PEOPLESOFT ENTERPRISE

PeopleSoft Enterprise Flow Production 9.0 PeopleBook

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PeopleSoft Enterprise Flow Production 9.0 PeopleBook
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Contents

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.
Italics	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 *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
" " (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 Flow Production Preface

This preface discusses:

- Oracle's PeopleSoft Enterprise products.
- 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.

Oracle's PeopleSoft Enterprise Products

This PeopleBook refers to these products:

- PeopleSoft Manufacturing
- PeopleSoft Inventory
- PeopleSoft Purchasing

PeopleSoft Application Fundamentals

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

These companion PeopleBooks contain information that applies specifically to PeopleSoft Flow Production:

- *PeopleSoft Enterprise Application Fundamentals PeopleBook*
- *PeopleSoft Enterprise Setting Up Procurement Options PeopleBook*
- *PeopleSoft Enterprise Managing Items PeopleBook*

Pages With Deferred Processing

Several pages in PeopleSoft Flow Production 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: Application Designer

Common Elements Used in This PeopleBook

As of Date
The last date for which a report or process includes data.

Description
Freeflow text up to 30 characters.

Effective Date
Date on which a table row becomes effective; the date that an action begins. For example, if you want 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 and batch processes that use the information use the current row.

EmplID (employee ID)
Unique identification code for an individual associated with your organization.

Language or Language Code
The language in which you want the field labels and report headings of the reports to print. The field values appear as you enter them.

Language also refers to the language spoken by an employee, applicant, or non-employee.

Process Frequency (group box)
Designates the appropriate frequency in the Process Frequency group box:

- Once executes the request the next time the batch process runs.

  After the batch process runs, the process frequency is automatically set to Don’t Run.

- Always executes the request every time the batch process runs.
- Don’t Run ignores the request when the batch process runs.

Report ID
The report identifier.

Report Manager
This button takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor
This button takes you to the Process List page, where you can view the status of submitted process requests.

Run
This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

Run Control ID	A request identification that represents a set of selection criteria for a report or process.
User ID	The system identifier for the individual who generates a transaction.
SetID	An identification code that represents a set of control table information or TableSets. A TableSet is a group of tables (records) necessary to define the company's structure and processing options.
Short Description	Freeflow text up to 15 characters.
Standard Unit of Measure (UOM)	A type of unit used for quantifying in PeopleSoft systems, and usually associated with items. Depending on the application, units of measure might describe dimensions, weights, volumes, or amounts of locations, containers, or business activities. Examples include inches, pounds, work hours, and standard cost dollars.
Unit (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.

CHAPTER 1

Getting Started with PeopleSoft Flow Production

This chapter discusses the integrations and implementation steps required to set up PeopleSoft Flow Production.

PeopleSoft Flow Production Integrations

PeopleSoft Flow Production integrates with these PeopleSoft products:

- PeopleSoft Manufacturing
- PeopleSoft Inventory
- PeopleSoft Purchasing

PeopleSoft Manufacturing

PeopleSoft Flow Production integrates with PeopleSoft Manufacturing to replenish material from a feeder line. PeopleSoft Flow Production can send Kanban cards and replenishment requests directly to a feeder line. Completion of these requests will send the material directly to the specified WIP location.

PeopleSoft Inventory

PeopleSoft Flow Production integrates with PeopleSoft Inventory to replenish production material from an inventory location. PeopleSoft Flow Production sends Kanban cards and replenishment requests to PeopleSoft Inventory. PeopleSoft Inventory will fulfill the material request and send the material directly to the specified WIP location.

PeopleSoft Purchasing

PeopleSoft Flow Production integrates with PeopleSoft Purchasing to replenish production material directly from a supplier. PeopleSoft Flow Production dispatches Kanban cards and replenishment requests to the supplier. Receiving processes are used to receive and move the material to the specified WIP location.

PeopleSoft Flow Production Enterprise Integration Points

This section discusses the EIPs used by PeopleSoft Flow Production to send and receive information.

EIP Name	Description
Replenishment Request (PRODUCTION_ REPLENISHMENT_REQ)	Use this inbound and outbound EIP to create a replenishment request or to import Kanban cards. See Chapter 4, “Maintaining Kanban Cards and Replenishment Requests,” page 15.

EIP Name	Description
Replenishment Request Dispatch (REPLENISH_ REQUEST_DISPATCH)	Use this outbound asynchronous message to inform a vendor to replenish a specific item See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Issuing Material to Production,” Issuing Material Using Electronic Data Collection.
Purchase Order Receipt (PURCHASE_ORDER_ RECEIPT)	Use this inbound asynchronous message for Kanban receiving. See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Maintaining Production Orders and Production Schedules”.

PeopleSoft Flow Production Implementation

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

Other Sources of Information

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

See Also

PeopleSoft Enterprise Application Fundamentals PeopleBook

Enterprise PeopleTools 8.48 PeopleBook: Setup Manager

CHAPTER 2

Understanding the Flow Production Process

This chapter provides an overview of flow production process and discusses:

- The Flow production process.
- Flow production.
- Flow production in Flow Production.

The Flow Production Process

In a traditional discrete environment, you use the master production schedule and material requirements plan (MRP) to explode the requirements and create planned orders for standard lot sizes that are then pushed into production and purchasing. The traditional MRP approach is often characterized by groups of items being processed and tracked using work orders that move in large lots from one operation to the next.

Flow manufacturing is a Just in Time (JIT) based pull system that manufactures to customer order. Production lines and processes are designed to produce a constantly changing mix of products at a steady rate. It utilizes schedules for mixed model production instead of work orders to drive production. The schedules for the mixed models are sequenced based on customer orders, and material is replenished using Kanbans, or replenishment signals. The role of MRP in flow manufacturing is primarily only for long-term planning of material and capacity requirements.

The Flow production process is designed to streamline production processes and efficiently move material to the shop floor. Flow manufacturing focuses on:

- Eliminating waste.
- Continuous improvement.
- Just-in-time material replenishment.
- Pull manufacturing.

A successful implementation of Flow manufacturing can lead to dramatically lower lead times by eliminating wait and move times, and improved quality since lot sizes are small and defects become more apparent when one operation quickly follows another.

Flow Production

Flow is a method of production and inventory control that is repetitive through the horizontal dimension of time and synchronized in the vertical dimension of production sequence. It is characterized by the same basic products, which are built consistently and in sufficient volume so that production lines may be dedicated to products or at least families of products, and by an effective program of matching production rates for all components. Executing Flow assumes pull, or that you drive replenishment that is based on sales of finished goods and usage of components.

Flow assumes that there are consistent patterns of product-based scheduling that can be employed, and that this smooth method of production can be transmitted to suppliers as well as in-house operations.

The use of Flow techniques and principles shorten the production, purchasing, and supply chain paths in a way such that throughput, and therefore return, is increased for the same asset base. This happens because inventory flows faster when there is less of it, and when lead times are composed largely of value-adding activities.

Flow is a set of principles that emphasize these attributes:

- Lean production.
- Visible production control.
- Demand driven and demand smoothing.
- Pull versus push.

Beginning with the Toyota Production System, many offshoot modes of operation have emerged, such as Just-in-time, Kaizen (continuous improvement), Kanban (pull), continuous replenishment, and many others. To a large degree, they are all the same thing.

Flow has evolved from these movements, but the scope of Flow is primarily production and inventory control. With Flow, there is a bias toward keeping demand consistently level, with incremental and smooth adjustments. There is a preference toward visible production control, versus complex scheduling logic. The ideal involves simple, visible production control methods that mirror the shop floor and supplier environments that they manage. A limit must be placed on the amount of inventory that can be in process, in inventory, or in a buffer. All supply chain, production and procurement operations must be clearly defined and composed of standardized, repeatable procedures.

Additionally, Flow brings its own heritage of methods and terms. Probably the most important of these is TAKT time. TAKT is a German word that literally means the beat that an orchestra plays to, as given by the conductor. The primary goal in Flow is to achieve consistently spaced production signals for all items based on their leveled demand.

In a batch or discrete manufacturing environment, work is pushed throughout the plant. A work order is created to signal production of a product with a defined quantity. The pick list and schedule is then generated and associated with the work order to communicate delivery of the raw materials that are required to create the product. Raw material is stored in a centralized location typically a distance away from the point of use. The schedule is created to deliver raw material in the most efficient manner and defines what components should be picked, the routes they follow, and the estimated time that they are expected to arrive and depart each work center throughout the production process. In an effort to optimize material handling, components may be picked together and moved to their appropriate work centers prior to the operator's need.

The raw material then waits in queue until the operator needs the material. Once the components are needed, the operator accesses the order in the system and the material is consumed. A transaction is processed for moving and completing the work. The work order then moves throughout the remaining steps, experiencing queues between move and completion transactions. When the product is finally completed, it is moved into finished goods inventory, where it waits to be delivered to the customer. Implicit in this approach are management complexities that are derived from scheduling material handling and inefficiencies that are experienced in non-value-added move and wait steps.

In a flow environment, work is triggered by demand, not pushed using schedules. In a pure flow environment there may be no work orders, pick lists, or transactions for moving material inside the production process. This is accomplished by putting more emphasis on visual management. Raw material that the operators use is stored near its point of use. Material is pulled from convenient locations when it is needed. Kanbans are used instead of schedules to signal work and control WIP (work in progress). Dedicated product lines are balanced with respect to production demand, so each operation performs within the TAKT time. Facilities are redesigned to accomplish a flowing product view of the plant rather than a discrete process view.

Flow Production in PeopleSoft Flow Production

Flow Production focuses on streamlined shop floor execution. You define replenishment attributes to provide a powerful automated tool for signaling replenishment and moving material within the supply chain. The goal is to most effectively communicate production and material replenishment signals by a variety of methods, most notably by creating and scanning Kanban cards and labels; routing replenishment requests using Workflow, Pull Lists, and Pull Tickets; or triggering replenishment through completions.

