COLORADO BIKE MFG/OUTDOOR	07/24/2000 3:13PM	☐					

[View All](#) [View Unread](#)

View Kanban Requests page

Show Status

Values are:

- Complete:* Displays items that have been delivered to the work in progress (WIP) location that generated the request.

- *Dispatched*: Displays item requests that have been dispatched to the vendor and are awaiting receipt.
- *In Process*: Displays items that have been received but not yet put away in the WIP location that generated the request.
- *All*: Displays all Kanban requests.

Sort By

Values are:

- *Date/Time Dispatched*
- *Item ID*
- *Kanban ID*
- *Replenishment Status*

See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Issuing Material to Production”.

Status

WIP replenishment status. Values are:

- *Dispatched*
- *In Process*
- *Complete*

Item ID

Represents the vendor item ID, if one exists; otherwise, the item ID appears.

Vendor Qty (vendor quantity)

Displays the quantity in the vendor’s unit of measure.

UOM (unit of measure)

Displays the vendor’s unit of measure.

Date Time Dispatched

Displays the date and time of dispatch.

Viewed

Select to hide the Kanban requests once they have been reviewed.

Viewing Details for Vendor-Sourced Replenishment Requests That Are Outstanding or Have Been Dispatched

Access the Vendor Kanban Request Details page.

Vendor Kanban Request Details

Vendor Location:	MAIN		
Kanban ID:	KBI000000000104		
Item ID:	WHEEL		
	Wheel Tire, 700x23	/	LT5002
Storage Area:	SA	AIS1	ROW1 BIN1

WIP RPL Status:	Dispatched		
Vendor Qty:	100.0000		EA
Creation Datetime:	06/27/2000 11:24AM		
Date Time Dispatched:	07/24/2000 3:13PM		
Date/Time Completed:			

Return

Vendor Kanban Request Details page

Vendor Location	Displays the vendor location that replenishes the item.
Kanban ID	Displays a unique identifier used to track replenishment requests.
Item ID	Represents the vendor item ID, if one exists; otherwise, the item ID appears.
Storage Area	Displays the WIP location for delivery of replenishment request.
WIP RPL Status (work in progress replenishment status)	Values are: • <i>Dispatched</i> • <i>In Process</i> • <i>Complete</i>
Creation Datetime	Displays the date that the Kanban ID was created.
Date Time Dispatched	Displays the date and time that the dispatch replenishment request process was run.
Date/Time Completed	Displays the date and time that the replenishment request was completed.

See Also

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, “Defining Items by SetID”

Reviewing Inventory Quantity Balances

Suppliers use this set of pages to review realtime inventory quantity balances for any item defined as a VMI item in the Item Vendor BU Attributes or Schedule Item Attributes pages. When reorder and restock values are maintained, suppliers can quickly identify which items are close to restock levels by sorting based on the quantity closest to the reorder or restock levels.

This section discusses how to:

- View vendor inventory quantity balances.
- Search for quantity balances.
- View inventory quantity balances details.
- View replenishment details for a selected item.

Pages Used to Review Inventory Quantity Balances

Page Name	Object Name	Navigation	Usage
View Inventory Quantity Balances - Select Vendor	WV_SS_VND_LIST	• Manage Supply, View Inventory Qty Balances Click a vendor name on the View Inventory Quantity balances - Select Vendor page. • Manage Supply, Approve Schedules	If more than one vendor is available, select a vendor and review inventory quantity balances for that vendor. See <i>PeopleSoft Enterprise eSupplier Connection 9.0 PeopleBook</i>, “Maintaining Vendor Information,” Maintaining External Users. Note. This page does not appear unless more than one vendor is associated with the user.
View Inventory Quantity Balances - Filter Options	IN_SSQTYBAL_SEL	• If the user is associated with multiple vendors, select a vendor on the View Inventory Quantity Balances - Select Vendor page. • Manage Supply, View Inventory Quantity Balances (if the user isn't associated with multiple vendors.) • Click the Set Filter Options link on the View Inventory Quantity Balances - Quantity Details page.	Search for quantity balances.

Page Name	Object Name	Navigation	Usage
View Inventory Quantity Balances - Quantity Details	IN_SSQTYBAL_SUM	Enter selection criteria on the View Inventory Quantity Balances - Filter Options page, and click the Search button. Click the Show all/Enhanced link on the Remaining Quantity Balances pagelet on PeopleSoft supplier portal.	View the inventory quantity available, the quantity owned by the supplier, and the percent remaining of the quantity available for consigned items.
View Inventory Quantity Balances - Item Replenishment Details	IN_SSQBALITM_DET	Click an Item ID link in any row in the Item ID column on the Quantity Details page.	View replenishment details for a selected item.
View Inventory Quantity Balances - Unit Details	IN_SSQBALBUNIT_DET	Click a name link in any row in the Unit column on the Quantity Details page.	Suppliers can use this page to review additional information about an inventory business unit that appears on the Quantity Details page.

Searching for Quantity Balances

Access the View Inventory Quantity Balances - Filter Options page.

View Inventory Quantity Balances

Filter Options

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Search Criteria

Unit:

Item ID:

Vendor Item ID:

Category:

Percent Remaining: %
 (Percent remaining of the Quantity Available)

[Return to Vendor List](#)

View Inventory Quantity Balances - Filter Options page

Unit Select an inventory business unit to display only the quantities that are associated with that inventory business unit.

Item ID Select an item ID to display only the quantities that are associated with that item ID. Enter a partial value followed by % to select all items that begin

with the partial value. For example, enter *BIKE%* to select all item IDs that begin with *BIKE*.

Only item IDs that have been set up as VMI items on the item setup page for the vendor are available in this list.

Vendor Item ID

Select a vendor ID to display only the quantities that are associated with that vendor item ID. Enter a partial value followed by % to select all vendor item IDs that begin with the partial value. For example, enter *BIKE%* to select all vendor item IDs that begin with *BIKE*.

Category

Select an item category to display only the quantities that are associated with that item category.

Percent Remaining

Enter a percent remaining to display only the quantities at that percent remaining or lower. Enter 0 to display all values at or below the reorder point. Percent remaining equals the difference between quantity available and reorder point, divided by restock value.

This field is beneficial only if reorder point and restock values are maintained for the item.

Search

Enter the search criteria, and click the Search button.

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, “Defining Purchasing Item Information,” Defining Purchasing Item Categories

PeopleSoft Enterprise eSupplier Connection 9.0 PeopleBook, “Maintaining Vendor Information,” Maintaining External Users

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, “Defining Items by SetID,” Defining Configuration Attributes for an Item

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, “Defining Item Control Values”

Viewing Inventory Quantity Balances Details

Access the View Inventory Quantity Balances - Quantity Details page.

View Inventory Quantity Balances								
Quantity Details								
ERNIE'S BIKE SHOP								
Set Filter Options Return to Vendor List								
Item ID	Description	Qty Owned by Vendor	Qty Available	UOM	Reorder Point	Percent Remaining	Unit	Category
FR7001	Bike Frame, Steel	0.0000	298.0000	EA	250.0000	19.20	COLORADO BIKE MFG/OUTDOOR	CYCLING
FR7002	Bike Frame, Aluminium	0.0000	10.0000	EA	10.0000	0.00	COLORADO BIKE MFG/OUTDOOR	CYCLING
FR7003	Bike Frame, Carbon Fiber	0.0000	280.0000	EA	250.0000	12.00	COLORADO BIKE MFG/OUTDOOR	CYCLING

View Inventory Quantity Balances - Quantity Details page

Set Filter Options	Click to select specific filter criteria.
Return to Vendor List	Click to select a different vendor. Available only if the user is associated with more than one vendor.
Qty Owned by Vendor (quantity owned by vendor)	Displays the amount of the item that has not been consumed. This value represents the customer's non-owned quantity.
Qty Available (quantity available)	Displays the subset of the quantity on hand, reflecting the total item quantity that can be used to fulfill demand. Can also include WIP quantities if the Include WIP QTY field is set to <i>Yes</i> on the Item Replenish Attributes page.
Reorder Point	Displays the amount set for replenishment of the item.
Unit	Displays the inventory business unit. Click to access the Unit Details page and review additional information.

Note. A graphical representation of this data can be accessed by viewing the Remaining Quantity Balances pagelet on the PeopleSoft supplier portal. From that pagelet, suppliers access the Quantity Details page by clicking the Show all/Enhancedlink.

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, “Defining Purchasing Item Information,” Defining Purchasing Item Categories

PeopleSoft Enterprise eSupplier Connection 9.0 PeopleBook, “Maintaining Vendor Information,” Maintaining External Users

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, “Defining Items by SetID,” Defining Configuration Attributes for an Item

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, “Defining Item Control Values”

Viewing Replenishment Details for a Selected Item

Access the View Inventory Quantity Balances - Item Replenishment Details page.

View Inventory Quantity Balances

Item Replenishment Details

Return

Unit:

CO Ops

COLORADO BIKE MFG/OUTDOOR

Item ID:

FR7001

Vendor Item ID:

Bike Frame, Steel

Quantity Available:

298.0000

Qty Owned by Vendor:

0.0000

Qty On Hand:

328.0000

Replenishment

Replenish Class:

Replenish Calc Period (Days):

365

Replenish Lead (Days):

Reorder Point:

250.0000

Reorder Quantity:

250.0000

Maximum Quantity:

1000.0000

Safety Stock:

Last Annual Demand:

Economic Order Quantity:

Desired Stock-In Probability:

95.0 %

View Inventory Quantity Balances - Item Replenishment Details page

Qty On Hand (quantity on hand)	Displays the total item quantity in a particular business unit, regardless of the stock's inventory status and storage location. Includes both the item quantity available and the quantity reserved. Does not reflect the total item quantity that can be used to fulfill demand.
Replenishment Class	Displays groupings for items that are subject to automatic replenishment.
Replenish Calc Period (Days) (replenishment calculation period [days])	Displays the number of days used in calculating the item's replenishment values.
Replenish Lead (Days)	Displays the average number of days from placement of the purchase order to receipt of the stock.
Reorder Quantity	Displays the static quantity ordered by automated replenishment events.
Maximum Quantity	Displays the maximum stocking quantity for the item.
Safety Stock	Displays the buffer stocking level to guard against unanticipated surges (or spikes) in average daily demand.
Last Annual Demand	Displays the item's annual demand.
Economic Order Quantity	Displays the fixed-order quantity that determines the amount of an item to be purchased or manufactured at one time.
Desired Stock-In Probability	Displays the percentage of the time to have stock on hand for an item.

See Also

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, “Defining Items by Business Unit,” Defining Item Replenishment Attributes

Creating Collaborative Planning Schedules

With collaborative planning schedules, you can build, maintain and collaborate on the supply plan. Suppliers can access the planning schedules through the supplier portal and approve, and suggest changes to, the schedule. You and the supplier can send each other alerts through email.

See Also

Chapter 3, “Using Collaborative Planning Schedules,” page 15

CHAPTER 3

Using Collaborative Planning Schedules

This chapter provides an overview of collaborative planning schedules and discusses how to:

- Define vendor information for collaborative planning schedules.
- Define and maintain schedule groups and related information.
- Define item information for collaborative planning schedules.
- Create new schedules.
- Maintain current schedules.
- View past schedules.
- Build multiple schedules.
- Dispatch multiple schedules.
- Delete past schedules.
- Enable suppliers to view recently dispatched schedules using the PeopleSoft Supplier Portal.
- Enable suppliers to update and approve schedules.
- Enable suppliers to view past schedules.
- Apply collaborative changes (scheduler).

Understanding Collaborative Planning Schedules

Collaborative planning schedules enable you to take advantage of the internet to improve collaboration with suppliers for planned purchases. Collaborative planning schedules give suppliers up-to-date bucketed information regarding future planned purchases in the form of a schedule which the supplier can suggest changes and then approve. Collaborative schedules can be used in combination with blanket purchase orders (POs), Kanban signals, or vendor managed inventory (VMI) as suppliers delivery mechanism to reduce the need for purchase orders. Collaborative schedules enable you to group items together to consolidate purchase requirements, and also enables you to bucket those requirements into *future* fixed, firmed, and forecast periods. You can also define and manage information to trigger exceptions related to supplier capacity (allocated units over a defined period of time) as well as upside and downside allowable *Flex* for required quantities during the fixed and firmed periods.

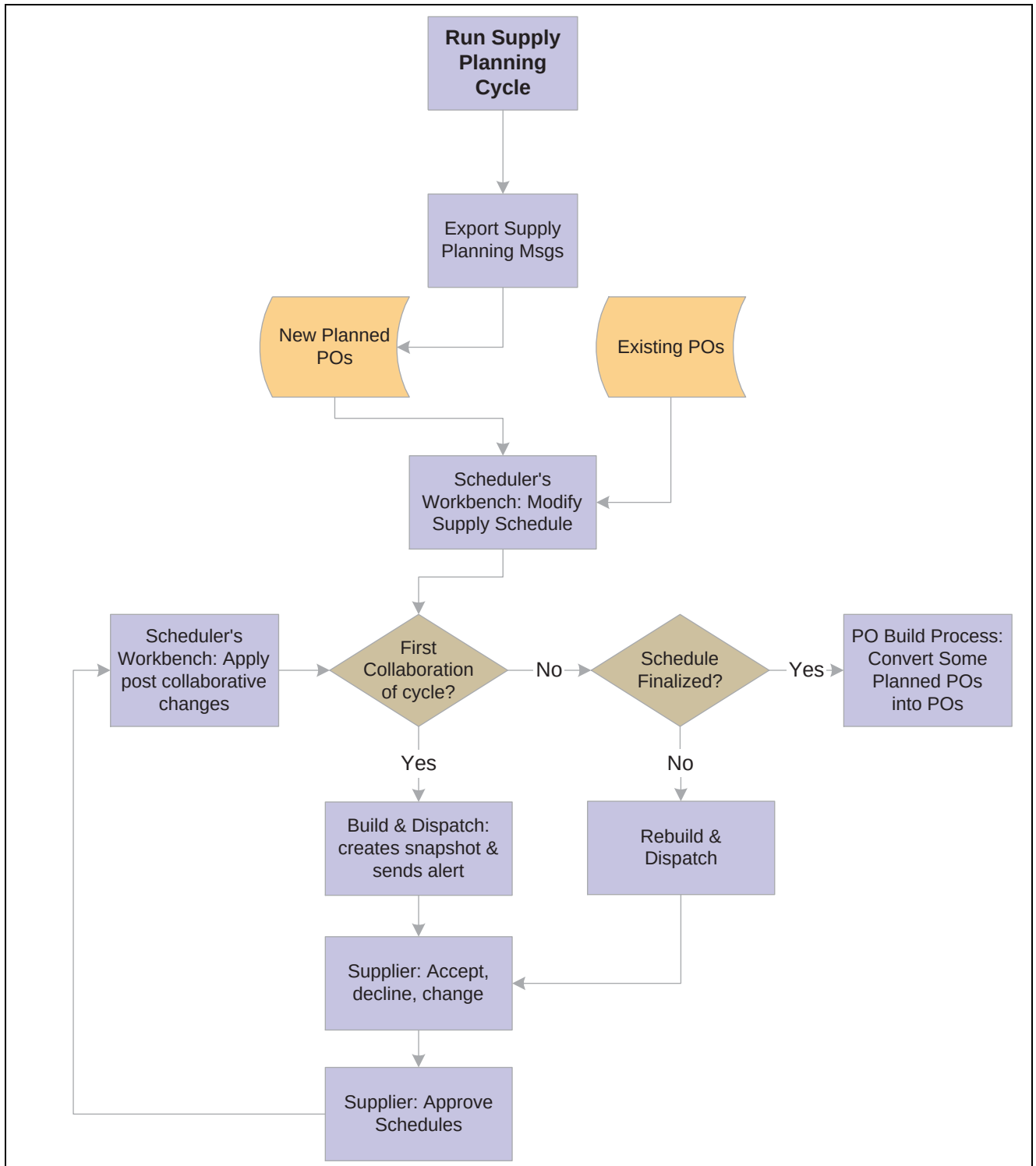
With PeopleSoft collaborative planning schedules, you can:

- Build, review, and maintain a supply plan.
- Dispatch the supply plan to a supplier.
- Collaborate on the supply plan with a supplier, or optionally define the plan as a display-only schedule.