Using Flow Production, you can:

- Create Kanban cards and replenishment requests by manual data entry, scanning, or backflushing.
- Import Kanban cards and replenishment requests using the Kanban ID Import EIP.
- Replenish WIP locations from inventory locations, feeder lines, or directly from a vendor.
- Track, modify, or report status for individual Kanban IDs using the Kanban ID Review.
- Print Kanban cards and labels, Pull Tickets and labels, Pull Lists, and a Replenishment Dispatch report.
- Communicate replenishment requests using Workflow, Pull Lists, or Pull Tickets.
- Associate purchase orders to vendor-sourced replenishment requests and Kanban cards.
- Dispatch replenishment requests to a vendor using various dispatch methods, including email, fax, and the Replenishment Dispatch EIP.
- Display dispatched replenishment requests to vendors on the internet, if you have eSupplier Collaboration.
- Receive material from a vendor using Kanban Receiving.
- Record feeder line completions using Kanban Completions.
- Process transfers from inventory locations using Kanban Transfers.
- Review Kanban card and replenishment request transactions in the Inventory Transaction History tables.
- Use data collection throughout the flow execution process to scan in Kanban cards and Pull Tickets and process Kanban Receipts, Kanban Completions, and Kanban Transfers.

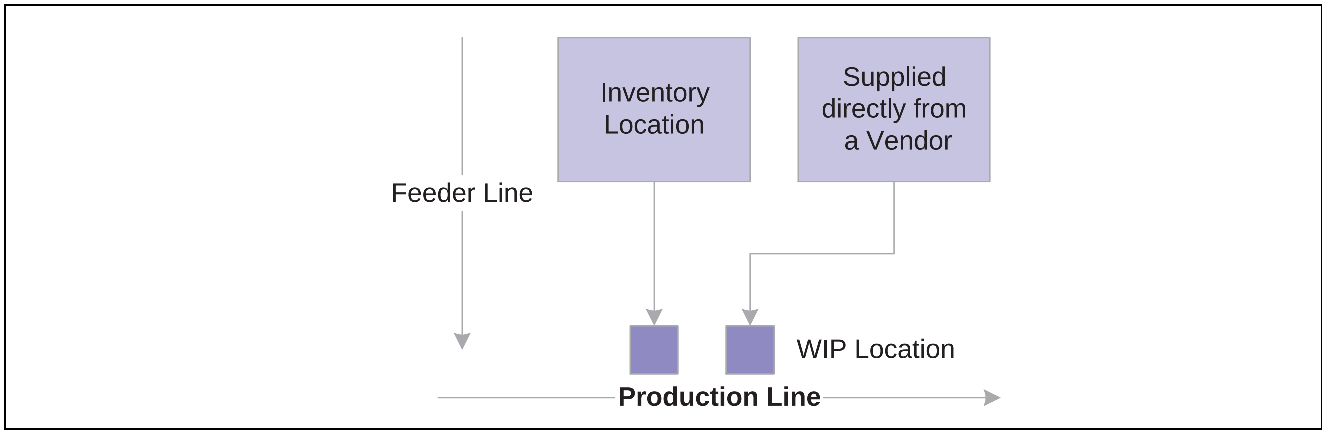
This section discusses:

- Replenishment sources.

- The Kanban card process.
- The replenishment request process.

Replenishment Sources

This diagram illustrates the three different ways that you can replenish a WIP location: inventory location, feeder line, and vendor.



Replenishment Sources

Inventory Location	A transfer from another Inventory location within the same business unit.
Feeder Line	Subassemblies that feed into main production lines.
Vendor	Vendor that supplies directly to the WIP location.

Each replenishment source works differently with the two replenishment generation processes, Kanban cards and replenishment requests (electronic Kanbans).

Note. To replenish a WIP location from a vendor, you must have Purchasing installed.

The Kanban Card Process

Kanban cards are used to indicate that a WIP location needs to be replenished for a specific item. You can use Kanban cards to replenish WIP locations from inventory locations, feeder lines, or vendors. You can create Kanban cards using the Kanban ID Maintenance page or import them from a third-party system. The system assigns Kanban cards the New status initially; you can't transact against Kanbans in this status. You can create Kanban cards to either be used multiple times (reusable) or one time only.

You can then print the Kanban cards using the Kanban Card Print function. Once you print the Kanban cards, their status changes to Open, which enables you to transact against them using the Kanban ID. You can't make any changes to the card details after they are printed; you can only change the status.

Once you print the Kanban cards, you can attach them to a box or container of components and move them to the lineside WIP location. This is done to initially seed the line. When you have used all of a particular item that is associated with the Kanban card, you place the Kanban card in a cardholder, and the cards are collected periodically for replenishment. You replenish the material based on the replenishment source of inventory location, feeder line, or vendor that is printed on the card.

Inventory Location

If this item is replenished from an inventory location, the Kanban card is taken to the inventory location that is specified on the card, attached to a box of components and taken back to the WIP location. You then scan in the Kanban ID, and the system records an inventory transfer using the Kanban Transfer page.

Feeder Line

If the replenishment source is a feeder line, the Kanban card is taken to the production area specified on the card. The Kanban card is then a request to start production of the subassembly and will be attached to the subassembly on the feeder line. You record this transaction using the Kanban Completions page.

Vendor

In the vendor scenario, you send the Kanban cards to the vendor, who ships material back based on the number of cards received. You then receive the shipment using the Kanban Receiving process.

You can view each Kanban card transaction, whether it is a transfer, completion, or receipt, in the Inventory Transaction History inquiry. The system logs the date and time of each transaction, which enables you to calculate the Kanban card cycle time and track cards on a daily basis to make sure cards aren't lost. For each card, you can view the Kanban quantity and source location details.

See Also

Chapter 3, "Setting Up PeopleSoft Flow Production," page 9

Chapter 4, "Maintaining Kanban Cards and Replenishment Requests," page 15

Chapter 5, "Using Replenishment Sources," page 31

The Replenishment Request Process

The main difference between Kanban cards and Kanban replenishment requests is that you create and print Kanban cards ahead of time, then they move between the WIP location and the replenishment source. In contrast, you create replenishment requests at the time when the inventory needs to be replenished. You can create replenishment using the Create Replenishment Requests page or import replenishment requests into the system using the Kanban ID Import EIP.

See Chapter 4, "Maintaining Kanban Cards and Replenishment Requests," Understanding Kanban Cards and Production Replenishment Requests, page 15.

You can generate replenishment requests in two ways, defined by the replenishment mode:

Backflush Controlled When you record a production completion, the backflush process consumes components at the WIP locations that are defined to each operation sequence. If the component issue method is Replenish for a component, the system then compares the on-hand inventory level of the component at the WIP location to the replenishment point and, if it is below, creates a replenishment request in the issue multiple quantity.

Manual If you are using the manual mode, there is some signal or visual indicator to let you know that the inventory level is low for an item at a WIP location. You use the Create Electronic Kanbans or Scan Electronic Kanban functions to generate a request.

For replenishment requests, the system sets the initial status to Open, which means that you can transact against the requests immediately.

Replenishment requests can be communicated in several ways: Pull List, Pull Ticket or workflow. The field that defines how replenishment requests are communicated is the replenishment method.

Pull List	As replenishment requests are created, they accumulate, and then a pull list report is generated, listing the replenishment requests that need to be fulfilled.
Pull Ticket	Similar to a one-time Kanban card. The pull ticket contains one replenishment request that needs to be fulfilled. Pull tickets can be printed by the inventory location or production area that sources the material.
Workflow	As replenishment requests are created, a worklist entry is created. When you work the worklist entry, the system takes you to the Kanban Transfers page.

Inventory Location

You can print the replenishment request details on the Pull List, Pull Ticket, or communicate them using Workflow. If you are using a Pull List or Pull Ticket, you scan the Kanban ID and the system records a Inventory transfer using the Kanban Transfer page. If the replenishment method is Workflow, once you generate the request, the system creates a worklist entry. When you work the worklist entry, the system displays the Kanban Transfer page, with the transfer information.

Feeder Line

If the replenishment source is a feeder line, the system generates a replenishment request manually or through backflush, and you print a Pull Ticket with the relevant item, quantity, and production area details. You can't use a Pull List or Workflow for Kanban completions.

Similar to the Kanban card completions processing, you attach the Pull Ticket to the subassembly on the feeder line. At the end of the feeder line, you scan the Kanban ID using the Kanban Completions page.

Vendor

If you use a vendor as the replenishment source, you use the Kanban Dispatch process to send replenishment requests to the vendor, who ships the material. If you have eSupplier Collaboration, once the replenishment is dispatched, the vendors can view the request on the internet. You then receive the shipment using the Kanban Receiving process.

See Also

Chapter 5, "Using Replenishment Sources," page 31

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Inquiring and Reporting About On-Hand Stock," Viewing Transaction History

CHAPTER 3

Setting Up PeopleSoft Flow Production

This chapter provides and overview of the steps required to set up flow production, after Inventory and Manufacturing information has been set up, and discusses how to:

- Set up Flow Production replenishment defaults.
- Set up issue methods.
- Set up Kanban automatic numbering.
- Set up purchasing defaults.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Preparing to Implement PeopleSoft Inventory"

Setting Up PeopleSoft Flow Production Replenishment Defaults

When creating replenishment requests or Kanban cards, the system looks to see if production replenishment location defaults exist first, then looks to the WIP replenishment defaults that are associated with the business unit and item for replenishment guidelines.

This section discusses how to:

- Set up production replenishment locations.
- Set up production replenishment details.
- Set up WIP replenishment item attributes.

Pages Used to Set Up PeopleSoft Flow Production Replenishment Defaults

Page Name	Object Name	Navigation	Usage
Prdn Replenish Locations	SF_REPL_INV	Inventory, Maintain Storage Locations, Production Replenish Locations, Prdn Replenish Locations	Set up production replenishment location defaults in Inventory.
Prdn Replenish Detail	SF_REPL_INV_DTL	Inventory, Maintain Storage Locations, Production Replenish Locations, Prdn Replenish Detail	Set up production replenishment location defaults in Inventory.
Manufacturing - WIP Replenishment	MFG_ATTRIB2	Items, Define Items and Attributes, Define Business Unit Item, Manufacturing	Set up item replenishment defaults in the Inventory Define Business Unit Items menu.

Setting Up Production Replenishment Locations

When creating replenishment requests or Kanban cards, the system looks at the production replenishment locations details first to see if specific item and WIP location replenishment details exist. If you haven’t set up Production Replenishment locations defaults, the system looks at the WIP Replenishment details by item.

See Also

PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, “Issuing Material to Production,” Using the Replenishment Method

Setting Up Production Replenishment Detail

Use the Prdn Replenish Detail page to set up production replenishment location defaults in Inventory.

See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Issuing Material to Production,” Using the Replenishment Method.

Setting Up WIP Replenishment Item Attributes

You use this page to define how the replenishment is triggered using the WIP Replenishment mode. You specify how the replenishment request is communicated with the WIP Replenishment Method, whether Pull List, Pull Ticket, or Workflow. You define here where the material comes from, inventory, feeder line, or vendor using the WIP Replenishment Source.

See Also

PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, “Issuing Material to Production,” Using the Replenishment Method

Setting Up Issue Methods

To use, each item must be defined with *replenishment* as the issue method.

This section discusses how to:

- Set up item issue methods.
- Set up production area issue methods.

Pages Used to Set Up Issue Methods

Page Name	Object Name	Navigation	Usage
Define Business Unit Item - Manufacturing: General	MFG_ATTRIB	Items, Define Items and Attributes, Define Business Unit Item, Manufacturing, General	Set up item replenishment defaults under Inventory Define Business Unit Items.
Production Area Maintenance - Item Detail	SF_PRDN_AREA_ITEM	Production Control, Define Production, Production IDs/Schedules, Production Area, Item Detail	Define production details for each item associated with a production area.

Setting Up Item Issue Methods

You must set the Component Issue method to Replenish for items that you replenish using Flow Production.

See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, “Defining Items by Business Unit,” Defining Manufacturing Information for an Item.

Setting Up Production Area Issue Methods

You can set the component issue method to Use Component’s Method on the Production Area - Item Detail page. You can also set the production area’s component issue method to Replenish to indicate that all components for the item use the replenish issue method.

See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Setting Up Production Areas,” Defining Production Area and Item Detail.

Setting Up Kanban Automatic Numbering

You must set up automatic numbering for Kanban IDs to enable the autonumbering of Kanban IDs when you create Kanban cards or replenishment requests.

Page Used to Set Up Kanban Automatic Numbering

Page Name	Object Name	Navigation	Usage
Auto Numbering	AUTO_NUM_PNL	Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering	Set up automatic numbering for Kanban IDs.

Setting Up Kanban Auto Numbering

You must set up defaults for the number type of Kanban ID. Associate the *SF_KANBAN_ID* Field Name to the automatic numbering defaults.

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, “Defining Financials and Supply Chain Management Common Definitions”

Setting Up Purchasing Defaults

If you are using vendor replenishment with Flow Production, you must set up several defaults in Purchasing.

This section discusses how to:

- Set up purchasing items.
- Set up vendors.
- Set up vendor contact information.
- Set up vendor email addresses.
- Set up vendor fax numbers.

Pages Used to Set Up Purchasing Defaults

Page Name	Object Name	Navigation	Usage
Purchasing Attributes - Purchasing Controls	ITM_TBL_PUR	Items, Define Items and Attributes, Purchasing Attributes, Purchasing Controls	Define whether to include past-due Kanban purchase orders when associating Kanban receipts with a specific purchase order.
Procurement Options	VNDR_PROC_OPT_SEC1	Vendors, Vendor Setup/Maintenance, Vendor Information, Location, Procurement Options	Set up the replenishment dispatch method.
Vendor Information - Location	VNDR_LOC	Vendors, Vendor Setup/Maintenance, Vendor Information, Location	Associate an address code for the vendor location in the Ordering group box. If you are dispatching vendor replenishment requests by email or fax, the system uses this address code to determine the vendor email address or fax phone number.
Vendor Information - Address	VNDR_ADDRESS	Vendors, Vendor Setup/Maintenance, Vendor Information, Address	Enter an email address for the address code.
Phone Information	VNDR_ADDR_PHN_SEC	Vendors, Vendor Setup/Maintenance, Vendor Information, Address, Telephone	Enter a vendor fax number for the address code.

Setting Up Purchasing Items

When associating Kanban receipts to a purchase order, select the Include Past Due Kanban POs check box if you want to include past-due purchase orders during the Kanban Receiving PO Selection process.

Also, because vendor replenishment occurs on a frequent basis, if you set the Early Ship Reject Days value too low, the receiving process may not permit you to receive the material because it arrived too early.

See Also

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

Setting Up Vendors

Use the Procurement Options page, accessed from the Location page, to define the replenishment dispatch method. When you create Kanban IDs and select a vendor for vendor replenishment, the vendor replenishment dispatch method is associated to the Kanban ID. When you run the Replenishment Dispatch process, the system determines the dispatch method using the value that is stored with the Kanban ID record. Dispatching is required for replenishment requests with backflush-controlled or manual replenishment modes. You don’t dispatch Kanban cards using the dispatch process.

See Also

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

Setting Up Vendor Contact Information

See *PeopleSoft Enterprise Source to Settle Common Information 9.0 PeopleBook*, “Maintaining Vendor Information,” Entering Vendor Contact Information.

Setting Up Vendor Email Addresses

See *PeopleSoft Enterprise Source to Settle Common Information 9.0 PeopleBook*, “Maintaining Vendor Information,” Entering Vendor Addresses.

Setting Up Vendor Fax Numbers

See *PeopleSoft Enterprise Source to Settle Common Information 9.0 PeopleBook*, “Maintaining Vendor Information,” Entering Vendor Addresses.

CHAPTER 4

Maintaining Kanban Cards and Replenishment Requests

This chapter provides an overview of the Kanban cards and production replenishment requests and discuss how to:

- Create Kanban IDs.
- Create manual replenishment requests.
- Create Kanban replenishment requests using electronic data collection.
- Review Kanban IDs.

Understanding Kanban Cards and Production Replenishment Requests

At the heart of Flow Production involves moving material to a WIP location when it is needed. You can replenish the WIP location from a Inventory location or feeder line or directly from the vendor. Flow Production provides multiple ways to move the material. You can use Kanban cards or replenishment requests with Workflow, you can use pull tickets, or you can use pull lists. You can also use electronic data collection to create replenishment requests.

This section discusses:

- Kanban card process.
- Replenishment requests (electronic Kanbans).
- Kanban ID import integration.
- Kanban card and replenishment request printing.

Kanban Card Process

A Kanban card is a physical card that is used to indicate that a WIP location needs to be replenished for a specific item. You can create Kanban cards using the Kanban ID Maintenance page or import them using the Kanban ID Import EIP.

You can print Kanban cards using the Kanban Card Print function. Once you print the cards, their status changes to Open which enables you to perform transactions with the cards using the Kanban ID. You can't make changes to the card details after the cards are printed; you can change the status only.

Once you have printed the Kanban cards, they can be attached to a box or other container of components and moved to the lineside WIP location. This is done to initially supply the line.

If an item is replenished from a Inventory location, then the Kanban card is taken to the location that is specified on the card, attached to a box of components, and returned to the WIP location. You then scan in the Kanban ID, and the system records the Inventory transfer. Multiple cards cycle between the WIP location and the replenishment source. You add or remove cards based on component usage.

If a replenishment source is a feeder line, the Kanban card is taken to the production area that is specified on the card. In vendor scenarios, you send the Kanban cards to the vendor who ships material based on the number of cards that are received. You receive the shipment using the Kanban receiving process.

You can create Kanban cards that are used multiple times or only once.

Replenishment Requests (Electronic Kanbans)

You create requests when you need to replenish Inventory. Use one of these options to create requests.

You can use the Replenishment Request EIP to replenish components from third-party systems by electronic data collection.

Backflush Controlled

When you record a completion, the system records consumption of components at the WIP locations that are defined for each operation sequence that you backflush. The system compares the on-hand inventory level of the component at the WIP location, after the component has been consumed, to the replenishment point that you establish for the storage location in the Production Replenishment Locations component. If no replenishment point value exists for the WIP location, the system uses the default value for the item from the Define Business Unit Item - Manufacturing: WIP Replenishment page. If the on-hand quantity is below that replenishment point, the system creates a replenishment request in multiples of the value in the Issue Multiple field. This option is useful for assemblies that have a short manufacturing lead-time.

Manual

The manual option uses visual indicators. The indicator might be a light, a gravity feeder, or some other signal to show that the level is low for an item at a WIP location. You use the Create Replenishment Request page to enter the item and WIP location and generate the request.

See Also

PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, "Issuing Material to Production"

Kanban ID Import Integration

You can import Kanban cards and replenishment requests from third-party Kanban planning systems using the Kanban ID Import EIP.

On the Kanban Replenishment Request process page, if you set the Transaction Source field to *External* or *Both,* the system checks whether a third-party Kanban planning system has published any messages (that is, Kanban cards or replenishment requests in XML format). If messages are available, the system processes them. After validating the data, the system assigns a Kanban ID to each request. The requests are available in Flow Production for viewing, printing, and performing transactions.

See Also

Chapter 4, "Maintaining Kanban Cards and Replenishment Requests," Running the Kanban Replenishment Request COBOL Process (FPPAREPL), page 25

Kanban Card and Replenishment Request Printing

You can print or reprint Kanban cards for a range of Kanban IDs, item IDs, or WIP locations. You can either send the output to a printer or create a file. The printed Kanban card includes the Kanban ID, item ID, WIP location, replenishment source (inventory, feeder line, or vendor), and quantity. You can also print labels for situations where you want to attach a reusable Kanban card directly to a container, especially if you are using electronic data collection.

You can print Kanban replenishment requests in two formats: Pull List or Pull Ticket.

The pull list is a list of Kanban IDs with associated details, similar to a pick list. You can print the pull list using specific sort and selection criteria.

Pull tickets are similar to Kanban cards. You print one pull ticket per Kanban ID. Once you issue the material requested by a pull ticket, the system changes the Kanban ID status to *Complete*, as it does for a one-time Kanban card.

See Also

Chapter 1, "Getting Started with PeopleSoft Flow Production," PeopleSoft Flow Production Implementation, page 2

Appendix A, "PeopleSoft Flow Production Report Descriptions," page 43

Common Elements Used in This Chapter

WIP RPL Mode (WIP replenishment mode), **WIP RPL Type** (WIP replenishment type), **WIP RPL Source** (WIP replenishment source), and **WIP RPL Method** (WIP replenishment method)
: Displays the values from the Inventory defaults on the Production Replenishment Locations page or—if the values aren't there—from the item attributes on the Define Business Unit Item - Manufacturing: WIP Replenishment page

WIP Location
: Enter the WIP location. The system displays the number of storage levels that are defined for each storage area. If you don't know which storage location you want, select a storage location field and click the Transfer button to access the Storage Location Search link. The system displays a page where you can search for a storage location at any storage level. Only locations that are defined as WIP locations are displayed.