- Enable the supplier to review and approve the collaborative changes to the supply plan, and then be notified when the plan is approved.
- Apply collaborative changes to the supply plan.

PeopleSoft Enterprise Purchasing and PeopleSoft Enterprise Supply Planning provide the data for the supply schedule. Purchasing provides purchase order data and Supply Planning provides planned purchase order data.

This diagram illustrates the basic flow of the collaborative planning schedules process from the creation of the supply schedule to the final approval of the schedule by the supplier.



Collaborative Supply Management process flow

This section lists common elements and discusses:

- Standard buttons.
- Supply schedule statuses.
- Scheduler's Workbench row types.

- Supplier's Approve Schedule row types.

See Also

Appendix A, "Delivered Workflows for Collaborative Supply Management," page 73

Common Elements Used in This Chapter

Apply mode	Refers to the reconciliation Apply mode in the Scheduler's Workbench which enables the scheduler to compare and reconcile approved supplier quantities and suggested changes with actual required quantities (planned orders). Clicking the Apply link for approved schedules in the Scheduler's Workbench - List page enables you access in Apply mode. Within this page proposed quantities are calculated based on supplier feedback and the latest actual required quantities. The scheduler can review and change proposed quantities in the schedule and then directly update the schedule with the click of a button.
Baseline Quantity	Represents the approved quantity which existed for the same range of days for the prior approved schedule. When using Flex within a schedule, this upside or downside flex is measured against the baseline quantity for the day or range of days. See <u>Chapter 3, "Using Collaborative Planning Schedules," Defining Fixed or Firmed Attributes, page 31.</u>
Scheduler	The name of the person within the organization who is responsible for reviewing, building, and dispatching the schedule to the supplier. The scheduler (for example, a buyer or planner) also approves and applies the changes suggested by the supplier.
Schedule Group	A logical grouping of similar vendor items within Collaborative Supply Management.
Supplier's Schedule	The name of the (supplier side) schedule that shows the time-phased quantities that the scheduler proposes. The supplier reviews the schedule that the scheduler dispatches and decides whether to accept, reject, or change the data.
IN Unit (inventory business unit)	The Inventory business unit for which you are purchasing the items. Schedule groups can include supply requirements from multiple Inventory business units.
Period Duration	The period of time for which the system buckets the quantity data for a schedule. Values are <i>Day</i>, <i>Week</i> (default), and <i>Month</i>.
Start Date	The beginning date for a given schedule. Typically this is a future date (for example one week out). When you build a new schedule, the system generates a snapshot of the supply requirements (purchase orders and planned orders) between the start date (beginning date for the collaborative schedule) and the end date.
Number of Periods	The number of periods based on the period duration (days, weeks, or months) for a specific schedule. The maximum number is 52.
Week starts on	The day of the week on which weeks begin for schedules with a period duration of Week.

Row Types	Describes the quantities displayed within a particular row of data within a supplier schedule. Depending on the status of the schedule and the person receiving the schedule (scheduler or supplier), different row types display within a schedule. For example, the Actual Required Qty row type represents the actual purchase orders and planned quantities currently existing for the item or schedule group as shown within the Scheduler's Workbench for a new schedule.
Status	The status of the schedule. For a new schedule, the status is <i>New Schedule</i>. For current schedules, status values are <i>Current</i>, <i>Dispatched</i>, and <i>Approved</i>. For past schedules, item status values are <i>Previous</i> and <i>History</i>.
Created Date/Time	The date and time that the schedule was built.
Dispatched Date/Time	The date and time that the schedule was dispatched.
Approved Date/Time	The date and time that the schedule was approved.
Scheduler's Comment	The comments entered by the scheduler for a specific schedule.
Supplier's Comment	Comments that the supplier enters for a specific schedule. These comments are visible only after the schedule has been approved by the supplier.
Previous Comments	Comments associated with a previous schedule
Include PO Data (include purchase order data)	Select to include the purchase order data in the schedule. If the check box is cleared, only planned purchase order data is included. This option is available only when creating new schedules.
Dispatch	Select to send a built schedule to the supplier for review. You must specify a dispatch method. Options are <i>Email</i> and <i>Other</i> . If you do not select Dispatch, the built schedule retains the status <i>Current</i> .
UOM to View Quantities (unit of measure to view quantities)	Select the unit of measure (UOM) in which to view the quantities on the schedule. The supplier can select either the standard UOM or the vendor default UOM for the schedule summary. If the supplier selects the vendor default UOM and the schedule is a group of items, all items must have the same vendor default UOM. Otherwise, a message displays and the summary information displays in the standard UOM. The vendor default UOM is the default UOM associated with the default vendor location for the specified vendor.
View Only Schedule	Indicates that you want to send the schedule to the supplier, but the supplier cannot change the schedule. The schedule status is set to <i>Approved</i> , and the schedule is dispatched to the supplier.
Show new schedules only	Select to view newly dispatched schedules only. Approved schedules are excluded. This field applies to suppliers only.
Show Std Qty/UOM (show standard quantity unit of measure)	Select to display the various quantity values for the schedule detail sections in terms of the standard UOM. The buyer will automatically be able to view these columns, but the supplier has the option of viewing the summary data in terms of the vendor default UOM. This enables suppliers to view the detail quantities in standard and vendor default UOMs.

Show Order Qty/UOM

(show order quantity unit of measure)

Select to display the various quantity values for the schedule detail sections in terms of the ordering UOM. Since the summary section is displayed in terms of the standard UOM or the vendor default UOM, this enables you to also see the detail quantities in terms of the actual ordering quantity, if it is different.

Show Vendor Qty/UOM

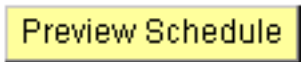
(show vendor quantity unit of measure)

Select to display the various quantity values for the schedule detail sections in terms of the vendor's default UOM.

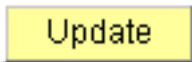
The Scheduler's Workbench always displays the summary quantities in terms of the standard UOM; thus this option enables the scheduler to also view the quantities in terms of the vendor default UOM. The supplier can view the summary quantities in the vendor or standard UOM, so if they are viewing the summary in the standard UOM, this enables suppliers to also see the quantities in terms of the vendor default UOM.

Standard Buttons

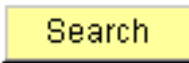
These are buttons that are used throughout this chapter.



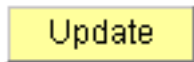
List all the items to be dispatched. This button appears in the dispatch batch process.



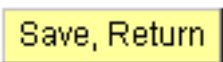
Update in workbenches implies updating the schedule summary with changes made in the detail. In Apply mode, this button appears in the header section of the schedule and it is used to update the entire schedule based on proposed quantities.



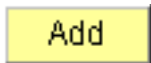
Click to retrieve data after you define the parameters.



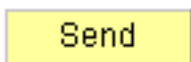
Click to update the quantities on the Summary page for the affected row types.



Click to save the data and return to the Summary page.



Click to add a new planned purchase order. Applicable on the supplier's side.



Click to send the message.



Click to calculate the supply schedule values against capacity or flex requirements.



This red box denotes that there is a violation. For capacity violations, clicking the Calculate Date button will generate the date on which the violation first appears. If the date is within the schedule being maintained, it becomes a link that you can click which takes you to the actual bucket containing this date.



Click the Add button to add a new planned purchase order. Applicable on the scheduler's side.



Click the Delete button to delete a planned order row. You can delete rows only if Supply Planning is *not* installed. Applicable on the scheduler's side.



Click the left scroll arrow to go backward through the bucket columns and save changes.



Click the right scroll arrow to go forward through the bucket columns and save changes.



Click the Approve All button to approve all rows.

You indicate that planned purchase orders are ready to be converted to purchase orders. (Clicking the button is the same as approving the line on the Receive Purchase Messages page.)



Click to reset approval for all rows.

Supply Schedule Statuses

The supply schedule statuses are:

Current

After you build a new schedule, the status is *Current*. The status does not change until you dispatch the schedule. The current schedule is a snapshot of the purchase orders and planned purchase orders. Once a schedule is built, any changes to actual purchase orders or planned purchase orders are not incorporated into the current schedule unless it is rebuilt.

Dispatched and New

The schedule status is *Dispatched* after the you run the Dispatch process to send the schedule to the supplier through email. Once the schedule is dispatched, it becomes available for collaboration with the supplier.

From the supplier's perspective, a schedule dispatched from the scheduler has the status *New*. The status does not change until the supplier approves it.

Supplier Approved

The schedule status is *Supplier Approved* after the supplier approves it by clicking the Approve button on the Approve Schedules - Item Summary page. The scheduler cannot view the supplier's collaboration quantities until the supplier approves the schedule.

Previous

The current schedule's status changes from *Current* to *Previous* when you build a new schedule.

History

The previous schedule's status changes from *Previous* to *History* when you build a new schedule.

Scheduler's Workbench Row Types

When you access a schedule for a particular item or group of items, the system displays several quantity-related rows that pertain to the item or group of items. These quantity-related rows provide the context of the status in the overall schedule. This table describes the row types and the relationship between them (from the scheduler's perspective):

Row Type	Schedule Statuses	Description of Row Type
Actual Required Qty (actual required quantity)	• <i>New</i> • <i>Current</i> • <i>Dispatched</i> • <i>Supplier Approved</i>	The system derives this quantity from the purchase order schedule lines and planned purchase order data. The system populates the planned purchase orders when you run the Export Supply Planning process.
Additional Qty Since Approved	• <i>New</i> • <i>Dispatched</i>	This is the difference between the current requirements and the quantity that was previously agreed on. $(\text{Actual Required Qty} - \text{Previous Approved Qty}) = \text{Additional Qty Since Approved}$
Additional Qty Since Build	• <i>Current</i> • <i>Dispatched</i> • <i>Supplier Approved</i>	This is the difference between the current requirements and the requirements when you built the schedule. $(\text{Actual Required Qty} - \text{Current Required Qty}) = \text{Additional Qty Since Build}$
Previous Required Qty	• <i>New</i> • <i>Current</i> • <i>Dispatched</i> • <i>Supplier Approved</i> • <i>Previous</i> • <i>History</i>	This is the required quantity on the last schedule that you dispatched to the supplier. When you view the previous or history schedule, this row displays the final required quantity for the schedule being reviewed.
Previous Approved Qty	• <i>New</i> • <i>Current</i> • <i>Dispatched</i> • <i>Supplier Approved</i> • <i>Previous</i> • <i>History</i>	This is the quantity on the last schedule that the supplier approved. When you view the previous or history schedule, this row displays the final approved quantity for the schedule being reviewed.
Current Required Qty	• <i>Current</i> • <i>Dispatched</i> • <i>Supplier Approved</i>	This is the required quantity at the time that the schedule was built. The quantity includes any purchase order (if requested) and planned purchase orders.

Row Type	Schedule Statuses	Description of Row Type
Current Approved Qty	<i>Supplier Approved</i>	This is the quantity that the supplier approved.
Shortage/Overage	<i>Supplier Approved</i>	This is the shortage or surplus that you might have with the supplier's approved quantity for a particular bucket (day, week, or month). $(\text{Current Required Qty}) - (\text{Current Approved Qty}) = (\text{Shortage/Overage})$
Short/Over Rolling	<i>Supplier Approved</i>	This is the rolling cumulative total for overage or shortage across all buckets. $(\text{Last Buckets Over/Under Rolling Total}) + (\text{Current Column Over or Under Value}) = (\text{Short/Over Rolling})$
Proposed Apply Qty	<i>Supplier Approved</i>	This is the quantity that is updated to the live data (actual planned orders). The Apply process updates planned orders directly. However, you must perform purchase order updates manually. This row type only appears when you click the Apply link on the schedule list.
Actual Shortage/Overage	<i>Supplier Approved</i>	This is the actual shortage or overage. $(\text{Proposed Apply Qty} - \text{Actual Required Qty}) = (\text{Actual Shortage/Overage})$ This row type appears when you click the Apply link on the schedule list.
Actual Short/Over Rolling	<i>Supplier Approved</i>	This is the rolling cumulative total for actual shortage or overage. This row type appears only when you click the Apply link on the schedule list.

Supplier's Approve Schedule Row Types

When a supplier accesses a schedule for a particular item or group of items, the system displays several quantity-related rows that pertain to the item or group. These quantity-related rows provide the context of the status in the overall schedule. This table describes these row types and the relationship between them (from the supplier's perspective):

Row Type	Schedule Statuses	Description of Row Type
Previous Required Qty (previous required quantity)	• <i>New</i> • <i>Supplier Approved</i> • <i>Previous</i> • <i>History</i>	This is the requested quantity on the last schedule that the scheduler dispatched to the supplier. When you view the previous or history schedule, this row displays the final requested quantity for the schedule that is being reviewed.
Previous Approved Qty	• <i>New</i> • <i>Supplier Approved</i> • <i>Previous</i> • <i>History</i>	This is the quantity on the last schedule that the supplier approved. When you view the previous or history schedule, this row displays the final approved quantity for the schedule that is being reviewed.
Additional Qty Since Approved	• <i>New</i> • <i>Supplier Approved</i>	This is the net change in requested quantity since the last approved schedule.
Current Required Qty	• <i>New</i> • <i>Supplier Approved</i>	This is the current quantity on the requested schedule. The quantity includes any purchase order schedule lines and planned purchase orders. (Previous Required Qty + Additional Qty Since Approved) = (Current Required Qty)
Pending Approval Qty	<i>New</i> (same as Dispatched on the scheduler's Workbench)	This is the quantity that the supplier is willing to provide. By default, it is the current required quantity. Once the schedule is approved, this row type changes to Current Approved Qty.
Current Approved Qty	<i>Supplier Approved</i>	This is the quantity that the supplier approved.

Row Type	Schedule Statuses	Description of Row Type
Shortage/Overage	<i>New</i> <i>Supplier Approved</i>	This is the shortage or surplus that the scheduler will have if the pending approval quantity is accepted. If the schedule status is approved, then: $(\text{Current Approved Qty} - \text{Current Required Qty}) = (\text{Shortage/Overage})$ If the schedule status is dispatched, then: $(\text{Pending Approval Qty} - \text{Current Required Qty}) = (\text{Shortage/Overage})$
Short/Over Rolling	<i>New</i> <i>Supplier Approved</i>	This is the rolling cumulative total for the overage or shortage across all buckets. $(\text{Last Buckets Over/Under Rolling Total}) + (\text{Current Column Over/Under Value}) = (\text{Short/Over Rolling})$

Defining Vendor Information for Collaborative Planning Schedules

This section lists the page used to define vendor information.

Page Used to Define Vendor Information

Page Name	Object Name	Navigation	Usage
Item Vendor	ITM_VENDOR	Items, Define Items and Attributes, Purchasing Attributes, Item Vendor	Establish and update prioritized item-supplier combinations. You can identify any number of vendors and track information (such as the vendor's item ID or status) for each item. You can also specify lead time, price, tolerance, and the vendor's priority level.

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, “Defining Purchasing Item Information,” Defining Purchasing Item Vendor Relationship Attributes and Priorities

Defining and Maintaining Schedule Groups and Related Information

To set up schedule groups, use the Group Capacity component (ITM_CAPACITY_GROUP).

Schedule groups enable you to group similar vendor items together so that a consolidated supplier schedule can be created for the group versus each item. For example, if you purchase several similar items where the only difference is color, and from the suppliers’ perspective require a similar effort (capacity) to produce, you can group these items together to generate a consolidated schedule for planned supply.

This section provides an overview of schedule groups and discusses how to define and maintain schedule groups and related information such as vendors, items, capacity, and flex.

Understanding Schedule Groups

Keep a few things to keep in mind when creating and using schedule groups:

- You can have the same vendor item associated with different Inventory business units in the same group. This enables you to summarize requirements from business units into a single schedule.
- All items in a schedule group should be similar in nature and must share the same unit of measure.
- All items in a schedule group must share the same quantity precision and rounding rules.
- Spot buy items cannot be assigned to a group or item defined as a schedule item.
- Flex information can only be defined for a group or item defined as a *schedule* item.

Pages Used to Define and Maintain Schedule Group and Related Information

Page Name	Object Name	Navigation	Usage
Item/Business Unit	ITM_CAP_GRP_BU	Purchasing, Supplier Schedules, Schedule Group, Item/Business Unit	Define a schedule group of vendor items.
Add Items	ITM_VND_BU_ATT_ADD	- Click the Add Multiple Items button on the Schedule Group page. - Click the Add button on the Item/Vendor/BU attributes page (Item Definition).	Add a single item or multiple items to a schedule group.
Capacity	ITM_CAP_GRP_RANGE, ITM_CAP_RANGE	- Purchasing, Supplier Schedules, Schedule Group, Capacity - Purchasing, Supplier Schedules, Schedule Item Attributes Click the Capacity link to access the Capacity page.	(optional) Define beginning and end dates and maximum capacity for suppliers. Indicates a supplier's ability to deliver the quantity for a particular time frame.
Flex	ITM_CAP_GRP_FLX, ITM_CAP_FLEX	- Purchasing, Supplier Schedules, Schedule Group, Flex - Purchasing, Supplier Schedules, Schedule Item Attributes Click the Capacity link, then the Flex page tab.	Indicate the fences and tolerances for the supplier associated with the schedule group or item Note. This page is available for scheduled items or groups only.

Defining a Schedule Group

Access the Item/Business Unit page.

Item/Business Unit Capacity Flex

SetID: SHARE Group: BRAKES ☐ VMI Item Default ☒ Schedule Item

*Std UOM: EA Each Buyer/Planner: VP1

*Description: Bike Brakes

Vendors Find | View All First 1 of 1 Last

SetID: SHARE Vendor ID: SCM0000004 Location: MAIN

Add Multiple Items

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

Item ID	Business Unit	Description
LT3002	US008	Brakes, Sugishita Road Calipers
LT3003	US008	Brakes, Sugishita Mountain Calipers
LT3004	US008	Brakes, Campani

Save Return to Search Notify Add Update/Display

Item/Business Unit page

Std UOM (standard unit of measure)

Select the unit of measure for the schedule group. This field is unavailable for selection if there are items already associated with the schedule group. All items in a schedule group must have the same standard unit of measure.

Schedule Item

Select to indicate that the group is available to be used to build a supply schedule.

VMI Item Default
(vendor-managed inventory)

Select if the inventory for this item is maintained by the vendor and you want to enable suppliers visibility to the quantity on hand (QOH) for this item by using Collaborative Supply Management. This will be the *default* value for all items to be added to this group, but can be modified for each item. Changing this option does not affect this option for items previously added to the group.

Buyer/Planner

(Optional) Select the buyer or planner (scheduler) who is responsible for this schedule group. This field is used for workflow and email notifications when the supplier approves a schedule.

Vendors

After you've defined a schedule group, you need to associate vendors and vendor locations to the schedule group.

1. Click the Add button to add vendors to the schedule group.
Select the SetID, Vendor ID, and vendor Location.
2. Add items individually or click the Add Multiple Items button to add several items at one time to the same vendor and vendor location.

Note. All items added to the vendor must have the *same* standard UOM as the schedule group.

3. Select an Item ID and Business Unit for each item that you want to add to this vendor.
4. Make sure to save the changes.

See Also

Appendix A, “Delivered Workflows for Collaborative Supply Management,” page 73

Adding Multiple Items to a Schedule Group

Access the Add Items page.

Add Items

Search Criteria

Vendor SetID: SHARE
Vendor ID: SCM0000004
Location: MAIN

Item SetID: SHARE
Item ID:

IN Unit: GBR02
☐ Consigned items only

Associate

Schedule Group: BRAKES

☒ Select All
☐ Clear All

Items

Customize | Find | View All |
First 32-45 of 45 Last

	Vendor SetID	Vendor ID	Vendor Location	SetID	Item ID	Description	Inventory Unit
☐	SHARE	SCM0000004	MAIN	SHARE	BR4400	Yoke, Brake Subassembly	US008
☐	SHARE	SCM0000004	MAIN	SHARE	EX2001	Owners Manual, Professional Road Bike	US008
☐	SHARE	SCM0000004	MAIN	SHARE	EX2000	Owners Manual, Standard Bike	US008
☐	SHARE	SCM0000004	MAIN	SHARE	LT5011	Custom Road Bicycle Wheel	US008
☐	SHARE	SCM0000004	MAIN	SHARE	MT2000	Professional Road Bike, Womans	US008
☐	SHARE	SCM0000004	MAIN	SHARE	LT5010	Custom Road Bicycle	US008
☐	SHARE	SCM0000004	MAIN	SHARE	PS1000	Pedal Set, Custom	US008
☐	SHARE	SCM0000004	MAIN	SHARE	PS1001	Pedal Set Subassembly	US008
☐	SHARE	SCM0000004	MAIN	SHARE	MT3000	Mountain Bike, Womans	US008
☐	SHARE	SCM0000004	MAIN	SHARE	LT5000	Standard Wheel Subassembly	US008
☐	SHARE	SCM0000004	MAIN	SHARE	LT5001	Wheel Tire, 700x20	US008
☐	SHARE	SCM0000004	MAIN	SHARE	LT3006	Brakes, Cantilever Mountain Levers	US008
☐	SHARE	SCM0000004	MAIN	SHARE	LT5003	Wheel Tire, 700x25	US008
☐	SHARE	SCM0000004	MAIN	SHARE	LT5002	Wheel Tire, 700x23	US008

Add Items page

Vendor SetID, Vendor ID, and Location	These fields are default values for the items that you are adding. These values come from the Item/Business Unit page.
Consigned items only	Select to retrieve only the items that are consigned.
Search	Click to retrieve the information based on the selection criteria.
OK	Click to add the selected items to the schedule group or to the schedule item grid and to return to the Group definition page or Item/Vendor/BU attributes page.

Associate

Schedule Group	Select the schedule group with which you want to associate items. When you click OK, the system assigns all selected items to this schedule group. The default value for this field is the group to which you are adding items. However, this same add page can be accessed from the Item/Vendor/BU Attribute page and then you can select a schedule group to be associated with all items selected.
-----------------------	---

Adding Individual Items to a Schedule Group

Access the Item/Business Unit page.

To add items one at a time to a vendor in a schedule group:

1. Click the Add button in the Items group box.
2. Select an Item ID and Business Unit for each item you add.
3. Make sure to save the changes.

Defining Vendor Capacity

Access the Capacity page.

This page can be used to indicate how much capacity (in terms of units) that the supplier can allocate to you during a specific period of time. For example, this capacity can be defined per contractual agreement with the supplier. This capacity is used to manage and identify exceptions for the scheduler and supplier to review and take action.

Capacity

From Date and To Date	Enter the beginning and ending dates. Gaps can exist between capacity date ranges which indicates that no capacity check is to be done for that range of time.
------------------------------	--

Note. Dates cannot overlap.

Maximum Capacity	Enter the capacity that the supplier can fulfill for the time frame specified. Enter 0 if the supplier cannot supply any capacity during the range entered.
-------------------------	---

Note. Specifying a zero quantity in the Maximum Capacity field indicates that the supplier has no capacity during the time frame.

Defining Fixed or Firmed Attributes

Access the Flex page.

Flex page

Fix Attributes and Firm Attributes

Fixed Fence Days or Firm Fence Days

Fixed: Enter the number of days from the start of the schedule that you consider to be the fixed period.

Firm: Enter the number of days after the Fixed period that you consider to be the firm period.

Use Upside % and Percent

Select this check box and enter a percentage that determines the quantity above the baseline quantity that is considered acceptable during the fixed or firm period. If the quantity is changed above this tolerance, a violation is triggered.

Use Downsides % and Percent

Select and enter a percentage that determines the quantity below the baseline quantity that is considered acceptable during the fixed or firm period. If the quantity is changed below this tolerance, a violation is triggered.

Check Fix Tolerances by

Select to indicate how to verify the upside or downside percentages. Options are:

- **Day:** The quantity cannot exceed the tolerance specified for any specific day. In the Scheduler's Workbench, the baseline quantity of the prior schedule for each day is compared against the actual quantities for each day to determine violations.
- **Range:** The quantity cannot exceed the tolerance for the whole range, regardless of each day's fluctuations.

In the Scheduler's Workbench, the baseline quantity of the prior schedule for the range of days is summed and compared against the actual quantities for the range of days to determine violations.

Set to Approve

Select to approve any planned orders within the fixed or firmed period defined during the Apply process. (The Apply link on the Scheduler's Workbench appears after the supplier responds to a schedule). When using a purchase order as the delivery mechanism this enables additional releases against the blanket order while reconciling supplier feedback.

Set Status to Firm

Select to set the planned order status to Firm within the fixed or firmed period defined during the Apply process.

Set to Frozen

Select to freeze planned orders within the fixed or firmed period defined during the Apply process.

Defining Schedule Item Information for Collaborative Planning Schedules

To define schedule item attributes, use the Schedule Item Attributes component (ITM_VND_INVBU).

To include an item as a collaborative planning schedule item, you must first define it. This section discusses how to define schedule item attributes if you want to maintain collaborative schedules by item versus group.

Pages Used to Define Schedule Item Information for Collaborative Planning Schedules

Page Name	Object Name	Navigation	Usage
Item/Vendor/BU attributes	ITM_VND_BU_ATTR	Purchasing, Supplier Schedules, Schedule Item Attributes, Item/Vendor/BU attributes	Use this page when you intend to maintain schedules at the item level versus group level. Prior to defining schedule attributes for an item, the item must have purchasing attributes as well as Inventory business unit attributes defined. 1. Define an item as a scheduled item. 2. Select the appropriate Inventory business unit. 3. Select the Schedule Item option to indicate that this item is available to be used to build a supply schedule. 4. Select a Schedule Priority to indicate the priority ranking of the scheduled item.

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, “Defining Purchasing Item Information,” Defining Purchasing Item Attributes

Defining Schedule Item Attributes

Access the Item/Vendor/BU attributes page.

Item/Vendor/BU attributes

Search Criteria

*Vendor SetID: Vendor ID: Location:

*Item SetID: Item ID:

Schedule Group: **Search**

Add

Item/Vendor/BU Attributes Customize | Find | View All | First 1-3 of 3 Last

Vendor SetID	Vendor ID	Vendor Location	SetID	Item ID	Inventory Unit	Group	Capacity	Schedule Item	Schedule Priority
SHARE	SCM0000004	MAIN	SHARE	LT3002	US008	BRAKES	Capacity	☒	Medium
SHARE	SCM0000004	MAIN	SHARE	LT3003	US008	BRAKES	Capacity	☒	Medium
SHARE	SCM0000004	MAIN	SHARE	LT3004	US008	BRAKES	Capacity	☒	Medium

Item/Vendor/BU attributes

Vendor SetID, Vendor ID, Item SetID, Item ID, and Location

Select to filter the schedule items that you want to review or modify.

When you define new schedule items, you can enter the header criteria such as set ID and vendor ID to simplify data entry.

Note. Prior to adding items for a specific vendor, select the vendor ID and click the Search button to ensure that the item does not already exist

Search button

Click to retrieve the information based on the selection criteria.

Add button

Click this button to add items.

See [Chapter 3, “Using Collaborative Planning Schedules,” Adding Individual Items to a Schedule Group, page 30.](#)

Schedule Item and VMI Item (vendor managed item)

These check boxes are available only if you are accessing this page from the Item/Vendor/BU attributes page. (This page is also used to add individual items to schedule groups or to add individual items.)

Select to indicate if you want all items selected to be schedule items or vendor managed (VMI) items. The VMI option indicates the item quantity on hand information will be made available to the supplier by using an internet browser.