WIP RPL Status (WIP replenishment status)
: Displays the WIP replenishment status. As you move a Kanban card or replenishment request through the Flow Production business process, the system updates the statuses accordingly. The status indicates where the Kanban card is in the replenishment process. Values are:

- *Canceled*: The Kanban card is taken out of circulation and can't be reopened. You must change the Kanban card or replenishment request to this status manually.
- *Complete*: You can't perform transactions using a Kanban card or a replenishment request in this status, but you can reset the status to *Open.*

If the Kanban card's WIP replenishment type is *One Time*, then the system sets the Kanban card's status to *Complete* once you issue material against the card. Once you complete a Kanban transfer transaction against a replenishment request, the system sets the status to *Complete*. Because all replenishment requests are one-time only, you can't record any additional transactions against a *Complete* replenishment request, but you can reset the status to *Open*. The *Complete* status usually means that all possible transactions against the Kanban have been performed.

- *Dispatched*: This status is used for replenishment requests that are sourced from a vendor.

  Once you have run the Dispatch Replenishment Request process (FPS1000), the system sets the replenishment request status to *Dispatched* and notifies the vendor using the selected dispatch method. This status isn't used for Kanban cards.

- *Hold*: Once the Kanban card or replenishment request is printed, you can change its status to *Hold.*

  You can create transactions for the Kanban card or replenishment request only if you reset it to *Open*.

- *In Process*: This status is used for Kanban cards and replenishment requests that are sourced from a vendor.

  The system sets the Kanban card or replenishment request to this status when it is received from the vendor. If the Kanban card or replenishment request is reusable, then the system sets the status to *Open* once the material is put away in the WIP location. If you are using a one-time Kanban card or replenishment request, the status changes to *Complete* once the material is put away.

- *New*: Kanban cards are created with this status.

  You can't perform transactions against this Kanban card until its status is *Open*. Printing Kanban cards changes the status from *New* to *Open*. Replenishment requests don't use this status.

- *Open*: Once the Kanban card is printed, the system changes its status to *Open.*

  For reusable Kanban cards that have *Feeder* or *Inventory* as the source, you can continue to cycle them between the WIP location and the replenishment source until you manually change the status.

  This is the initial status of a replenishment request. Consequently, you can perform transactions against it right away. You cannot do that with Kanban cards. The system doesn't change the status of replenishment requests when you print them.

WIP RPL Mode (WIP replenishment mode)

Select a mode, which the system uses to determine how replenishment requests are generated for an item. Options are:

- *Backflush Controlled*: When you backflush completions, components are consumed in the WIP location.

When the quantity on hand falls below the replenishment point, the system generates a replenishment request to bring the on-hand quantity back to the replenishment point. The replenishment request is a multiple of the value defined in the Issue Multiple field. For example, if the replenishment point is 60, the on-hand quantity is 30, and the value in the Issue Multiple field is 20, then the system generates a replenishment request for 40 to bring the on-hand WIP location quantity to the replenishment point.

- *Kanban Card:* The replenishment process uses Kanban cards as a manual request for material.

  In this scenario, Kanban cards are created or imported into the system and then printed. A Kanban card is attached to a box of components; as components are used on the production line, you place the Kanban cards in a Kanban holder. The cards are picked up periodically at the WIP location and taken to a Kanban sorting room or to the source location on the card so that the components can be retrieved. Each Kanban card has a Kanban ID.

- *Manual:* When the visual indicator shows that the WIP location needs replenishment, you scan in the item ID and WIP location to generate a replenishment request for the specified value in the Issue Multiple field.

  This request includes the replenishment quantity and source location that is associated with the item and WIP location.

WIP RPL Type (WIP replenishment type)

For Kanban cards, select the type. Options are *One Time* and *Reusable.* The system sets this field to *One Time* for the WIP replenishment modes *Backflush Controlled* and *Manual. Reusable* is the default value for Kanban cards.

Workflow: The system generates a worklist entry that displays the Production Replenishment page and the Item, Quantity, and From/To WIP location fields. You can override the values to complete the transfer. This type is valid only if the WIP replenishment mode is *Backflush Controlled* and the replenishment source is *Inventory.*

WIP RPL Source (WIP replenishment source)

Select to determine which source supplies the WIP location. Options are:

- *Feeder*: A feeder line creates subassemblies that are fed into the main production line.

  Once you have used a certain quantity of the subassemblies, you send a replenishment signal to start production on the feeder line. If you select *Feeder* as the WIP replenishment source, the system makes the WIP Production Area field available for entry. Enter the area that serves as a feeder line for the item. Feeder lines must use production schedules to track production.

- *Inventory*: Replenish the WIP location directly from an inventory location.

  If you select *Inventory* as the WIP replenishment source, the system makes the Source Location field available for entry. Enter the storage location that replenishes this item. The Location field isn’t mandatory but, if completed, it must be a valid location.

- *Vendor*: Use this option to replenish the WIP location by directly receiving purchased components from a vendor.

If you select *Vendor* as the WIP replenishment source, the system makes available the Vendor ID and Vendor Location fields. Enter the Vendor ID and Vendor Location that will directly replenish this item. You can override this prior to dispatch if necessary.

Click the Storage Location Search button to access the Storage Location Search link. The system displays a page where you can search for a storage location at any storage level. Only the locations that are defined as WIP locations appear.

WIP RPL Method (WIP replenishment method)

Select a method to designate how the replenishment request is communicated. This field is available if the WIP replenishment mode is *Backflush Controlled* or *Manual.*

The WIP replenishment methods that are available vary by WIP replenishment source. If the WIP replenishment source is *Inventory,* the *Workflow, Pull Ticket,* and *Pull List* WIP replenishment methods are available.

If the source is *Feeder,* then *Pull Ticket* is the only option. This field is not used if the source is *Vendor.*

Pull Ticket: You create a one-time replenishment request through either a backflush or a manual scan and run the Pull Ticket Print process to print the pull ticket. This is similar to a one-time Kanban card. You scan in the Kanban ID, and the system displays the item, Kanban quantity, source, and WIP location information.

Pull List: A pull list is a list of Kanban requests that you use as you do a pick list. You scan in Kanban IDs to transfer quantities. You run the Pull List/Pull Ticket process (FPS6500) on a scheduled basis to pick up new requests. As with pull tickets, you scan in the Kanban ID from the pull list to transact each request.

Creating Kanban Cards

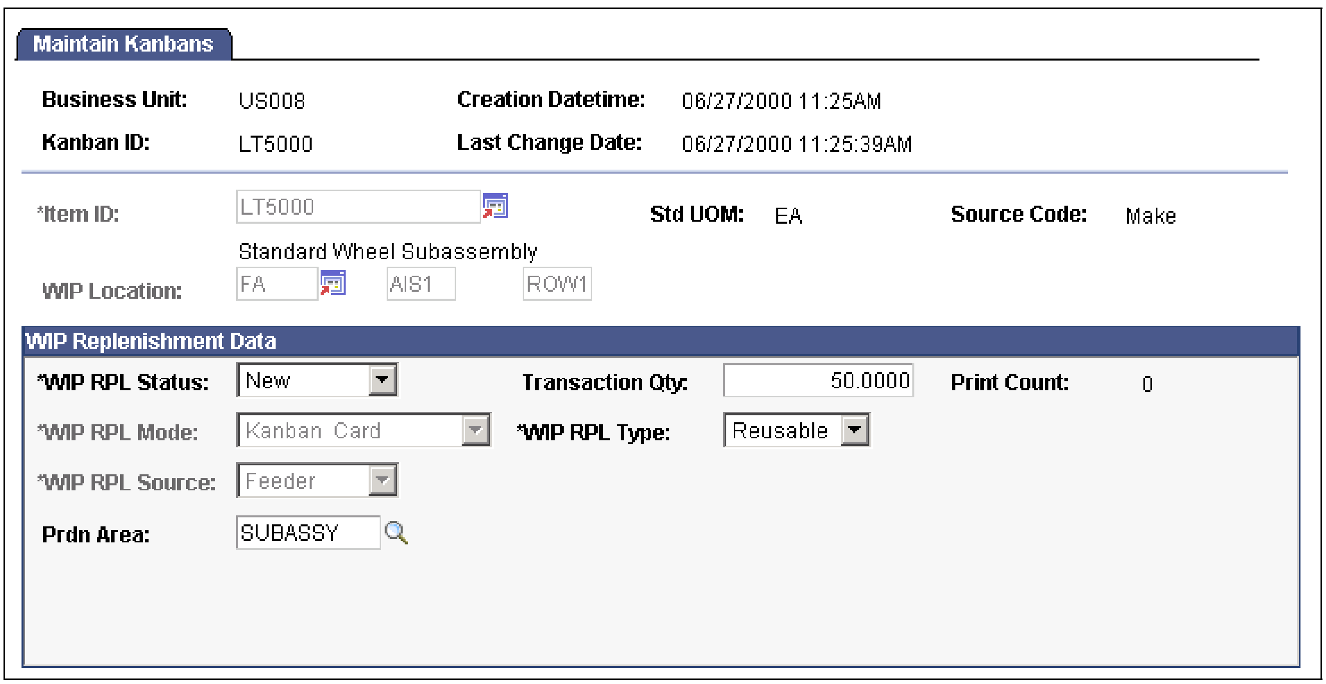
This section discusses how to create Kanban cards.

Pages Used to Create Kanban Cards

Page Name	Object Name	Navigation	Usage
Maintain Kanbans	SF_KANBAN_DTL	Manufacturing Definitions, Kanban, Kanban Cards, Maintain Kanban Cards	Create Kanban cards and maintain Kanban cards and replenishment requests.
Print Kanban Cards	RUN_FPS6510	Manufacturing Definitions, Kanban, Kanban Cards, Print Kanban Cards	Select print options for the Kanban Cards and Kanban Card Labels SQR report (FPS6510).
Kanban Card Range	RUN_FPS6510A	Manufacturing Definitions, Kanban, Kanban Cards, Print Kanban Cards, Kanban Card Range	Select the range of Kanban IDs, item IDs, or WIP locations to be printed on the Kanban Cards and Kanban Card Labels SQR report (FPS6510).

Creating Kanban IDs

Access the Maintain Kanbans page.



Maintain Kanbans page

Adding a Kanban ID

Kanban ID Enter a value for the Kanban ID. If you set up automatic numbering for Kanban IDs, the system uses *NEXT* as the Kanban ID and assigns the next Kanban ID number when you save the Kanban ID.