Note. You must save the component before you can add any items.

Adding Items

Vendor SetID, Vendor ID, and Location

These fields are default values from the Item/Business Unit page for the vendor and vendor location that you are adding items.

Consigned items only

Select to retrieve only the items that are consigned.

Search

Click to retrieve the information based on the selection criteria.

OK

Click to add the selected items to the schedule group or to the schedule item grid and to return to the Group definition page or Item/Vendor/BU attributes page.

Items Tab

Select the Items tab.

Group	Select the appropriate existing schedule group, if you want to associate the item to a group.
Capacity	Click to access the Capacity and Flex pages, where you can view and change the maximum quantity and fixed and firmed periods for the vendor. If a group is specified, the Capacity link will take you to the capacity or flex information for the group.
Note. If no group is specified for the item, click the Capacity link for capacity or flex information for the item.	
See Chapter 3, “Using Collaborative Planning Schedules,” Defining and Maintaining Schedule Groups and Related Information, page 26.	
Schedule Item	Displays whether the item is currently enabled for collaborative planning schedules.
Schedule Priority	Displays the priority for each item. This field is also used to filter the items for the schedule that you are creating. For example, you might collaborate on a high-priority item first.
Buyer	Displays the buyer for each item. The system uses the buyer associated to the schedule item for workflow notifications and email notifications when the supplier approves a schedule.
VMI Item (vendor-managed item)	Select to indicate that inventory for this item is managed by the supplier, and that you intend to make available quantity on hand for this item to the supplier by using an internet browser. Since quantity on hand displayed to the supplier is at the Inventory business unit level, PeopleSoft assumes this item is single-sourced to one vendor.

Note. You cannot delete a row (item) if there are current or dispatched schedules for that item.

Creating New Schedules

Use the scheduler’s workbench to create a new schedule or change an existing schedule.

This section discusses how to:

- Define Scheduler’s Workbench search parameters.
- View the schedule list.
- View the item or group summary row types.
- Edit and view actual item quantities.
- Review and modify previous approved quantities.
- Build a supply schedule.
- Send email to internal employees or to suppliers.

Common Elements Used in This Section

Due Date	Displays the date that the purchase order schedule line or planned purchase order is due. When you add a new planned order, the default due date relates to the period duration. If the period duration is <i>Week</i>, then the default due date is the first valid receiving date for that week, beginning on Sunday. If the period duration is <i>Month</i>, then the default due date is the first receiving day of the month. If the period duration is <i>Day</i>, then the default due date is the date to which you navigate. The receiving days are defined in the closure calendar.
Time Due	Enter the time that the purchase order schedule line or planned purchase order is due. This is an optional field. The default is blank.
Quantity	Displays the current quantity required for the PO schedule line or the planned PO. This number can be changed.

Pages Used to Create New Schedules

Page Name	Object Name	Navigation	Usage
Scheduler's Workbench - Selection Criteria	PO_BUY_SEL	Purchasing, Supplier Schedules, Scheduler's Workbench, Selection Criteria	Retrieve schedule data.
Scheduler's Workbench - List	PO_BUY_LIST	Click the Search button on the Scheduler's Workbench - Selection Criteria page	View all the items or groups that can have a schedule built.
Scheduler's Workbench - Summary	PO_BUY_ITEM_SUM	Click the item ID or group link on the Scheduler's Workbench - List page.	View, edit, and build a schedule.
Comments	PO_BUY_ITM_COMMENT	Click the Edit Comment link on the Scheduler's Workbench - Summary page.	View or edit comments. Both the scheduler and supplier can use this page.
Build Schedule Options	PO_BUILD_RUN_SP	Click the Build button or the Rebuild button on the Scheduler's Workbench - Summary page.	Build and dispatch a schedule.
Email Message	WV_PE_EMAIL	Click the Send E-mail link on the Summary page.	Send an email message to the supplier or to internal employees.

Defining Scheduler's Workbench Search Parameters

Access the Scheduler's Workbench - Selection Criteria page.

Selection Criteria | **List** | **Summary**

☒ **Create New Schedule**

*Create By: ☐ Item ☒ **Group**

*Start Date: 06/09/2005 *Number of Periods: 10

☒ Include PO Data Week starts on: Thursday

☐ **Maintain Current Schedules**

☐ Show Approved Schedules with Changes only

☐ **View Past Schedules**

From: 01/01/2000 To: 06/09/2005

*Period Duration: Week

Filter

Vendor: ID:

Vendor Location: Buyer/Planner:

SetID: SHARE Group: BRAKES

☐ Show Schedules with Capacity Violations only ☐ Show Schedules with Flex Violations only

☐ Pre-Load Capacity/Flex data

Search

Scheduler's Workbench - Selection Criteria page (for groups)

Create New Schedule

Select to display a list of items or groups that are available for building a schedule. New schedules can be created for items or groups if no schedules exist with a status of *Current* or *Dispatched*. Any existing schedules in current or dispatched status must be approved by the supplier or deleted by the scheduler before a new schedule can be created.

Maintain Current Schedules

Select to retrieve schedules for items or groups with the status *Current* (built but not yet dispatched), *Dispatched*, or *Supplier Approved*.

See [Chapter 3, "Using Collaborative Planning Schedules," Maintaining Current Schedules, page 46.](#)

Show Approved Schedules with Changes only

Select to retrieve dispatched schedules that have been approved by the supplier including those that may have supplier changes. Once a schedule has been approved by the supplier, the scheduler can use the Apply link to reconcile and update the schedule based on supplier feedback.

View Past Schedules

Select to view past schedules.

See [Chapter 3, "Using Collaborative Planning Schedules," Viewing Past Schedules, page 48.](#)

Filter

The filter options within the search page vary slightly depending on whether you are creating a new schedule or modifying a current schedule, and whether you are maintaining schedules by item or by group.

Vendor, Vendor ID, Vendor Location, and SetID	Select to specify the selection criteria. Use these fields if you are creating or modifying a schedule created by item or group.
IN Unit (inventory unit) Category, and Schedule Priority	Select these additional filter options when you create or modify a schedule by item.
Item ID	Select when you create or modify a schedule by item. The Item ID field appears in the Filter group box if you are creating a new schedule by item. In addition, select to include items that are not associated with a schedule group.
Group	Select to filter based on schedule group. The Group field appears in the Filter group box if you are creating a new schedule by group. Only groups with scheduled items are available for selection.
Show Schedules with Capacity Violations only	Select to include any schedules that have capacity violations. A capacity violation occurs when any capacity period overlaps with any portion of the schedule and the schedule is over capacity (more cumulative PO and planned quantities exist than the capacity allows).
Show Schedules with Flex Violations only	Select to include any schedules that have flex violations. A flex violation occurs when the actual schedule values (PO and planned quantities) exceed the upside or downside percentage of baseline quantities for the specific day or range of days. The baseline values used are the approved quantities from the previous schedule.
Pre-Load Capacity/Flex data	Select to pre-load or calculate all the capacity and flex information for the search criteria. This option is applicable only if you are not selecting capacity violations or flex violations. Selecting this option will help improve performance when going back and forth from the List page to the Summary page for multiple schedules. Otherwise, once you are on the Summary page, you can calculate the capacity and flex information for each schedule one at a time.
Search	Click to retrieve the selected criteria.

Viewing the Scheduler's Workbench List

Access the Scheduler's Workbench - List page.

Selection Criteria List Summary						
Customize Find View All First 1-2 of 2 Last						
Schedules Description [Icon]						
Item ID	IN Unit	Vendor ID	Vendor Name	Vendor Location	Category	Schedule Priority
FR7001	US008	SCM0000004	ERNIE'S-001	MAIN	CYCLING	Medium
FR7003	US008	SCM0000004	ERNIE'S-001	MAIN	CYCLING	Medium

Scheduler's Workbench - List page: Schedules tab

Depending on the mode (New, Current, or Past) that you select on the Scheduler's Workbench - Selection Criteria page, the system retrieves a list of items and groups.

Group

Click the Group link to access the Scheduler's Workbench - Summary page.

For New schedules: If the Group option is selected, the system lists all schedule groups available for schedule creation. This includes groups that have no schedules as well as those where the last schedule is in the Approved status.

Item ID

Click an item ID to access the Scheduler's Workbench - Summary page.

For New schedules: If the item option is selected on the Scheduler's Workbench - Selection Criteria page, the system lists all items that do not belong to a schedule group and are available for schedule creation. This includes items that have no schedules as well as those where the last schedule is in the Approved status.

Note. For all other schedule modes, you may see both item and group links.

Viewing the Scheduler's Workbench Summary Page

Access the Scheduler's Workbench - Summary page.

Selection Criteria		List		Summary																									
Vendor ID:	SCM0000004	ERNIE'S BIKE SHOP		Location: MAIN																									
Group:	BRAKES	Bike Brakes		Send E-mail																									
Std UOM:	EA	Period Duration: Week																											
Status:	New Schedule	Week starts on: Tuesday																											
Review/Update your Actual Required Quantity and then click the Build button to create your schedule.																													
Summary Week 1 - 7 Week 8 - 10 Build <table border="1"> <thead> <tr> <th></th> <th>05/31/2005</th> <th>06/07/2005</th> <th>06/14/2005</th> <th>06/21/2005</th> <th>06/28/2005</th> <th>07/05/2005</th> <th>07/12/2005</th> </tr> </thead> <tbody> <tr> <td>Previous Required Qty</td> <td>370.0000</td> <td>456.0000</td> <td>225.0000</td> <td>250.0000</td> <td>270.0000</td> <td>250.0000</td> <td>250.0000</td> </tr> <tr> <td>Previous Approved Qty</td> <td>370.0000</td> <td>456.0000</td> <td>225.0000</td> <td>250.0000</td> <td>270.0000</td> <td>250.0000</td> <td>250.0000</td> </tr> </tbody> </table>							05/31/2005	06/07/2005	06/14/2005	06/21/2005	06/28/2005	07/05/2005	07/12/2005	Previous Required Qty	370.0000	456.0000	225.0000	250.0000	270.0000	250.0000	250.0000	Previous Approved Qty	370.0000	456.0000	225.0000	250.0000	270.0000	250.0000	250.0000
	05/31/2005	06/07/2005	06/14/2005	06/21/2005	06/28/2005	07/05/2005	07/12/2005																						
Previous Required Qty	370.0000	456.0000	225.0000	250.0000	270.0000	250.0000	250.0000																						
Previous Approved Qty	370.0000	456.0000	225.0000	250.0000	270.0000	250.0000	250.0000																						
Quantities contain planned orders																													
Comments Scheduler's Comment: Initial schedule for 6/15, 10 weeks out. Supplier's Comment:																													

Scheduler's Workbench - Summary page

Depending on the Mode (New, Current, or Past) you select on the filter page pertinent row types are displayed in the summary. The quantities shown with each row type can be clicked to review the details. When creating a new schedule, the actual required quantities are used as the basis for the schedule once built. These quantities are derived from planned orders and purchase orders. Certain row types such as Actual Required Quantity enable you to modify underlying planned required quantities and dates for the schedule.

Note. You can click any quantity link to navigate to the item details.



When working with a new schedule and if you are satisfied with the actual required quantities for the suppliers, click this button to display the Build Schedule Options page which enables building and dispatching the schedule online.

See Chapter 3, “Using Collaborative Planning Schedules,” Scheduler’s Workbench Row Types, page 21

Checking and Calculating Capacity Information

The grid displays all date ranges defined for the group or item in the capacity setup that overlap the start and end dates of the schedule being viewed.



Click the Calculate Capacity/Flex button to calculate the capacity for this schedule. If the capacity and flex information has already been calculated, this button will change to Recalculate Capacity/Flex. As changes are made to the item details, the capacity/flex information is NOT automatically updated. Clicking this button will save any pending detail changes and recalculate the capacity and flex information.



This red box denotes that there is a violation. Clicking the Calculate Date Date button will generate the date on which the violation first appears. If the date is within the schedule being maintained, it becomes a link that you can click which takes you to the actual bucket containing this date.

Actual Qty (actual quantity) This column includes the PO schedule quantities for open and closed POs, and planned orders for the date range of the capacity bucket. This actual quantity is compared against the capacity quantity identified if you are ordering over the agreed upon supplier capacity.

In Apply mode, this quantity can be changed to compare against the proposed quantities so that you can simulate changes prior to applying changes to the schedule.

Note. On the supplier side, the capacity quantity will be compared against the pending approval quantity so that a supplier can view capacity to suggested changes on the supplier side.

Date Exceeded

If there is a capacity violation, you can click the Calculate Date button to generate the exact date when the quantity exceeded the defined capacity quantity. If the date falls within the schedule start and end range, then the date will be a link that will enable you to navigate into the corresponding bucket (period) containing that date in the Actual Required Qty row type.

Calculating Flex Information

Click the Calculate Capacity/Flex button to calculate flex information for the schedule.

▼ Capacity

Customize | Find | View All | 

First 1-2 of 2 Last

From	To	Capacity	Actual Qty		Date Exceeded	Calculate Date
06/13/2005	06/20/2005	40.0000	100.0000	■		
06/21/2005	06/28/2005	120.0000	100.0000			

▼ Flex

Period: Fixed06/09/2005To: 06/15/2005RangeUpside %: 5.00Downside %: 5.00

Customize | Find | View All | 

First 1 of 1 Last

Flex DetailsMore Calculations

Start Date	End Date	Baseline Qty	Actual Qty		Over/Under Flex Qty	Maximum Upside Qty	Minimum Downside Qty
06/09/2005	06/15/2005	0.0000	50.0000	■	50.0000	0.0000	0.0000

Period: Firmed06/16/2005To: 06/29/2005RangeUpside %: 10.00Downside %: 10.00

Customize | Find | View All | 

First 1 of 1 Last

Flex DetailsMore Calculations

06/16/2005	06/29/2005	Baseline Qty	Actual Qty		Over/Under Flex Qty	Maximum Upside Qty	Minimum Downside Qty
06/16/2005	06/29/2005	0.0000	200.0000	■	200.0000	0.0000	0.0000

Calculate Capacity/Flex - : Flex grid: Flex Details tab

The Flex collapsible section displays both Fixed and Firmed periods. The header information displays the period type (*Fixed* or *Firmed*), the date range for the period specific to this schedule, whether tolerance is by *Day* or *Range*, and the upside or downside percentages defined for this item or group.

The contents of the each grid displays any days or ranges which are in flex violation where the *actual* required quantity for the schedule exceeds the baseline quantities set from the prior schedule.

In Apply mode, you can also compare baseline values versus *proposed* apply quantities to factor in any suggested changes by the supplier.

Flex Details Tab

Select the Flex Details tab.