Transaction Qty (transaction quantity) Enter the amount of material with which to replenish the location each time you use the Kanban card.

Print Count Displays the print count, which the system generates each time you print the Kanban card.

See Also

Chapter 3, "Setting Up PeopleSoft Flow Production," Setting Up Kanban Automatic Numbering, page 11

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Structuring Inventory," Defining and Maintaining Material Storage Locations

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Structuring Inventory," Searching for Material Storage Locations

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Defining Items by Business Unit," Defining Manufacturing Information for an Item

Creating Manual Replenishment Requests

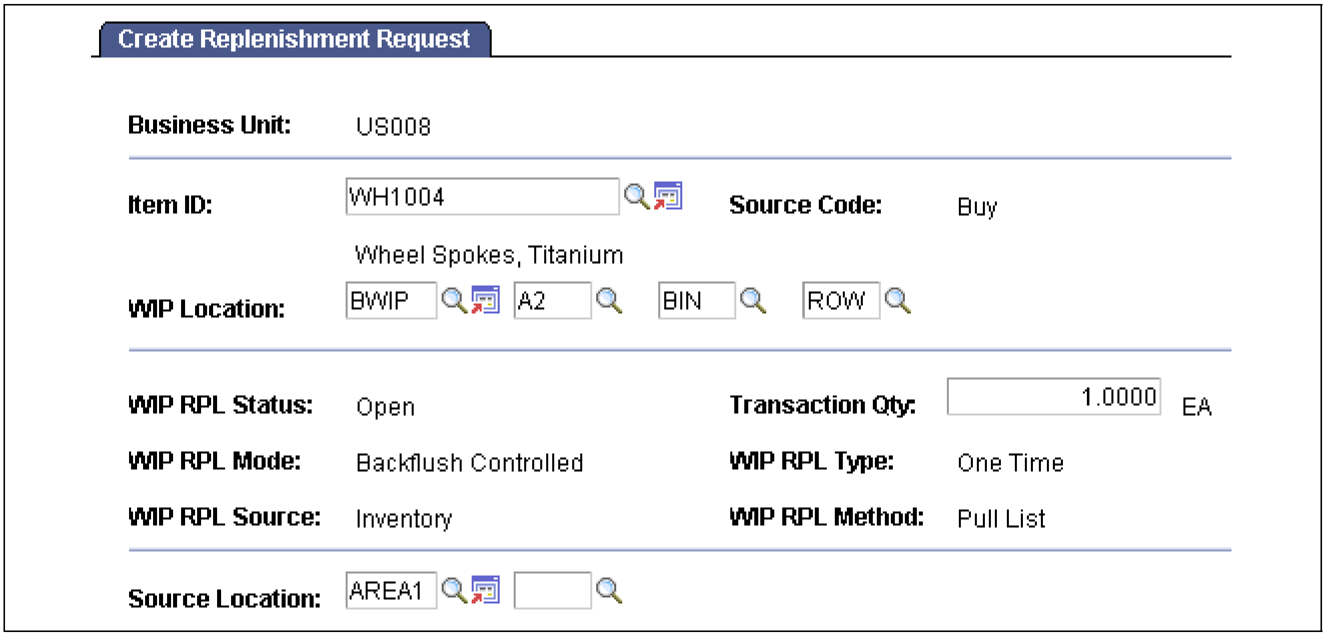
This section discusses how to create manual replenishment requests.

Pages Used to Create Manual Replenishment Requests

Page Name	Object Name	Navigation	Usage
Create Replenishment Request	SF_RPL_REQ_EXPRESS	Manufacturing Definitions, Kanban, Electronic Kanbans, Create Electronic Kanbans, Create Replenishment Request	Manually request replenishment.
Pull Ticket/Pull List Options	RUN_FPS6500	Manufacturing Definitions, Kanban, Electronic Kanbans, Create Electronic Kanbans, Print Pull Ticket/Pull List, Pull Ticket/Pull List Options	Indicate how to print pull tickets and pull lists for the Pull Ticket/Pull List SQR report (FPS6500).
Print Pull Ticket/Pull List - Pull Ticket/Pull List Range	RUN_FPS6500A	Manufacturing Definitions, Kanban, Electronic Kanbans, Create Electronic Kanbans, Print Pull Ticket/Pull List, Pull Ticket/Pull List Range	Select the printing range for the Pull Ticket/Pull List SQR report.

Creating Replenishment Requests

Access the Create Replenishment Request page.



Create Replenishment Request page

Note. The system numbers new replenishment requests when they are saved, so be sure to set up automatic numbering for Kanban IDs before creating replenishment requests.

Transaction Qty (transaction quantity)	Enter the transaction quantity. The quantity appears by default from the Issue Multiple field, which is defined on the Production Replenishment Location page or the Define Business Unit Item - Manufacturing: WIP Replenishment page. You can override the value here.

See Also

Chapter 4, "Maintaining Kanban Cards and Replenishment Requests," Creating Kanban Cards, page 20

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Defining Items by Business Unit," Defining Manufacturing Information for an Item

Chapter 3, "Setting Up PeopleSoft Flow Production," Setting Up Kanban Automatic Numbering, page 11

PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, "Issuing Material to Production," Using the Replenishment Method

Creating Replenishment Requests Using Electronic Data Collection

If you use manual replenishment with electronic data collection, you use the Manual Replenishment page to create replenishment requests. In this scenario, a worker physically inspects the WIP location levels. If the level is low for an item, the worker scans the item and WIP location using a data collection device, and the system generates an electronic data collection replenishment request. Alternatively, the worker can manually enter the request using the Manual Replenishment page.

The Replenishment Request EIP enables third-party systems to create a replenishment request and the message be imported into Flow Production. This EIP is an outbound, batch subscribe, asynchronous message.

Flow Production provides the Replenishment Request Dispatch EIP to enable you to inform vendors of the need to replenish a specific item or location. This EIP is an outbound, batch subscribe, asynchronous message.

This section discusses how to:

- Use the Scan Electronic Kanban request.
- Run the Kanban Replenishment Request COBOL process (FPPAREPL).

See Also

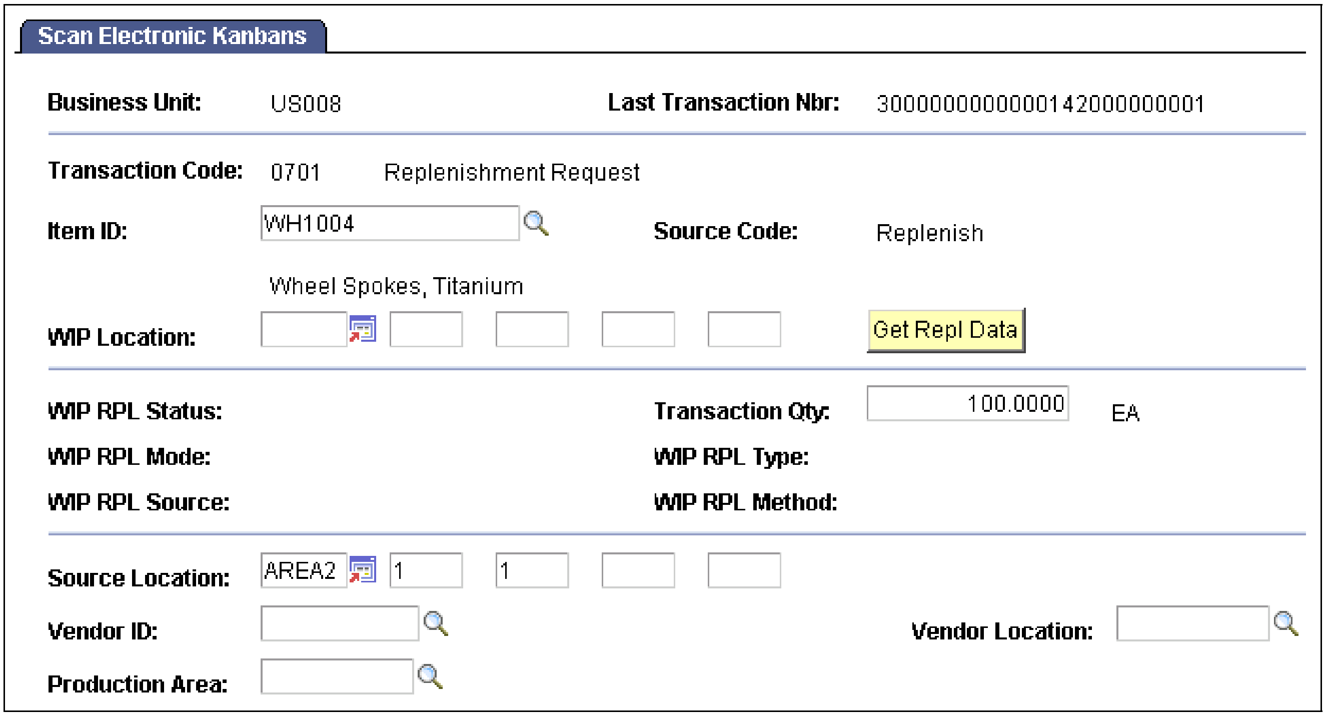
Chapter 1, “Getting Started with PeopleSoft Flow Production,” page 1

Pages Used to Create Replenishment Requests Using Electronic Data Collection

Page Name	Object Name	Navigation	Usage
Scan Electronic Kanbans	BCT_MG_KANBAN_MRR	• Manufacturing Definitions, Kanban, Electronic Kanbans, Scan Electronic Kanbans • SCM Integrations, Create Transactions, Manufacturing, Scan Electronic Kanbans	Generate a manual replenishment request with electronic data collection.
Process Kanbans	BCT_FP_REQREPL	• Manufacturing Definitions, Kanban, Electronic Kanbans, Process Kanbans • SCM Integrations, Process Transactions, Manufacturing, Process Electronic Kanbans	Process replenishment requests. If you use an electronic data collection system, you can run the Kanban Replenishment Request process (to update the system with the replenishment request data that you collect.

Using the Scan Electronic Kanban Request

Access the Scan Electronic Kanbans page.



Scan Electronic Kanbans page

Item ID — Select an item. The system displays the source code and description of the item.

Get Repl Data (get replenishment data) — Click to populate the WIP replenishment fields with default values.

> **Note.** If you save the page without clicking the Get Repl Data button, the system saves the record with the WIP replenishment defaults without displaying the data.

Transaction Qty(transaction quantity) — Enter a quantity for the replenishment request.

Source Location — If sourcing this request from an inventory location, enter the source location.

Vendor ID and **Vendor Location** — Enter the vendor and location if you source the request from a vendor.

Production Area — Enter the production area if you source from a feeder line.

Before you can review and perform transactions on this request, run the Kanban Replenishment Request process.

See Also

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, “Defining Items by Business Unit,” Defining Manufacturing Information for an Item

Running the Kanban Replenishment Request COBOL Process (FPPAREPL)

Access the Kanban Replenishment Request page.

Trans Source (transaction source)

Select the source where transactions originate. Options are:

- *Internal:* Requests are generated internally.

  For example, select this option when using a wedge device or radio frequency unit with electronic data collection.
- *External:* Requests are received from a third-party Kanban planning system.

  Select this option to import Kanban ID Import EIP transactions.
- *Both:* Requests are generated internally and externally.

While you are running the Kanban Replenishment Request process, you can also run the Pull List/Pull Ticket process. This creates only new pull tickets that are generated by the Kanban Replenishment Request process.

After you click Run, select one of these check boxes:

FPPAREPL

Select to run the Kanban Replenishment Request process, which updates the system with the replenishment request data that is collected electronically.

FPRPLREQ

Select to run a multistep process that includes both the Kanban Replenishment Request process and the Pull List/Pull Ticket process.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Process Scheduler

Reviewing Kanban IDs

Use the Review Electronic Kanbans component for both Kanban cards and replenishment requests. This component enables you to review Kanban IDs by item ID or WIP location. You can view all Kanbans in multiple locations for a specific item or for multiple items in a specific location. You can use this component to mass change the status for all selected Kanbans.

This section discusses how to:

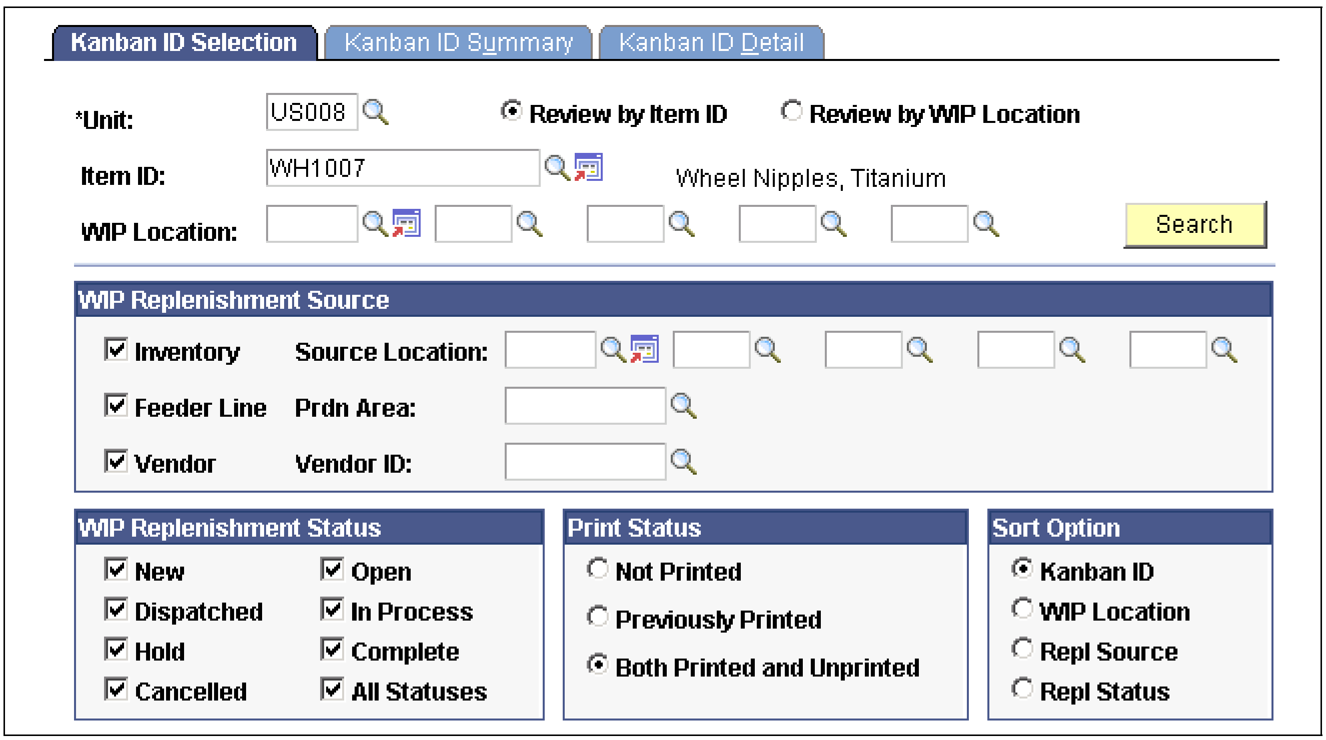
- Select Kanban IDs.
- Review the Kanban ID summary.
- Review the Kanban ID detail.

Pages Used to Review Kanban IDs

Page Name	Object Name	Navigation	Usage
Kanban ID Selection	SF_RVW_RPL_SEL	Manufacturing Definitions, Kanban, Electronic Kanbans, Review Electronic Kanbans, Kanban ID Selection	Choose a range of Kanban IDs to view.
Kanban ID Summary	SF_RVW_RPL_SUM	Manufacturing Definitions, Kanban, Electronic Kanbans, Review Electronic Kanbans, Kanban ID Summary	View summarized replenishment information by Kanban ID.
Kanban ID Detail	SF_RVW_RPL_DTL	Manufacturing Definitions, Kanban, Electronic Kanbans, Review Electronic Kanbans, Kanban ID Detail	View detailed replenishment information by Kanban ID.

Selecting Kanban IDs

Access the Kanban ID Selection page.



Kanban ID Selection page

Review by Item ID Select to retrieve Kanbans by item ID. If you select this option, you must enter an item ID.

Review by WIP Location Select to retrieve Kanbans by WIP location. If you select this option, you must enter a WIP location. If you enter both an item ID and a WIP location, the system selects only the Kanban IDs with that item ID and WIP location.

Search Click to view the Kanbans that match the criteria specified.

WIP Replenishment Source

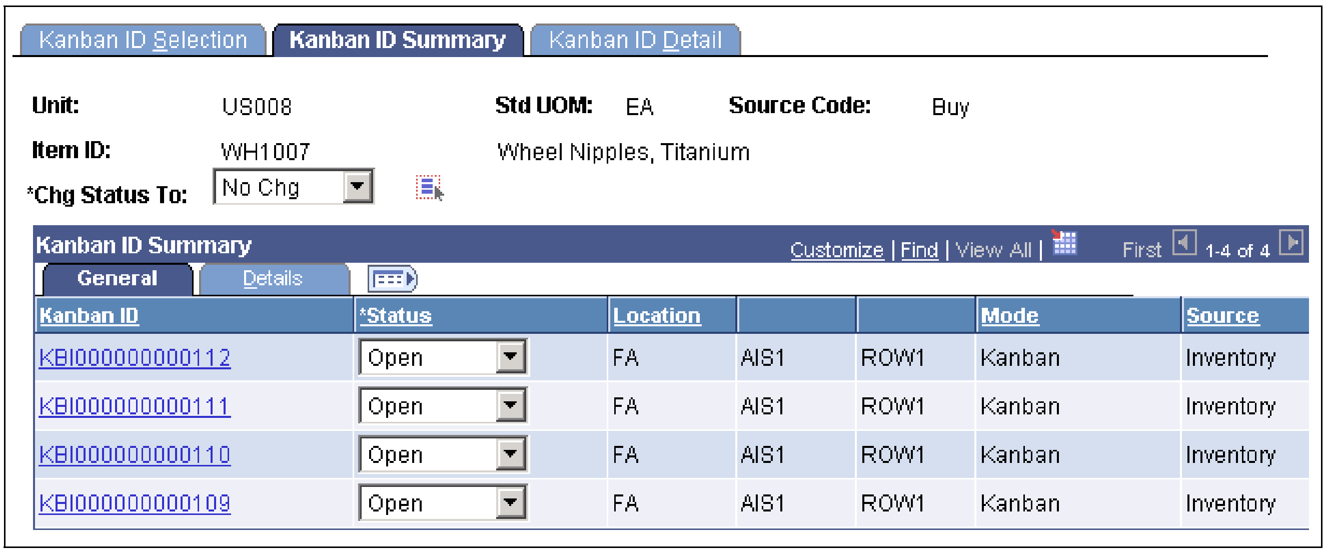
Inventory If you select this check box, then you must enter a source location.

Feeder Line If you select this check box, then you must enter a production area.

Vendor If you select this check box, then you must enter a vendor ID.

Reviewing the Kanban ID Summary

Access the Kanban ID Summary page.