Date

If the period is defined as *by day*, then each day within the range is displayed in the grid separately.

Note. Only the days where there are quantities defined are displayed; days with a zero quantity are not displayed.

Start Date or End Date

If the period is defined as *by range*, then there will be one row in the grid with the entire range together.

Baseline Qty (baseline quantity)

The quantity for the given day or range that was approved for the prior schedule.

Actual Qty (actual quantity)

The current actual quantity (planned orders and POs) for the given day or range.

Over/Under Flex Qty (over or under flex quantity)

This column displays the difference between the actual quantities and the baseline quantity $\pm$ Flex upside or downside quantity (quantity over or under the flex).

This value will be highlighted if the flex has been exceeded for a fixed or firmed range. This value indicates how far over or under the acceptable flex quantity the buyer is for that specific date. This value is 0 if the buyer is within the flex tolerance quantity. When violating flex on the downside, this value will be negative. This value is useful to indicate the quantity that needs to be adjusted to meet flex requirements.

Maximum Upside Qty
(maximum upside quantity)

This quantity is the *total* acceptable upside quantity for the day or fixed or firmed range (based on setup options). This quantity is calculated based on the (baseline value + the % upside × the baseline value). This value is displayed independent of a violation and is useful to see the total maximum quantity that can be ordered.

Minimum Downside Qty (minimum downside quantity)

This quantity is the *total* acceptable downside quantity for the day or fixed or firmed range (based on setup options). This quantity is calculated based on the (baseline value – the % downside × the baseline value). This value is displayed independent of a violation and is useful to see the total minimum quantity that should be ordered.

More Calculations Tab

Select the More Calculations tab.

Upside (Delta) Qty (upside delta quantity)

This column displays the *delta* acceptable upside quantity for the day or fixed or firmed range (based on setup options). This quantity is calculated based on the maximum quantities – actual quantities. This quantity is useful to determine if additional quantities can be ordered.

Downside (Delta) Qty
(downside delta quantity)

This column displays the *delta* acceptable downside quantity for the day or fixed or firmed range (based on setup options). This quantity is calculated based on the actuals quantities – minimum quantity. This quantity is useful to determine if fewer quantities can be ordered.

Over/Under Baseline %

This column displays the current over or under percentage based on actuals versus baseline. For example, if the baseline quantity is 100, and actual quantity is 105, then the percentage is 5. This percentage is useful for the buyer to see how much flex is being utilized based on actuals.

When the actual quantities are equal to the baseline quantities, this value is zero.

Editing and Viewing Actual Item or Group Quantities

Access the Scheduler's Workbench - Summary page and click an Actual Required Qty bucket for one of the periods in the schedule. This expands the details for the quantity bucket below the summary page.

The screenshot displays a software window titled "Item Detail - Actual Required Qty". At the top, it shows "Start Date: 07/07/2005", "End Date: 07/13/2005", and "Period Duration: Week". Below this is a navigation bar with "Customize", "Find", "View All", and "First 1 of 1 Last" buttons. The main area contains a table with the following columns: Type, PO No., Due Date, Time Due, Quantity, Frozen, Approved, and Plan Status. The first row shows "New" in the Type column, an empty PO No., "07/07/2005" in Due Date, "12:00:00AM" in Time Due, an empty Quantity field, and "Planned" in Plan Status. There are also "Frozen" and "Approved" checkboxes, both of which are unchecked.

Item Detail - Actual Required Qty group box

Note. These columns are visible only for groups.

IN Unit and Item	These fields are used to filter the details to display only one particular item (from within the group) and its related information. In addition, these values can be used as defaults when adding new planned orders into the grid for a specific Inventory business unit or item.
Total Quantity	This display-only field reflects the total quantity for the specific Inventory unit and the item.
Refresh button	This button uses the filters entered (IN Unit and Item) to filter the rows that show appear in the detail section. It also refreshes the total quantity for the specific time period and based on the IN Unit and Item values.

Schedule Navigation and Updates

The Item Detail and Schedule Summary pages work together so that changes to the item details (such as quantity and date) can be updated as part of the navigation. For example, you can update quantities in the details and navigate by clicking other buckets in the summary, or by using the << >> navigation buttons in the schedule detail to traverse bucket by bucket.

The Update button can be also used to update the Required Actual Qty without navigating elsewhere within the component.

Note. There is no Save button on this component. Therefore, updates are being made to the actual planned order quantities as you change and navigate within the component or by clicking the Update button.

Date/Qty Details Tab

Select the Date/Qty Details tab.

PO No.	Displays the purchase order ID that you include in the schedule. For a planned purchase order, the order ID will be blank, and the Type column will be <i>New</i> .
Due Date, Time Due, and Quantity	Enter values for these fields.
Frozen	If this check box is selected, then the order or operation is frozen, and Supply Planning does not automatically reschedule the line.
Approved	If this check box is selected, the planned PO is approved and is ready to be converted to a purchase order. (Behaves the same as if you had approved the line on the Receive Purchase Messages page.)
Plan Status	The status of the planned purchase order. Options are <i>Canceled</i>, <i>Firmed</i>, and <i>Planned</i>. If you add a new planned purchase order, the default value is <i>Planned</i>. If the row is a PO, this field is blank. If the status of a planned order is <i>Canceled</i>, Supply Planning deletes the order during the next planning cycle and prevents the row from appearing in the workbench. If the status of a planned order is <i>Firmed</i>, Supply Planning retains the planned purchase order.

Vendor Tab

Select the Vendor tab.

Vendor ID and Vendor Location

Enter a new vendor ID or location here if necessary. These fields can be used to push required quantities between vendors schedules. The system updates the total quantity when you click the Update button. Once you move a quantity to a new vendor ID or location, you must maintain the schedule separately for the alternative vendor or location.

Description Tab

Select the Description tab.

Note. This tab appears only when viewing a Group schedule, since groups can contain multiple items.

This tab appears for new schedules based on groups. Use it to view the item description.

Configuration Code Tab

Select the Configuration Code tab.

This tab appears only if an item is a configured item. Use it to view the configuration code.

Reviewing Previous Approved Quantities

Access the Scheduler's Workbench - Summary page and click a Previous Approved Quantity bucket for a period.

Item Detail - Previous Approved Qty

Start Date: 06/09/2005 End Date: 06/15/2005 Period Duration: Week

☐ Show Vendor Qty/UOM Columns ☐ Show Order Qty/UOM Columns

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

Type	PO No.	Original Due Date	Original Due Time	*Due Date	PO Unit	Line	Sched	Dist	PO Status	Frozen	Revision
New				06/09/2005	US008	1	1	1		☐	AA

Comments

Scheduler's Comment:

[Edit Comments](#)

[Previous Comments](#)

Item Detail - Previous Approved Qty group box

Date/Qty Details Tab

Select the Date/Qty Details tab.

The system displays schedule information concerning the Inventory unit, item, original due dates and times, and current standard and confirmed standard quantities for the schedule.

PO Details Tab

Select the PO Details tab.

The system displays PO information regarding the schedule.

Building a Supply Schedule

Access the Build Schedule Options page.

Build Schedule Options

Vendor ID: SCM0000004 Location: MAIN Include PO Data ☒ Week starts on: Thursday

Item ID: FR7001 Bike Frame, Steel

Start Date: 06/09/2005 End Date: 08/17/2005

Dispatch Flag ☐ Dispatch Email Address:

☐ Email Scheduler Email Address: jojodakes2@yahoo.com

☒ Other

View Only Schedule ☐

OK Cancel

Build Schedule Options page

In addition to building schedules online from the Scheduler's Workbench, you can also build schedules in batch. This provides an automated method to build and dispatch multiple schedules to suppliers.

Dispatch Flag

Select to determine how the system dispatches the schedules to the supplier. Options are:

- *Email*: You must enter the dispatch email address of the supplier.
- *Other*: You can notify the supplier by telephone, fax, or some other means of communication.

Dispatch Email Address

Enter the email address of the supplier. By default, the field contains the email address for the ordering location of the vendor. If the field is blank, then the Dispatch process cycles through all vendor locations associated with all purchase orders for the schedule and concatenates all the ordering locations' email addresses together.

Scheduler's Email Address

Enter the email address of the scheduler. This email address is the default when the supplier sends an email.

The email address is also used to send a notification to the scheduler when the supplier approves the schedule. If the schedule group or item has a buyer ID associated to it, the email address defined for this buyer ID will be used as the default.

Sending Email to Internal Employees or to Suppliers

Access the Email Message page.

Email Subject

Enter the subject of the email. The default is *View Supplier's Schedule*.

Message

Enter the text of the message. The message text includes a link to the Scheduler's Workbench - Summary page. For the supplier to access that page, you must first grant the supplier security permissions.

If you have enabled Workflow, the supplier is notified that the schedule has been dispatched.

See Also

Appendix A, “Delivered Workflows for Collaborative Supply Management,” page 73

Maintaining Current Schedules

A current schedule is one which has been built and may have a status of *Current*, *Dispatched*, or *Approved*.

This section discusses how to:

- View the item summary row types for a current schedule.
- Review current required quantities.
- Review and edit current approved quantities.
- Rebuild schedules.
- Dispatch supply schedules.

Pages Used to Maintain Current Schedules

Page Name	Object Name	Navigation	Usage
Scheduler's Workbench - Selection Criteria	PO_BUY_SEL	Purchasing, Supplier Schedules, Scheduler's Workbench, Selection Criteria	Retrieve current schedule data by selecting the Maintain Current Schedules option.
Scheduler's Workbench - List	PO_BUY_LIST	Purchasing, Supplier Schedules, Scheduler's Workbench, List	View all the schedules that match the criteria.
Scheduler's Workbench - Summary	PO_BUY_ITEM_SUM	Click the link for an item ID or group on the Scheduler's Workbench - List page.	View, edit, and rebuild a schedule.
Comments	PO_BUY_ITM_COMMENT	Click the Edit Comments or Previous Comments link on the Scheduler's Workbench - Summary page.	View or edit comments. Both the scheduler and supplier can use this page.
Build Schedule Options	PO_BUILD_RUN_SP	Click the Build button or the Rebuild button on the Scheduler's Workbench - Summary page.	Build and dispatch a schedule.
Email Message	WV_PE_EMAIL	Click the Send E-mail link on the Scheduler's Workbench - Summary page.	Send an email message to the supplier or to internal employees.

Viewing the Item Summary Row Types for a Current Schedule

Access the Scheduler's Workbench - Summary page.

A current schedule can have these statuses:

- Current
- Dispatched
- Supplier Approved

See [Chapter 3, “Using Collaborative Planning Schedules,” Scheduler’s Workbench Row Types, page 21.](#)

Reviewing Current Required Quantities

Access the Scheduler’s Workbench - Summary page. Click one of the current required quantities.

Item Detail - Current Required Qty

Note. The Item Detail - Current Required Qty collapsible group box appears only after you click one of the links.

Current Std Qty (current standard quantity) Displays the current required quantity based on the standard UOM.

Reviewing and Editing Current Approved Quantities

Access the Scheduler’s Workbench - Summary page. click one of the links for current approved quantities.

Note. The Item Detail - Current Approved Qty collapsible group box appears only after you click one of the links. This row type only appears after a schedule has been approved by the supplier.

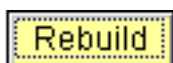
Original Due Date Displays the original due date of the purchase order schedule line or the planned purchase order.

Original Due Time Displays the original due time of the purchase order schedule line or the planned purchase order.

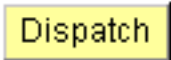
Rebuilding Schedules

Access the Scheduler’s Workbench - Summary page.

Depending on the status of the schedule, one of these buttons is available:



Click to rebuild if the schedule has the status *Dispatched*, *Current*, or *Approved*. If you rebuild a schedule that has been previously dispatched, the system overwrites the dispatched schedule. The same start and end dates are used for the schedule.



Click to build if the schedule has the status of *Current*. If the status is *Current*, the schedule has not yet been dispatched to the supplier.

Dispatching Supply Schedules

Access the Dispatch Schedule Options page.

OK button Click to dispatch the schedule.

Cancel Click to cancel dispatching the schedule.

See [Chapter 3, “Using Collaborative Planning Schedules,” Building a Supply Schedule, page 45](#).

Viewing Past Schedules

This section discusses how to review past quantities.

Pages Used to View Past Schedules

Page Name	Object Name	Navigation	Usage
Scheduler's Workbench - List	PO_BUY_SEL	Purchasing, Supplier Schedules, Scheduler's Workbench, Selection Criteria Select View Past Schedules on the Selection Criteria page and click Search.	View all the items with the status <i>Previous</i> or <i>History</i> .
Scheduler's Workbench - Summary	PO_BUY_LIST	Click a link for a previous approved quantity on the Scheduler's Workbench - Summary page.	View past schedules.

Reviewing Past Quantities

Access the Scheduler's Workbench - Summary page. Click the link for a previous approved quantity.

Note. The Previous Approved Qty collapsible group box appears only after you click one of the links.

Building Multiple Schedules

This section discusses how to run the Supplier Collaboration (PO_DISPCOLLB) process to build multiple supply schedules.

Page Used to Build Multiple Schedules

Page Name	Object Name	Navigation	Usage
Build Collaboration Schedule	PO_BUILD_COLLAB	Purchasing, Supplier Schedules, Build Schedules, Build Collaboration Schedule	Build multiple schedules based on selection criteria and, if you want, dispatch the schedules.

Running the Build Multiple Supply Schedules Process

Access the Build Collaboration Schedule page.

Build Collaboration Schedule

Run Control ID: ADHOC

Language: English

Create By: ☒ Item ☐ Group

SetID: SHARE Item ID: FR7001

IN Unit: US008 Category: CYCLING

Vendor SetID: SHARE Vendor ID: SCM0000004 Location: MAIN

Scheduler Email Address: peoplesoft@peoplesoft.com

Report Manager

Process Monitor

Run

Schedule Parameters

Schedule Start: 0 days from today

From Date: 05/31/2005

Number of Periods: 3

Period Duration: Month

To Date: 07/31/2005

Week starts on: Sunday

Include PO Data ☒

Dispatch Parameters

☒ Dispatch

Email Address:

☐ Email ☒ Other

☐ View Only Schedule

Build Collaboration Schedule page

Create By Select the method to create the schedule. Options are *Item* and *Group*.

Schedule Parameters

Schedule Start Enter the number of days before or after the current date for the starting date of the schedule. Enter a negative number for days before or a positive number for days after the current date. Enter 0 if you want the schedule to start on the current date.

From Date	Displays the starting date of the schedule. The system calculates this date by adding the value in the Schedule Start field to the current date.
Number of Periods	Enter the number of periods in the schedule. The maximum number is 52.
Period Duration	Select the length of time used to establish the periods. Values are <i>Day</i> , <i>Week</i> (the default), and <i>Month</i> . When you specify the number of periods, the system uses this duration.
To Date	Displays the last date for which the system collects schedule data. The system calculates this date based on the values for number of periods, period duration and from date.
Include PO Data (include purchase order data)	Select to have the system include both purchase order data and planned purchase order data. If the check box is cleared, only planned purchase order data is included in the schedule.

Dispatch Parameters

Select the parameters for dispatching the schedule.

See [Chapter 3, “Using Collaborative Planning Schedules,” Dispatching Supply Schedules, page 48](#).

Dispatching Multiple Supply Schedules

This section discusses how to run the Supplier Collaboration (PO_DISPCOLLB) process to dispatch multiple supply schedules.

Page Used to Dispatch Multiple Supply Schedules

Page Name	Object Name	Navigation	Usage
Dispatch Schedule	PO_BUILD_COLLAB	Purchasing, Supplier Schedules, Dispatch Schedules, Dispatch Schedule	Dispatch multiple schedules to the supplier. Display all the schedules that are pending dispatch.

Running the Dispatch Multiple Supply Schedules Process

Access the Dispatch Schedule page.

Dispatch Schedule

Run Control ID: ADHOC

Language: English

Create By: ☒ Item ☐ Group

SetID: SHARE

Item ID: FR7002

IN Unit: US008

Category: CYCLING

Vendor SetID: SHARE

Vendor ID: SCM0000004

Location: MAIN

Scheduler Email Address: peoplesoft@peoplesoft.com

Schedules to be dispatched

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

Schedules

Details

Group	Vendor SetID	Vendor Name	Location

Dispatch Parameters

Method: ☐ Email ☒ Other

Email Address:

☐ View Only Schedule

Dispatch Schedule page

Click the Preview Schedule button to view all schedules matching the selection criteria that are available to be dispatched.

Dispatch Parameters

Method

Select the method for the dispatch. Options are *Email* and *Other*, which includes telephone, fax, or other method. If you select *Email*, then you must enter the supplier's email address.

Email Address

Enter the email address of the supplier. If the field is blank, then the Dispatch Multiple Supply Schedules process cycles through all vendor locations associated with all purchase orders for each schedule, and it concatenates all the ordering locations' email addresses together.

You can override the concatenated email addresses and enter a specific email address for the notification.

Deleting Past Schedules

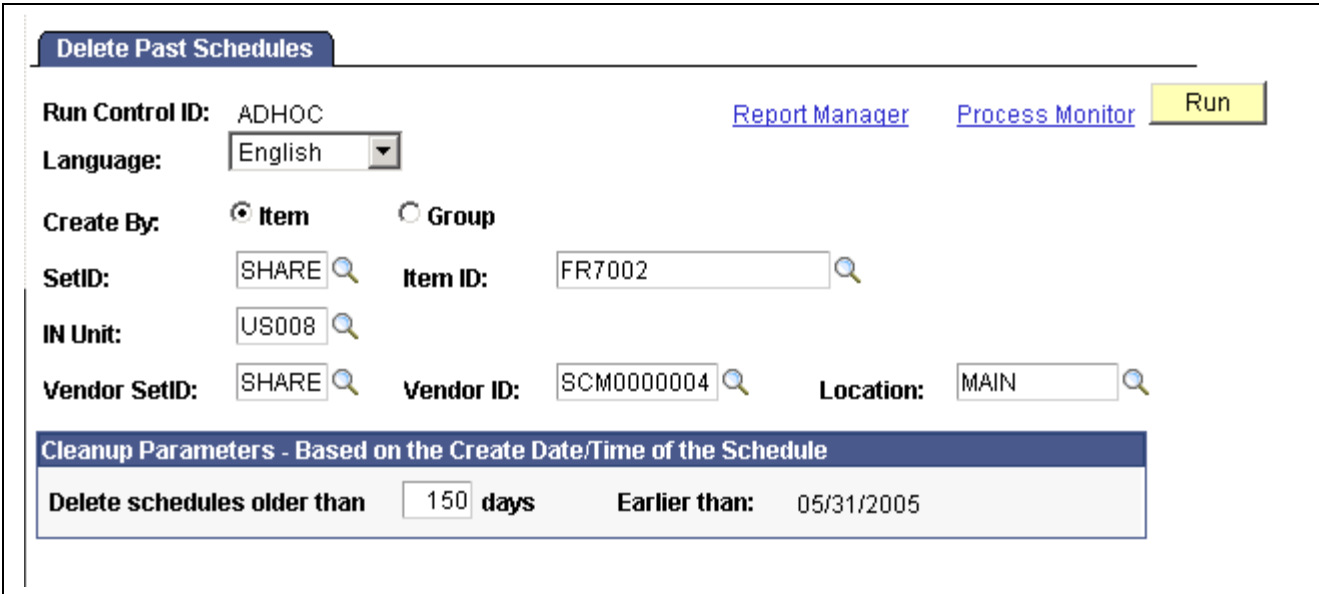
This section discusses how to run the Delete Past Schedules (PO_BLD CLEAN) process.

Page Used to Delete Past Schedules

Page Name	Object Name	Navigation	Usage
Delete Past Schedules	PO_COLLAB_CLEANUP	Purchasing, Supplier Schedules, Delete Schedules, Delete Past Schedules	Delete multiple past schedules based on aging relative to the current date.

Running the Delete Past Schedules Process

Access the Delete Past Schedules page.



Delete Past Schedules

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

Language: English

Create By: ☒ Item ☐ Group

SetID: SHARE Item ID: FR7002

IN Unit: US008

Vendor SetID: SHARE Vendor ID: SCM0000004 Location: MAIN

Cleanup Parameters - Based on the Create Date/Time of the Schedule

Delete schedules older than 150 days Earlier than: 05/31/2005

Delete Past Schedules page

Delete schedules older than ... days Enter a positive number. When you press TAB to exit the field, the Earlier than field reflects the change. For example, to delete schedules that are older than 20 days when the current date is 01/24/2006, enter 20. The Earlier than field then displays 01/04/2006. The system deletes all schedules that match the criteria and that were created on or before the date in the Earlier than field.

Enabling Suppliers to View Dispatched Schedules

When the schedule is dispatched by email, a link is included in the email which will take the supplier directly to the schedule requiring approval. A supplier can also view a pagelet with a list of the recently dispatched schedules. Depending on the system setup, the location of this pagelet varies. You can change the setup on the page or allow the supplier to determine the location.

In addition, with collaborative planning schedules, you can use workflow to send notification of scheduling tasks to the supplier. A supplier can access a pagelet in Collaborative Supply Management to view task details.

See Also

Appendix A, “Delivered Workflows for Collaborative Supply Management,” page 73

Enabling Suppliers to Update and Approve Schedules

This section provides an overview of supply schedule approval and discusses how to:

- Define approve schedules search parameters.
- Maintain a supplier's current schedules.
- View the item summary row types for new schedules.
- Edit and view pending approval quantities.
- Calculate capacity information.
- Calculate flex information.
- Confirm approvals.

Understanding Supply Schedule Approval

Suppliers can approve schedules that you dispatch, and they can review previously approved schedules. You must provide access for each supplier with whom you plan to collaborate. After entering certain selection criteria, a supplier can access a list of dispatched schedules associated with a Inventory business unit.

Note. The scheduler can only build and dispatch schedules. Only suppliers can approve schedules unless the schedule is a display-only schedule, and if so, the schedule is automatically approved when dispatched.

A supplier can:

- See the schedule in a similar format as the scheduler.
- View any capacity or flex information for the latest schedule.
- Change the approved quantities, due dates and/or times within the schedule.
- Approve a schedule which creates an email response to the scheduler.
- Enter comments.
- Send email.
- View recently dispatched schedules from the scheduler.

A supplier cannot:

- Modify any actual required quantities (actual planned or purchase order quantities).
- See actual required quantities for schedules pertaining to other suppliers.

Pages Used to Enable Suppliers to Update and Approve Schedules

Page Name	Object Name	Navigation	Usage
Approve Schedules - Select Vendor	WV_SS_VND_LIST	Manage Supply, Approve Schedules, Select Vendor	Select the vendor for whom the schedule is maintained. A supplier clicks a vendor name to access the Filter Options page and enter search criteria for the schedule item. If only one vendor ID is associated with the user ID, the Select Vendor page does not appear. Instead, the supplier accesses the Filter Options page directly.
Approve Schedules - Filter Options	PO_BUY_SEL	- Manage Supply, Approve Schedule, Selection Criteria - Click a vendor ID link on the Select Vendor page. If the user is associated to only one vendor, the user will go directly to Filter Options page.	Narrow the list of items for which the supplier maintains a schedule. Define selection criteria to determine the type of schedule (current or past) to review.
Approve Schedules - Schedule/Item List	PO_SS_COLLITM_LIST	Select Maintain Current Schedule on the Filter Options page then click Search.	View all the items that have been dispatched from the scheduler and those that were previously approved.
Approve Schedules - Summary	PO_BUY_ITEM_SUM	Click an Item ID or Group link on the Schedule List page	View, edit and approve a schedule.
Approve Schedules - Comments	PO_BUY_ITM_COMMENT	Click the Edit Comment link on the Summary page to maintain or add new comments. Click the Previous Comments link on the Item summary page to view comments from the previous schedule.	View or edit the comments. Both the scheduler and the scheduler can use this page.

Defining Approve Schedules Search Parameters

Access the Approve Schedules - Filter Options page.

Note. This component is used for suppliers only.

Approve Schedules

Filter Options

ERNIE'S BIKE SHOP

Enter search criteria and click on Search. Leave blank for all values.

Search Criteria

☒ **Maintain Current Schedules**
☐ **Show new schedules only**

☐ **View Past Schedules**
From:  **To:** 
***Period Duration:**

Filter

Inventory Business Unit:
Category: **Group:** 
Vendor Item ID:  **Vendor Location:** 
Item ID:  **Schedule Priority:**
UOM to View Quantities:
☐ **Show Schedules with Capacity Violations only** ☐ **Show Schedules with Flex Violations only**
☐ **Pre-Load Capacity/Flex data**

Search

Approve Schedules - Filter Options page (supplier)

Maintain Current Schedules	Select to display a list of schedules with the status <i>New</i> or <i>Approved</i> .
Show new schedules only	Select to view only new schedules awaiting approval. Approved schedules are excluded.
View Past Schedules	Select to display a list of schedules that have been previously approved. The supplier must select a date range to view the past schedules.
From	Enter the start date for the period of time for which the supplier views past schedules.
To	Enter the end date for the period of time for which the supplier views past schedules.

Maintaining a Supplier's Current Schedules

Access the Approve Schedules - Schedule/Item List page.

Approve Schedules						
Schedule/Item List						
ERNIE'S BIKE SHOP						
Set filter options						
Schedules Details [Filter] Customize Find View All First 1-3 of 3 Last						
Item ID	Group	Description	Dispatched Date/Time	Status	Vendor Location	Ship To
FR7003		Bike Frame, Carbon Fiber	06/09/2005 8:11:23PM	New	MAIN	COLORADO BIKE MFG/OUTDOOR
	BRAKES	Bike Brakes	06/12/2003 4:14:28PM	New	MAIN	
FR7002		Bike Frame, Aluminium	04/13/2001 9:16:02AM	New	MAIN	COLORADO BIKE MFG/OUTDOOR

Approve Schedules - Schedule/Item List page (supplier)

Suppliers use this page to view details relating to the schedules.

Viewing the Item Summary Row Types for New Schedules

Access the Approve Schedules - Item Summary page.

Approve Schedules																																																																							
Item Summary																																																																							
ERNIE'S BIKE SHOP																																																																							
Item ID:	FR7003	Bike Frame, Carbon Fiber																																																																					
Location:	MAIN	Ship To:	COLORADO BIKE MFG/OUTDOOR	Send E-mail Return to Schedule List Approve																																																																			
Status:	New Schedule																																																																						
Qty's Shown in:	Vendor Default UOM	EA																																																																					
Period Duration:	Week	Week starts on:	Thursday																																																																				
Review/Update your Pending Approval Quantity and then click the Approve button to send your response.																																																																							
Summary Week 1 - 7 Week 8 - 10 [Filter] <table> <thead> <tr> <th></th><th>06/09/2005</th><th>06/16/2005</th><th>06/23/2005</th><th>06/30/2005</th><th>07/07/2005</th><th>07/14/2005</th><th>07/21/2005</th></tr> </thead> <tbody> <tr> <td>Previous Required Qty</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td></tr> <tr> <td>Previous Approved Qty</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td></tr> <tr> <td>Additional Qty Since Approved</td><td>0.0000</td><td>100.0000</td><td>100.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td></tr> <tr> <td>Current Required Qty</td><td>0.0000</td><td>100.0000</td><td>100.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td></tr> <tr> <td>Pending Approval Qty</td><td>0.0000</td><td>100.0000</td><td>100.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td></tr> <tr> <td>Shortage/Overage</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td></tr> <tr> <td>Short/Over Rolling</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td><td>0.0000</td></tr> </tbody> </table> Quantities contain planned orders Comments Scheduler's Comment: Startup schedule carbon frames 4/22 Edit Comments Supplier's Comment:									06/09/2005	06/16/2005	06/23/2005	06/30/2005	07/07/2005	07/14/2005	07/21/2005	Previous Required Qty	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	Previous Approved Qty	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	Additional Qty Since Approved	0.0000	100.0000	100.0000	0.0000	0.0000	0.0000	0.0000	Current Required Qty	0.0000	100.0000	100.0000	0.0000	0.0000	0.0000	0.0000	Pending Approval Qty	0.0000	100.0000	100.0000	0.0000	0.0000	0.0000	0.0000	Shortage/Overage	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	Short/Over Rolling	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
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Disclaimer: Schedule forecast is not a commitment to buy.																																																																							

Approve Schedules - Item Summary page (supplier)

Note. Click a quantity link to navigate to the item details.

See [Chapter 3, “Using Collaborative Planning Schedules,” Scheduler’s Workbench Row Types, page 21.](#)

Editing and Viewing Pending Approval Quantities

Access the Approve Schedules - Summary page. Click a link for a pending approval quantity.

Note. The Pending Approved Qty collapsible group box appears only after you click one of the links.

Approve Schedules

Item Summary

ERNIE'S BIKE SHOP

Item ID: FR7003 Bike Frame, Carbon Fiber
Location: MAIN **Ship To:** COLORADO BIKE MFG/OUTDOOR
Status: New Schedule
Qty's Shown in: Vendor Default UOM EA
Period Duration: Week **Week starts on:** Thursday

[Send E-mail](#)
[Return to Schedule List](#)

Review/Update your Pending Approval Quantity and then click the Approve button to send your response.