Kanban ID Summary page

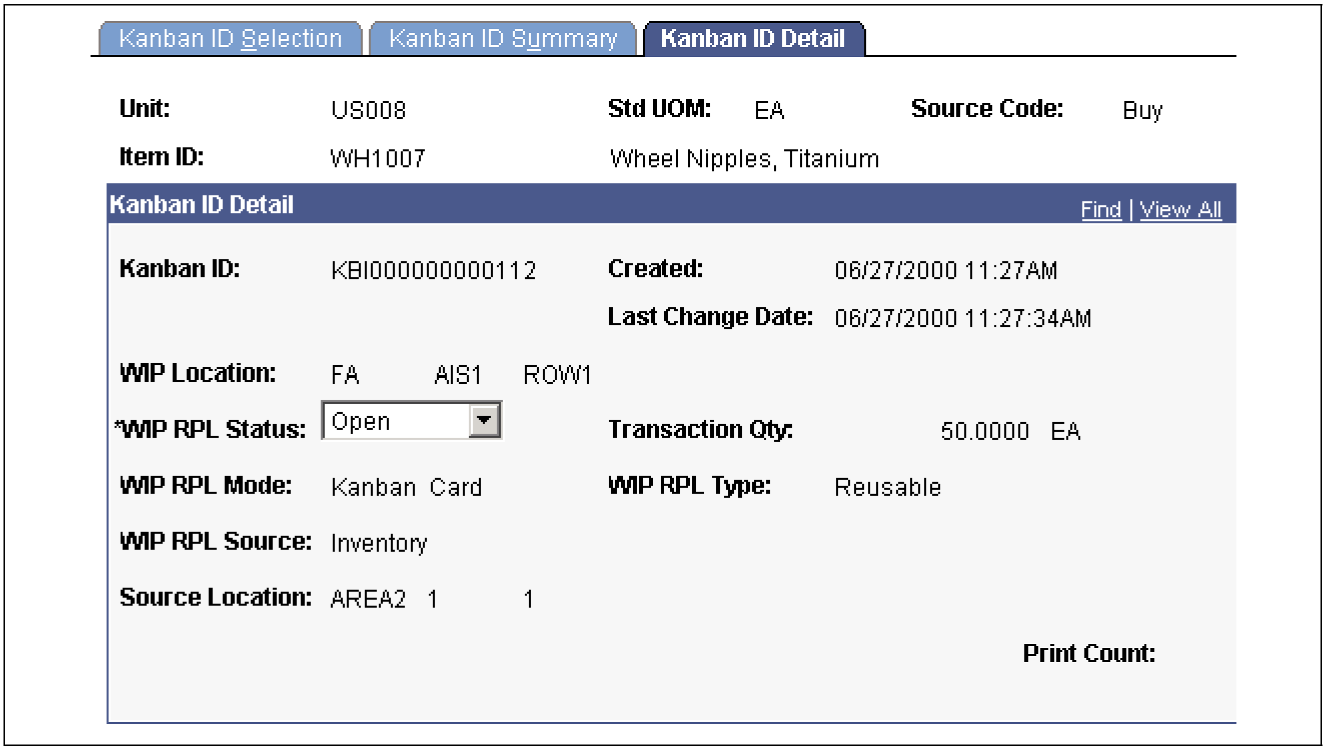
Chg Status To (change status to) Select to perform a mass status change update for all selected Kanban IDs. For example, you can cancel all Kanban cards in a WIP location before adding new cards. Options are *Canceled, Hold, New, No Chg* (no change), and *Open.*

Kanban ID Click to view details of each Kanban card or replenishment request.

Status Select to change the status on individual Kanbans if necessary.

Reviewing the Kanban ID Detail

Access the Kanban ID Detail page.



Kanban ID Detail page

Viewing Detail Information

The system displays different details depending on the type of Kanban ID selected:

Inventory	The system displays the WIP replenishment method and the number of storage levels that are defined for each source location.
Feeder	The system displays the production area.
Vendor	The system displays the vendor ID, vendor location, dispatch method, vendor item ID, and vendor quantity.
WIP RPL Status (WIP replenishment status)	Select to change the status for the Kanban ID, if necessary.

CHAPTER 5

Using Replenishment Sources

This chapter provides overviews of inventory replenishment, vendor replenishment, and Kanban completions processing and discusses how to:

- Manage inventory replenishment.
- Manage vendor replenishment.
- Manage feeder line replenishment.

Understanding Inventory Replenishment

If you are replenishing components from a Inventory location, you use bin-to-bin transfers to move the material. With Flow Production, we provide specific functionality to streamline Kanban transfers.

Understanding the Kanban Transfer Process

You can create Kanban transfers either for Kanban cards or replenishment requests.

If you use Kanban transfers, you must complete the transfer and then run the Inventory Transfer COBOL process (INPTTRFR). This is a good method if you are entering multiple transfers. Express Kanban transfers are best for single transfers as the system updates the database with each transfer and you don't need to run the Inventory Transfer process.

Understanding Kanban Card Transfers

In this scenario, the Kanban card travels back and forth between the WIP location and an inventory storage location. The Kanban card includes the inventory location and Kanban quantity. You take the card to the inventory location and enter or scan the Kanban ID so that it appears on the Kanban Transfer page. Once you enter the Kanban ID, the system provides the WIP location, item, source location, and Kanban quantity. You can override the source location and the quantity.

Replenishment Request Transfers

In this scenario, you create the replenishment request either manually or through backflushing. You can print the Kanban details on a Pull List or Pull Ticket. If you use backflushing, a worklist entry is generated. If you use a Pull List or Pull Ticket, you scan the Kanban ID into the Kanban transfer transaction. The system then provides the destination, source locations, and transfer quantity.

If the replenishment method is Workflow, the system creates a worklist entry after the request is generated. When you select the worklist entry, the system displays the Kanban Transfer page, where you can complete the transfer.

Understanding Vendor Replenishment

If you are using vendor replenishment, you can receive material that is associated with a specific Kanban ID. Purchasing must be installed to use the vendor replenishment features of Flow Production.

You can record Kanban receipts either for Kanban cards or replenishment requests.

Receipt of Kanban Cards

You first must create a purchase order with the PO type *Kanban* and you must create the Kanban cards.

You send the Kanban cards to the vendor, who receives the cards and ships material based on the number of cards received. The Kanban cards include the vendor name, vendor location, item ID, quantity, unit of measure (UOM), and the ship to information so that the vendor knows where to ship the goods.

The cards are then returned on the next shipment from the vendor, and you scan the Kanban IDs so that they appear on the Kanban Receiving page.

You enter the header details, such as the carrier and bill of lading number, and then you can scan multiple Kanban IDs for the receipt. The Kanban ID includes the item ID, vendor, vendor location, quantity, UOM, and WIP location. Each Kanban ID is saved individually. When you receive all Kanban IDs for the carrier and bill of lading, you select the End of Transaction check box and save the page. You can also receive lot- and serial-controlled items.

You run the Receive Load Application Engine process (PO_RECVLOAD), which determines the PO to associate with the receipt using Purchasing defaults that you define at the item level. If multiple open Kanban POs exist, the Receive Load process selects the oldest PO schedule line that is not past due. You can include open past due PO schedule lines by selecting the Include Past Due Kanban POs check box.

The receipt lines are then processed as normal and the inventory is put away. Once you have received a Kanban ID, the system changes the status to *In Process*. When the material is put away, the system sets the status to *Open* if it is a reusable Kanban card. Otherwise, the system sets the status to *Complete.*

Note. When creating a PO for vendor replenishment, you must make sure that you set the PO type on the PO Header page to *Kanban*.

You can view the Kanban ID on the Receiving and Inventory Putaway pages, and you can view the receipt transaction in the Inventory Transaction History tables.

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, “Receiving Shipments,” Running the Receive Load Process

PeopleSoft Enterprise Inventory 9.0 PeopleBook, “Inquiring and Reporting About On-Hand Stock,” Viewing Transaction History

Receipt of Replenishment Requests

You must first create a PO with the PO type *Kanban,* and you must create replenishment requests either manually or by using backflushing. The request includes the replenishment dispatch method, vendor item, and vendor quantity.

Once you create the request, you can review it using the Review Electronic Kanbans component before dispatch, and you can override the vendor and vendor location, if necessary.

Use the Dispatch Vendor Replenishment Request process (FPS1000) to distribute a request based on the dispatch method assigned to the request. You can specify either a single replenishment request or multiple requests for the combination of vendor and vendor location.

Once you run the dispatch process, the system sets the replenishment request status to *Dispatched* and notifies the vendor by the selected dispatch method. The vendor ships the material, and you receive it using the Kanban Receiving process.

You enter the header details, such as the carrier and bill of lading number. Then you can scan multiple Kanban IDs for the receipt. The Kanban ID includes the item, vendor, vendor location, quantity, UOM, and WIP location. Each Kanban ID is saved individually. When you receive all Kanban IDs for the carrier and bill of lading, you select the End of Transaction check box and save the page. You can also receive lot- and serial-controlled items.

You run the Receive Load process to determine the PO to associate with the receipt based on rules defined at the item level. The receipt lines are then processed as normal and the material is put away. Once you receive a Kanban ID, the system changes the status to *In Process* and when the material is put away, the system sets the status to *Complete.*

Note. When creating a Purchase Order for vendor replenishment, you must make sure you set the PO type in the PO Header page to *Kanban*.

You can then view the Kanban ID in the Receiving and Inventory Putaway pages, and you can view the receipt transaction in the Inventory Transaction History tables.

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, “Creating Purchase Orders Online,” Entering Purchase Order Line Details

PeopleSoft Enterprise Inventory 9.0 PeopleBook, “Inquiring and Reporting About On-Hand Stock,” Viewing Transaction History

Understanding Kanban Completions Processing

If you are replenishing a component from a feeder line, you use the Kanban Completions process to initiate the replenishment. You can record Kanban completions either for Kanban cards or replenishment requests.

Kanban Card Completions

You collect the Kanban card from the WIP location and take it to the production area or feeder line that is specified on the card. This card is used as a request to start production of the subassembly, and it is attached directly to the subassembly on the feeder line. At the end of the feeder line, you scan the Kanban ID so that it appears on the Kanban Completions page.

Once the transaction is completed, if processing a one-time Kanban card, the system sets the Kanban status to *Complete*. If processing a reusable Kanban card, the status remains *Open*.

You then need to run the Completions/Scrap Update process (SFPDCDRV) in Manufacturing. Once you run this process, the system logs each Kanban completion transaction, including the Kanban ID, to the Inventory Transaction History table. You can then use the Transaction History Inquiry page to track the Kanban card.

See Also

PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, "Completing Operations and Recording Scrap," Running the Completions Update COBOL/SQR Process (SFPDCDRV)

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Inquiring and Reporting About On-Hand Stock," Viewing Transaction History

Replenishment Request Completions

For Kanban completions, you generate the replenishment request manually or through backflushing. You then print a Pull Ticket with the relevant item, quantity, and production area details.

Note. You can't set up Kanban IDs with the replenishment mode *Pull List* or *Workflow* if a feeder line sources the Kanban IDs.

As with Kanban card completions processing, you print the pull ticket or request to start production, and you attach it to the subassembly on the feeder line. At the end of the feeder line, you scan the Kanban ID so that it appears on the Kanban Completions page.

Once the transaction is completed, the system sets the Kanban status to *Complete.* You then need to run the Completions/Scrap Update process in Manufacturing. Once you have run this process, the system logs each Kanban completion transaction to the Inventory Transaction History table. You can then use the Transaction History Inquiry page to track the Kanban ID of the replenishment request.

See Also

PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, "Completing Operations and Recording Scrap," Running the Completions Update COBOL/SQR Process (SFPDCDRV)

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Inquiring and Reporting About On-Hand Stock," Viewing Transaction History

Managing Inventory Replenishment

This section lists prerequisites and discusses how to:

- Create Kanban transfer transactions.
- Process Kanban transfers.
- Create express Kanban transfers.