Summary							
	06/09/2005	06/16/2005	06/23/2005	06/30/2005	07/07/2005	07/14/2005	07/21/2005
Previous Required Qty	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Previous Approved Qty	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Additional Qty Since Approved	0.0000	100.0000	100.0000	0.0000	0.0000	0.0000	0.0000
Current Required Qty	0.0000	100.0000	100.0000	0.0000	0.0000	0.0000	0.0000
Pending Approval Qty	0.0000	100.0000	100.0000	0.0000	0.0000	0.0000	0.0000
Shortage/Overage	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Short/Over Rolling	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000

[Quantities](#) contain planned orders

Comments

Scheduler's Comment: [Edit Comments](#)

Supplier's Comment:

Disclaimer: Schedule forecast is not a commitment to buy.

Supplier Item Detail Pending Approval Qty group box

Revised Vendor Quantity The schedule quantity to which the supplier can suggest updates. The default value is the current required quantity.

Note. The revised quantity UOM is based on the value selected in the UOM to View Quantities field on the Filter Option page. If you select *Standard UOM* in the UOM to View Quantities field, the system prompts you to enter the revised standard quantity. The system then calculate and displays the revised vendor quantity if you selected the Show Vendor Qty/UOM Columns option.

Calculating Capacity Information (Suppliers)

Click the Calculate Capacity/Flex button to calculate the capacity for this schedule.

If the capacity and flex information has already been calculated, this button changes to Recalculate Capacity/Flex. As changes are made to the item details, the capacity and flex information is *not* automatically updated. Clicking this button saves any pending detail changes and recalculates the capacity and flex information.

The grid displays all date ranges defined for the group or item in the capacity setup that overlap the start and end dates of the schedule being viewed.

	This red box denotes that there is a violation.
Actual Qty (actual quantity)	This column displays the pending approval quantity values for the specific range. This compares the defined capacity quantity against the actual data.
Date Exceeded	If there is a violation for this row type, you can click the Calculate Date button to generate the exact date when the quantity exceeded the defined capacity quantity. If the date falls within the schedule start and end range, then the date will be a link that enables you to navigate into the corresponding bucket (period).

Calculating Flex Information (Suppliers)

If flex has been defined for the group or item, you can click the Calculate Capacity/Flex button to calculate flex information for the schedule.

The Flex collapsible section shows both fixed and firmed periods. The first section shows the detailed information such as fixed or firmed periods, the date range for the period, whether tolerance is by day or range, and the upside or downside percentages are defined.

The quantity comparisons all behave similar to capacity as they are compared against the pending approval quantities.

Flex Details Tab

Select the Flex Details tab.

Date	If the period is defined as <i>by day</i> , then each day within the range will be displayed in the grid separately.
Note. Only the days where there are quantities defined are displayed; days with zero quantity are not displayed.	
Start Date or End Date	If the period is defined as <i>by range</i> , then there will be one row in the grid with the entire range together.

Baseline Qty (baseline quantity)	The quantity for the given day or range that was approved for the last schedule.
Actual Qty (actual quantity)	The pending approval quantity for the given day or range.
Over/Under Flex Qty (over or under flex quantity)	This column will display the difference between the actual quantities and the baseline quantity $\pm$ Flex upside or downside quantity (quantity over or under the flex). This value is highlighted if the Flex has been exceeded for fixed or firmed ranges. This value indicates how far over or under the acceptable flex quantity the buyer is for that specific date. This value is 0 if the buyer is within the flex tolerance quantity. This value is useful to indicate the quantity that needs to be adjusted to meet flex requirements.
Maximum Upside Qty (maximum upside quantity)	This quantity is the <i>total</i> acceptable upside quantity for the day or fixed or firmed range, based on setup options. This quantity is calculated based on the baseline value + the % upside $\times$ the baseline value. This value will be displayed independent of a violation and is useful to see the total maximum quantity that can be ordered.
Minimum Downside Qty (minimum downside quantity)	This quantity is the <i>total</i> acceptable downside quantity for the day or fixed or firmed range, based on setup options. This quantity is calculated based on the baseline value – the % downside $\times$ the baseline value. This value displays independent of a violation and is useful to see the total minimum quantity that should be ordered.

More Calculations Tab

Select the More Calculations tab.

Upside (Delta) Qty (upside delta quantity)	This column displays the <i>delta</i> acceptable upside quantity for the day or fixed or firmed range, based on setup options. This quantity is calculated based on the maximum quantities – actual quantities. This quantity is useful to determine if additional quantities can be ordered.
Downside (Delta) Qty (downside delta quantity)	This column displays the <i>delta</i> acceptable downside quantity for the day or fixed or firmed range, based on setup options. This quantity is calculated based on the actuals quantities – minimum quantity. This quantity is useful to determine if fewer quantities can be ordered.
Over/Under Baseline %	This column displays the current over or under percentage based on actuals versus baseline. For example, if the baseline quantity is 100, and actual quantity is 105, then the percentage is 5. This percentage is useful for the buyer to see how much flex is being utilized based on actuals. When the actual quantities are equal to the baseline quantities, this value is zero.

Confirming Approvals (Suppliers)

When the supplier clicks the Approve button on the Approve Schedules - Item Summary page, the system immediately generates an approval confirmation to indicate which item was approved and the start and end date of the schedule. In addition, if the scheduler entered an email address when the schedule was created, the system notifies the scheduler by email of the approval.

After a schedule is approved, the item status on the scheduler's workbench changes from *Dispatched* to *Supplier Approved*.

Viewing Past Schedules

This section discusses how to review previous approved quantities.

Pages Used View Past Schedules

Page Name	Object Name	Navigation	Usage
Approve Schedules - Select Vendor	WV_SS_VND_LIST	Manage Supply, Approve Schedules	Select the vendors whose Kanban requests you want to review.
Approve Schedules - Filter Options	PO_BUY_SEL	- Manage Supply, Approve Schedules, Filter Options - Click a vendor ID link on the Approve Schedules - Select Vendor page. If the user is associated to only one vendor, this link goes directly to the Filter Options page.	Narrow the list of schedules for which the supplier maintains a schedule.
Approve Schedules - Schedule/Item List	PO_SS_COLLITM_LIST	Select the View Past Schedules button, enter a date range, and click the Search button on the Filter Options page.	View all the schedules with a status of <i>Previous</i> or <i>History</i> .
Approve Schedules - Item Summary	PO_BUY_ITEM_SUM	Click an Item ID or Group link on the Approve Schedules - Schedule/Item List page.	View past schedules.

Reviewing Previous Approved Quantities

Access the Approve Schedules - Schedule/Item List page. Click the link for a previous approved quantity.

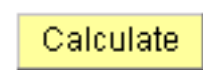
Note. The Previous Approved Qty group box appears only after you click one of the links.

Applying Collaborative Changes (Scheduler)

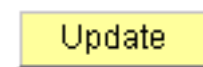
After the supplier approves a schedule, the scheduler can reconcile the supplier's feedback and apply changes to the collaborative schedule. When entering in Apply mode for an approved schedule, the system calculates a proposed apply quantity using a combination of supplier feedback regarding quantity changes and dates, along with any potential changes in the actual plan since the time the schedule was dispatched to the supplier. Both planned orders and purchase orders are included when you review changes and determine which ones to apply. Purchase orders are included only if selected for inclusion when the schedule was created (built). Planned order changes (including supply-side collaborative changes and scheduler changes) can be applied automatically. What-if scenarios can be simulated for purchase orders within the apply process. However, actual changes to purchase orders are done manually.

This section discusses how to review and modify the proposed apply quantity.

Common Elements Used in This Section



Click to calculate the new Proposed Apply quantity for the affected row types. The system does not update the data until you click the Update button.



Click to update the quantities on the Scheduler's Workbench - Summary page for the affected Required Actual Quantity (planned orders). Actual quantities are updated to match the Proposed Apply quantities.

Note. The Update button can be clicked only once within Apply mode for a schedule.

Apply

Click this link next to an schedule with the status *Supplier Approved* on the Scheduler's Workbench - List page. After you apply the changes, the link is no longer visible on the item list.

Total Quantity

Displays the running total based on the selected action, planning status, the actual (or live) data quantity or the collaborated quantity. If the action is *Collab*, the collaborated quantity is used. If the action is *Ignore* or the planning status is *Canceled*, no quantity is added to the total. The Total Quantity field is updated when you click the Calculate button after modifying any proposed quantities in the detail page.

Chg (change)

Rows marked as Chg (change) are used to identify which rows have changes since the initial schedule was dispatched to the supplier. Displays whether a change has taken place in the quantity or date and time by the supplier, scheduler, or planning since the schedule was dispatched.

Quantity

Represents the quantity used for the actual data. If the planning status is not *Canceled*, the quantity cannot be 0.

You can change this quantity for PO-related lines to reflect related impact on the schedule. However, purchase order changes are always made manually.

Collab Due Date (collaborated due date)

Displays the due date of the collaborative quantity.

Collab Time Due (collaborated time due)

Displays the time due of the collaborative quantity.

Collaborated Qty
(collaborated quantity)

Displays the agreed upon or proposed quantity changes from the supplier.

Pages Used to Apply Collaborative Changes

Page Name	Object Name	Navigation	Usage
Scheduler's Workbench - Selection Criteria	PO_BUY_SEL	Purchasing, Supplier Schedules, Scheduler's Workbench, Selection Criteria	View a list of items that have been approved by the supplier. These items must have the status <i>Supplier Approved</i> .
Scheduler's Workbench - List	PO_BUY_LIST	Click Search on the Scheduler's Workbench - Selection Criteria page.	Select a supplier approved schedule to apply changes.
Scheduler's Workbench - Summary	PO_BUY_ITEM_SUM	Click the Apply link for a schedule with the status <i>Supplier Approved</i> on the Scheduler's Workbench - List page.	Review and modify the proposed apply quantity. Determine which type of data to select based on the selected action.

Reviewing and Modifying the Proposed Apply Quantity

Access the Scheduler's Workbench - Summary page.

This page enables you to:

- Review the changes that the supplier suggested in line with any actual (or live) data for the schedule.
- Review impact on capacity and flex in relation to the proposed quantity as well as actual quantities.
- Modify the data and track the cumulative impact on the schedule (that is, perform what-if scenarios) without affecting the actual underlying planned orders.

This enables you to maintain actual orders and include the supplier changes for a given schedule.

To review and modify proposed apply quantity:

1. In the Summary group box, click the Proposed Apply Qty link to display the item details and supplier feedback.
2. Review the rows of actual and collaborative feedback from the supplier.

Change the actions, quantities, dates, and planning settings depending on the desired effect. Click the Add button to add a new row (new planned order).

Note. When you change the data on this page, the system does not modify the underlying planned orders until you click the Update button. If you make changes on this page and exit without clicking the Update button, the changes are lost.

Action

Select to indicate the action to take for the specific row during the update of actual planned orders. The action defaults are based on the assumptions made in the apply process. Generally, if collaborative changes have been made on the supply side only, the system uses *Collab*. If changes have been made to both the live data (on the scheduler side), the system uses the action *Actual* by default. Values are:

- *Collab*: The system replaces the actual planned data with the collaborated data (due date, time, and quantity).

When the supplier adds a new quantity, the new rows appear as *Collab*, and the system adds the new planned orders.

- *Actual*: Actual data represents an existing planned order in the system.

Actual data can be modified and applied. Rows marked with the *Actual* action retain the date, time, and quantity values for the planned order. However, if the data was changed in the Apply Details, the changed data is applied to the planned order.

You can also use the *Actual* action if you do not want to use the collaborated data. In this case, you would change the action from *Collab* to *Actual*, and enter the revised data in the *Due Date*, *Due Time*, and *Quantity* fields. The system uses this data instead of the collaborated data to update the planned order.

- *Ignore*: The system does not process the row.

For example, if the supplier suggests a new quantity (new planned order), you can select this value so that the planned order is not created.

- *Manual*: You use this action for collaboration on a real purchase order. You can use this action to perform what-if scenarios on the quantity, but the system does not update the purchase orders.

Planning Status, Frz
(frozen), and **Aprv**
(approved)

When you click the Update button, the planned orders are updated with these values. The values apply to rows with the action *Actual* or *Collab* selected. For example, the supplier might request a new planned quantity in the fixed period which appears to the buyer as a *Collab* row. If the buyer leaves the action as *Collab* and selects *Aprv*, when the Update button is clicked, the new approved planned quantity is added to the system which, once processed, will result in a new purchase order schedule line for the item.

Note. Depending on the settings for group or item, when you click the Update button, the planned orders for the appropriate number of days in the fixed or firmed period will be automatically set to Approved, Firmed, or Frozen. Approved orders are approved for new purchase orders. Frozen and Approved settings identify the planned orders so that subsequent Supply Planning runs will honor these settings (they won't be rescheduled).

See [Chapter 3, "Using Collaborative Planning Schedules," Defining Fixed or Firmed Attributes, page 31](#).

This table describes the rules that the system applies to determine the default actions that appear for the proposed apply quantity. *Actual* refers to the existing planned orders in the system, and *Collab* refers to the changes made by the supplier.

Actual Data	Collaborated Data	Default Action	Notes
No change in actual data.	No change in collaborated data.	<i>Actual</i>	No changes made by scheduler or supplier, so the system leaves the data intact.
No change in actual data.	Change in collaborated data.	<i>Collab</i>	The system applies the supplier changes to the schedule.
Change in actual data.	No change in collaborated data.	<i>Actual</i>	The actual planned orders changed because the schedule was dispatched. The system keeps the actual planned orders intact.
Change in actual data.	Change in collaborated data (excluding date changes).	<i>Actual</i>	The actual planned orders changed because the schedule was dispatched. The system keeps the actual planned orders intact and disregards the supplier's changes
Changes in actual data.	Change in collaborated data (date changes).	<i>Actual and Collab</i>	Two rows appear: one with the action <i>Actual</i> for the changes on the actual side and the other with the action <i>Collab</i> for the changes on the supply side. The system keeps track of both changes, because both changes may be important, and they may need to be reconciled.
Add a new planned purchase order.	Not applicable.	<i>Actual</i>	The new planned order was added because the schedule was dispatched. The system keeps the actual planned order.
Not applicable.	Add a new planned purchase order.	<i>Collab</i>	Supplier suggested a new quantity. The system applies supplier's changes to the schedule.

Performance Considerations

To improve performance when using the PeopleSoft Supply Planning system in conjunction with the Apply Collaborative Change feature, you can add a user index to the PL_PLAN_PO_ORD table on the Change Record Index page in PeopleTools. These are the values to use when creating the index:

Field	Value
Index	A
Type	User
Uniq	N
Clust	N
Custom Order	Y
Platfm	All
Key Fields	
BUSINESS_UNIT_IN	Asc
SEQ_NBR	Asc

See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Designer*

CHAPTER 4

Using Collaborative Supply Management Pagelets

This chapter provides an overview of Collaborative Supply Management supplier pagelets, and discusses how to:

- Organize pagelets by functional role.
- Personalize pagelets.
- View pagelets.

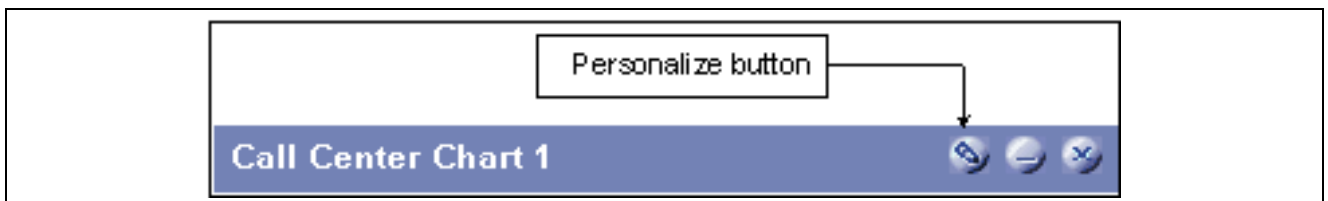
Understanding Collaborative Supply Management Pagelets

Collaborative Supply Management provides portal pagelets for the corporate intranet or internet home pages. These pagelets provide access to key data and transactions within Collaborative Supply Management for use in supplier portal registries.

You and the suppliers can personalize the portal home page by adding the pagelets that the suppliers need. Standard PeopleSoft role-based security ensures that users can access only the pagelets appropriate to their roles.

Suppliers can configure their portal home page with three narrow columns or one narrow and one wide column. Some pagelets have both a narrow and a wide version, each with its own object name. When you see two object names for a pagelet, the first one refers to the narrow version.

Some pagelets support personalization; the Personalize button in the pagelet title bar alerts the suppliers to this capability. Click the button to access the personalization page.



Personalize button

Pagelet Security

Similar to page access, you control pagelet security at the component level by associating it with a permission list (which is then associated with a role); each pagelet has its own component to enable more granular access. (You can ascertain a pagelet's component name in PeopleSoft Application Designer by searching for definition references to object name or system name for the page.)

We group our pagelets into functional roles as an example of how to organize access. You need to create the proper permission lists and associate them with actual role definitions before the users can access them, or use the permission list definitions that we provide in our delivered sample data. We deliver sample data security objects (roles and permission lists) that you can use as an example of how to set up pagelet access.

Pagelets by Role

We provide these supplier-oriented role groupings as examples of how to organize pagelet access by function.

In this section, we organize these pagelets by these sample roles:

- Supplier - Application Administrator
- Supplier - Production Manager

Note. Based on the corporate needs and willingness to share information externally, carefully consider which data (applications) as well as pagelets you want to make available to the suppliers.

Supplier - Applications Administrator Pagelets

The Supplier - Applications Administrator is an external-facing role that can access these Collaborative Supply Management pagelets:

- Recently Dispatched Schedules
- Remaining Quantity Balances

Supplier - Production Manager

The Supplier - Production Manager is an external-facing role that can access these Collaborative Supply Management pagelets:

- Recently Dispatched Schedules
- Remaining Quantity Balances

Personalizing Supplier-Facing Pagelets

This section discusses how to personalize user defaults.

Note. Suppliers can personalize some of the supplier-facing pagelets.

Pages Used to Personalize Supplier-Facing Pagelets

Page Name	Object Name	Navigation	Usage
<Pagelet Name> - Personalize User Defaults	WV_PE_USR_DEF	 Click the Customize button on these supplier-facing pagelets: Recently Dispatched Schedules Remaining Quantity Balances	Users associated with multiple vendor IDs can select a default vendor and where applicable, define the maximum number of retrieved records (rows) to display on the pagelet.
Personalize User Defaults - Save Confirmation	WV_PE_SAVE_CONFIRM	Click the Save button on the Personalize User Defaults page.	Confirm the changed user defaults.

Personalizing User Defaults

The suppliers can select default vendors, and in some cases, the number of rows to display on a pagelet.

Note. The system administrator can further control the content and appearance of the supplier-facing pagelets at the reporting entity or vendor-setID level.

Select a default vendor (this option is only available when the user is associated with multiple vendor IDs).

If the pagelet displays transaction IDs, select the maximum number of records (rows) to display on the pagelet.

Viewing Collaborative Supply Management Pagelets

This section provides information about Collaborative Supply Management pagelets.

Pagelets Used to View Collaborative Supply Management Information

This table provides details on Collaborative Supply Management pagelets.

Pagelet Name	Roles	Audience	Usage	Enabling Applications
Recently Dispatched Schedules (WV_PE_DISP_SCHDS)	Supplier - Applications Administrator, Supplier - Production Manager	Employee	Displays the most recently dispatched schedules.	Requires all of these PeopleSoft products: Collaborative Supply Management, Inventory, and Purchasing
Remaining Quantity Balances (WV_PE_QTY_BAL)	Supplier - Applications Administrator, Supplier - Production Manager	Employee	Displays the remaining quantities (and percentages) available, the quantity vendor-owned, and reorder point for consigned items.	Requires all of these PeopleSoft products: Collaborative Supply Management, Inventory, and Purchasing

Recently Dispatched Schedules Pagelet

Displays the most recently dispatched schedules.

Item ID	Group	Dispatched Date/Time	Status
	BRAKES	06/12/2003 4:14:28PM	New
FR7001		10/31/2001 9:53:33AM	Supplier Approved
FR7002		04/13/2001 9:16:02AM	New

[Show all/Enhanced...](#)

Recently Dispatched Schedules pagelet

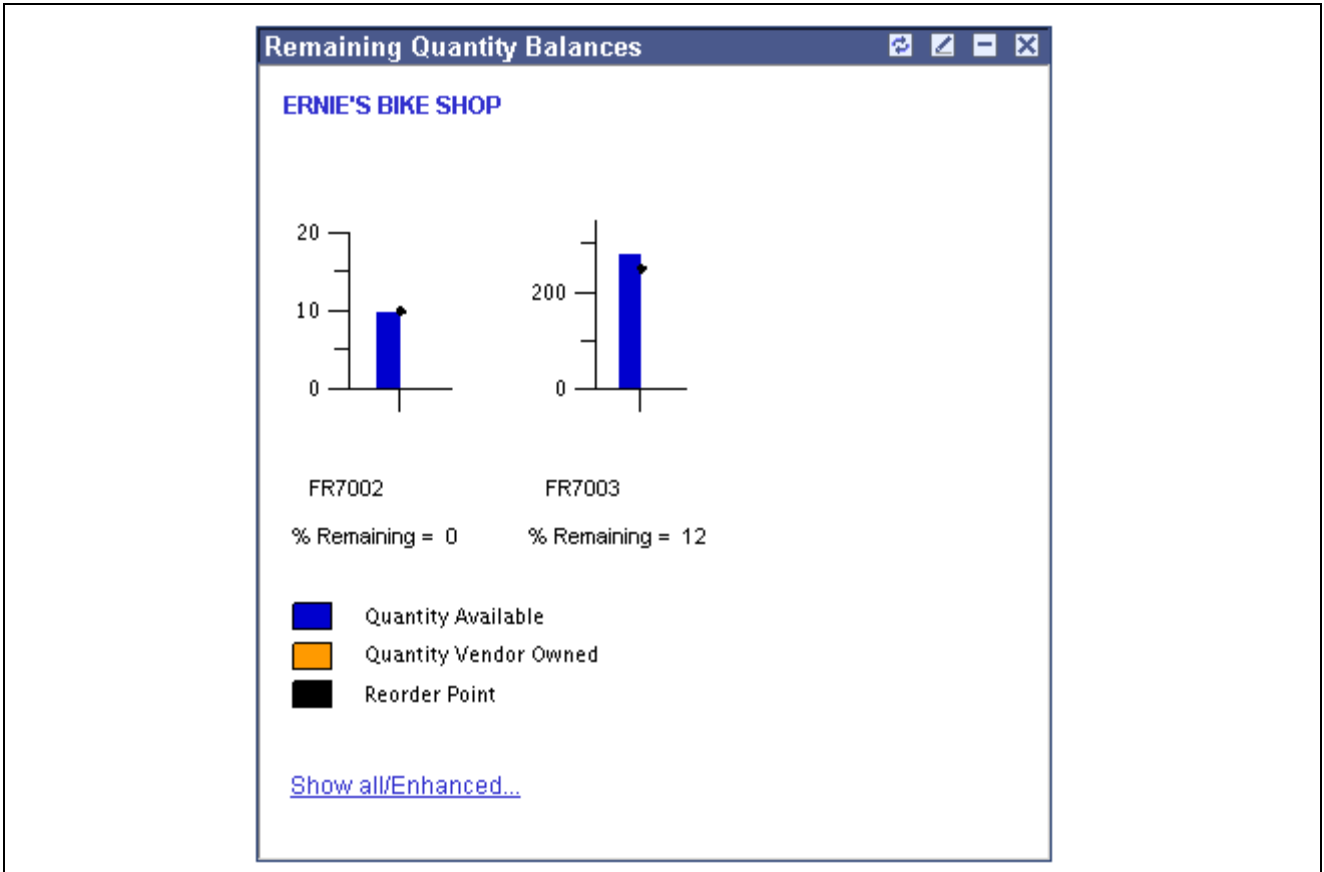
Show all/Enhanced

Click to navigate to the Approve Schedules Filter Options page, and enter the criteria to search for a schedule.

Note. Collaborative planning schedules use workflow to send scheduling task notification to the supplier. Using Collaborative Supply Management, the supplier receives task details by clicking a link for a Supplier Schedule work item; the system takes the supplier directly to the supplier workbench Schedule/Item List. The supplier can then click an item to access the Item Summary page. Once the supplier is satisfied with the schedule quantities, the supplier can approve the schedule.

Remaining Quantity Balances Pagelet

Access the Remaining Quantity Balances pagelet.



Remaining Quantity Balances pagelet

Displays the remaining quantities (and percentages) available, the quantity vendor-owned, and reorder point for consigned items. The system first displays the items that are closest to their reorder points.

Note. If the home page layout is 3-column, this pagelet displays up to four graphs. A 2-column layout restricts the number of graphs displayed to one or two.

% Remaining

Percentage remaining, derived by:

$$(\text{quantity available} - \text{reorder point}) / \text{restock value} \times 100$$

The restock value depends on the replenishment type used; *EOQ*, *Reorder Qty* (static reorder quantity), or *Min/Max*: the restock value equals (Max – reorder point).

Show all/enhanced

If the restock value is set to 0, then the percentage remaining is set to zero on the pagelet.

Click to view the inventory quantity balances transaction using Collaborative Supply Management's Quantity Details page.

APPENDIX A

Delivered Workflows for Collaborative Supply Management

This appendix discusses delivered workflows for Collaborative Supply Management.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Workflow Technology

Delivered Workflows for Collaborative Supply Management

This section discusses Collaborative Supply Management workflows. The workflows are listed alphabetically by workflow name.

PO Supplier Change

The section discusses the PO Supplier Change workflow.

Description

Event Description	Supplier side schedule approval.
Action Description	Notifies the buyer that the supplier has approved the supplier schedule but the schedule has suggested changes. Note. This worklist entry is in addition to the email notification to the buyer that the schedule has been approved.
Notification Method	Worklist

Workflow Objects

Event	PO_SUPPLIER_COLLAB
Workflow Action	PO_SUPPLIER_COLLAB
Role	Buyer

PO Supplier Schedule Dispatch

The section discusses the PO Supplier Schedule Dispatch workflow.

Description

Event Description	Dispatch a supplier schedule.
Action Description	Notifies the supplier that the schedule has been dispatched and is ready for supplier approval. Note. This worklist entry is in addition to the email notification to the supplier that a new schedule has been dispatched.
Notification Method	Worklist

Workflow Objects

Event	PO_SUPPLIER_COLLAB
Workflow Action	PO_SUPPLIER_COLLAB
Role	Supplier

Glossary of PeopleSoft Enterprise Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Enterprise Human Resources, PeopleSoft Enterprise Benefits

	Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities. In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing. In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks. In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft Enterprise General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i>.
business unit constraints	In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
buy event	In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction. For bidders, the sale of goods or services.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
cash drawer	A repository for monies and payments taken locally.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner	In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
claimback	In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .

collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
constraint	A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

	3C access groups so that you can assign data-entry or view-only privileges across functions.
	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also <i>class</i> .
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
direct receipt	Items shipped from a warehouse or vendor to another warehouse.
direct ship	Items shipped from the vendor or warehouse directly to the customer (formerly referred to as <i>drop ship</i>).
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.
division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i>.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set	In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.
event constraints	In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.
event propagation process	In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
financial sanctions	For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment. For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund	In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GDS	Abbreviation for <i>Global Distribution System</i> . Broad-based term to describe all computer reservation systems for making travel plans.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
global constraints	In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.
group	In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.
ideal response	In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.

incentive rule	In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.
itinerary	In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as <i>pending reservations</i> . Reservations that have been paid for are referred to as <i>confirmed reservations</i> .
joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
KVI	Abbreviation for <i>Known Value Item</i> . Term used for products or groups of products where the selling price cannot be reduced or increased.
landlord	In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
lease	In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.
lease abstract	In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
line	In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load	In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
NDP	Abbreviation for <i>Non-Discountable Products</i> . Term used for products or groups of products where the selling price cannot be decreased.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
Optimization Engine	A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
phase	A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.
pickup quantity	The product quantity that the customer is taking with them from the counter sales environment.
plan	In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and

	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	Enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	The conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
product adds	The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as <i>giveaways</i>).
product bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
product line	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
proxy bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.

REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reservations	In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
RFI event	In PeopleSoft Strategic Sourcing, a request for information.
RFx event	In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
saved bid	In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.
score	In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
sell event	In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.
serial genealogy	In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements. In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
short-term customer	A customer not in the system who is entered during sales order entry using a template.

single signon	With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.
source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
sourcing objective	For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).
speed key	See <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch). When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
task	A deliverable item on the detailed sourcing plan.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
tenant	In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.
territory	In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
third party	A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.
tiered pricing	Enables different portions of a schedule to be priced differently from one another.
time span	A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.
total cost	In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

travel group	In PeopleSoft Expenses, the organization's travel rules and policies that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.
travel partner	In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
trace usage	In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access*.

user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

yield by operation

In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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