Prerequisites

Before you create Kanban transfers, you need to:

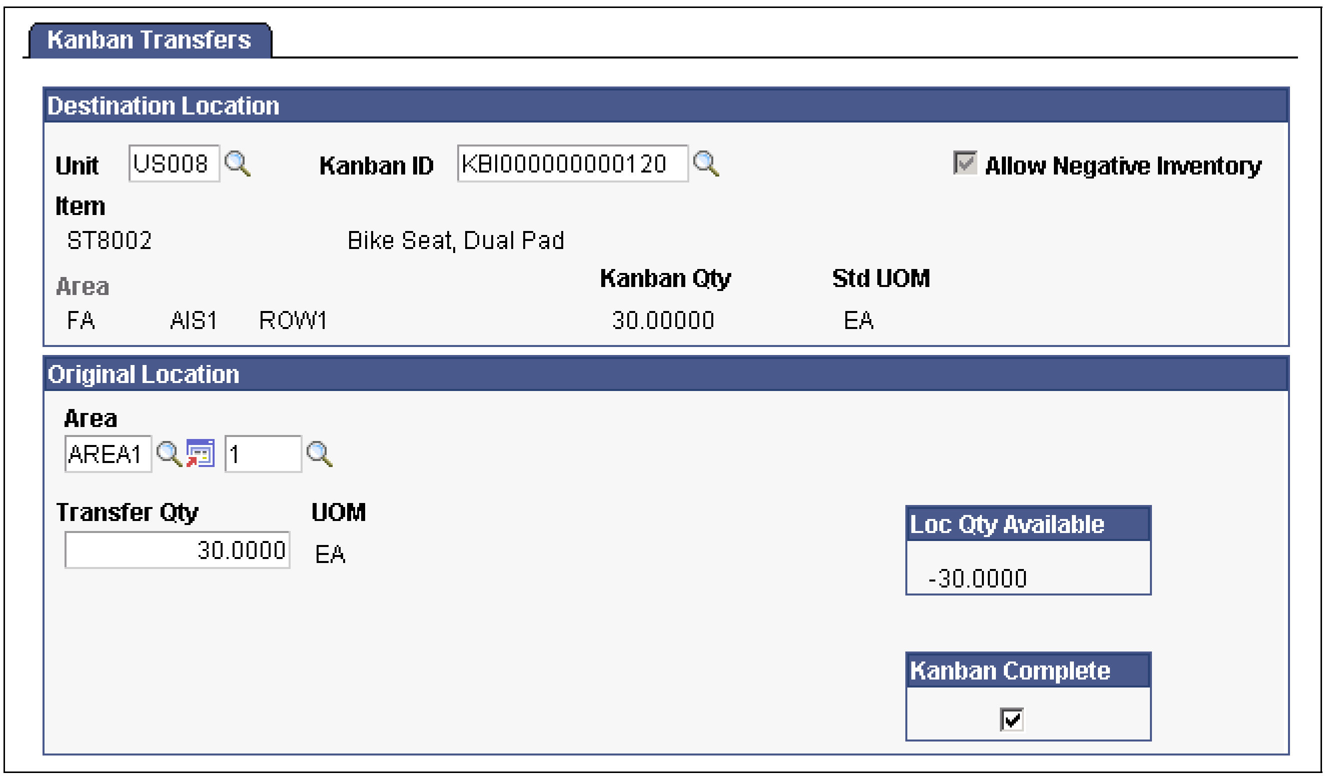
1. Set the replenishment source to *Inventory* for the items that you are transferring.
2. Create Kanban cards or replenishment requests for the items.
3. Print Kanban cards or replenishment requests so that they have the status *Open.*

Pages Used to Manage Inventory Replenishment

Page Name	Object Name	Navigation	Usage
Kanban Transfer	BCT_INV_TRFR	SCM Integrations, Create Transactions, Manufacturing, Scan Kanban Transfers	Enter or scan in Kanban transfers. Use the Item Transfer transaction code (0601).
Inventory Transfers	BCT_INV_REQTRFR	SCM Integrations, Process Transactions, Storage Location Transfer, Inventory Transfers	Update the Inventory records with Kanban transfer transactions.
Kanban Transfers	SF_PRDN_REPLN	Production Control, Process Production, Transact Kanbans, Kanban Transfers	Update the database directly for each Kanban transfer that you enter.

Creating Kanban Transfer Transactions

Access the Kanban Transfers page.



Kanban Transfers page

The system displays the business unit, last control ID, and transaction code. Use the Item Transfer transaction code (0601) for Kanban transfers. The DeAssociate Item from Container transaction code (0604) and the Debuild Full Container transaction code (0607) are used for inventory transfers for components stored in containers.

Enter a Kanban ID and press TAB.

For the original location, the system displays the storage location information, item ID, Kanban quantity, and standard UOM. If you are transferring lot- or serial-controlled items, select a lot ID or serial ID.

You can override the destination location that the system provides.

Select the Kanban Complete check box when the transaction is completed. The system sets the Kanban status to *Complete* for replenishment requests and one-time Kanban cards. Reusable Kanban cards retain the status *Open.* If you leave the check box cleared—for example, if you are transferring material from multiple locations—then the Kanban status remains *Open.*

Note. You can reset the Kanban status to *Open* using the Kanban ID Maintenance page if the Kanban status is accidentally set to *Complete.*

For the destination location, the system provides the storage location information by default.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Making Stock Quantity Adjustments and Transfers Within the Business Unit"

Processing Kanban Transfers

Use the Inventory Transfer process to update the Inventory records with Kanban transfer transactions.

Creating Express Kanban Transfers

Access the Kanban Transfers page.

Destination Location

For the destination location, the system displays the item ID, storage area information, Kanban quantity, and standard UOM. If the item is serial- or lot-controlled, the system displays the serial or lot ID. If the item is stored in containers, the system displays the container ID. The Allow Negative Inventory check box indicates whether negative inventory is allowed for the item.

You can override the original location or the transfer quantity that the system provides. You can view the location quantity available in the Original Location field.

Select the Kanban Complete check box when the transaction is completed. The system sets the Kanban status to *Complete.* If you leave the check box cleared—for example, if you are transferring material from multiple locations—then the Kanban status remains *Open.*

Note. You can reset the Kanban status to *Open* using the Kanban ID Maintenance page if the Kanban status is accidentally set to *Complete.*

Managing Vendor Replenishment

This section discusses how to:

- Select run control options for dispatch vendor replenishment requests.
- Enter selection criteria for dispatch vendor replenishment requests.
- Process email dispatches.
- Use the Receive by Kanban ID transaction.
- Use the Receipt by PO End transaction.

• Load receipts.

Prerequisites

Before you receive replenishment requests by vendor, you need to:

1. Set up the replenishment source to be *Vendor* for the item you are receiving.
2. Create Kanban cards or replenishment requests for this item.
3. Print Kanban cards so that they have the status *Open.*
4. Dispatch replenishment requests so they have the status *Dispatched.*
5. Create a PO with the PO type *Kanban.*

Pages Used to Manage Vendor Replenishment

Page Name	Object Name	Navigation	Usage
Run Controls	SF_RUN_RPL_DSPTCH	Production Control, Process Production, Transact Kanbans, Dispatch Vendor Kanbans	Specify run control options for the Dispatch Replenishment Requests SQR process (FPS1000).
Selection Criteria	SF_RUN_RPL_DSPTCH2	Production Control, Process Production, Transact Kanbans, Dispatch Vendor Kanbans, Selection Criteria	Specify selection criteria for the Dispatch Replenishment Requests process. Print the Replenishment Dispatch report.
Process Email Queue	FP_EMAIL_DISPATCH	Production Control, Process Production, Transact Kanbans, Process Email Dispatches, Process Email Queue	Dispatch replenishment requests that use the email dispatch method and that have failed during a previous run of the Dispatch Replenishment Requests process.
Kanban Receiving	BCT_PO_RCV_KBN	Production Control, Process Production, Transact Kanbans, Kanban Receiving	Use the Receive by Kanban ID transaction (0106) to receive material by Kanban ID. Use the Receipt by PO End transaction (0105) to indicate that you have finished receiving all items for a shipment.

Selecting Run Control Options for Dispatch Vendor Replenishment Requests

Access the Dispatch Vendor Replenishment Requests - Run Controls page.

Note. You need to dispatch replenishment requests that have the WIP replenishment mode *Manual* or *Backflush Controlled*.

If you have a single Kanban request for a vendor, select the Kanban ID for that request. If you have multiple Kanban requests for the same vendor, enter the vendor ID, vendor location, and item ID. The system uses the appropriate default Kanban IDs based on the combination of the vendor, location, and item. The vendor location and item ID are optional.

Entering Selection Criteria for Dispatch Vendor Replenishment Requests

Access Dispatch Vendor Replenishment Requests - Selection Criteria page.

Test Dispatch

Select this option to test the dispatch process before sending a request.

Print Copy

Select this option to print a dispatch report.

Fax Cover Page

Select a predefined fax cover page if you are using Fax as the replenishment dispatch method.

Replenishment Dispatch Methods

Select a replenishment dispatch method. Options are:

- Print
- Fax
- EDX

  The system publishes an XML message which can be used as the basis for generating a Shipping Schedule EDI (shipping schedule electronic data interchange) transaction (862).
- Phone
- Email

If you select Fax or Email, you must set up a fax phone number or email address for the vendor in the Vendor component.

If you select EDX, the system generates an application message using the Replenishment Request Dispatch EIP. You then run the Publish Outbound Message process to publish the message to the vendor.

Repl. Req. Statuses to Incl. (replenishment request statuses to include)

Select an option. If you select Open, the system selects all replenishment requests with an *Open* status. If you want to redispatch a request for a particular date range, select Dispatched. The system selects all dispatched replenishment requests between the dispatch dates that you specify.

Once you run the dispatch process, the system sets the status of all selected requests to *Dispatched,* and the vendor is notified by the selected dispatch method.

If Collaborative Supply Management is installed, once the replenishment is dispatched, vendors can view the request on the internet.

Note. When dispatching replenishment requests using email, it is recommended that you run the multistep process FPDSPTCH, which includes the Email Dispatch Application Engine process (FP_EMAIL_ALL).

See Also

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

PeopleSoft Enterprise Collaborative Supply Management 9.0 PeopleBook, “Implementing Collaborative Supply Management,” Reviewing Kanban Requests

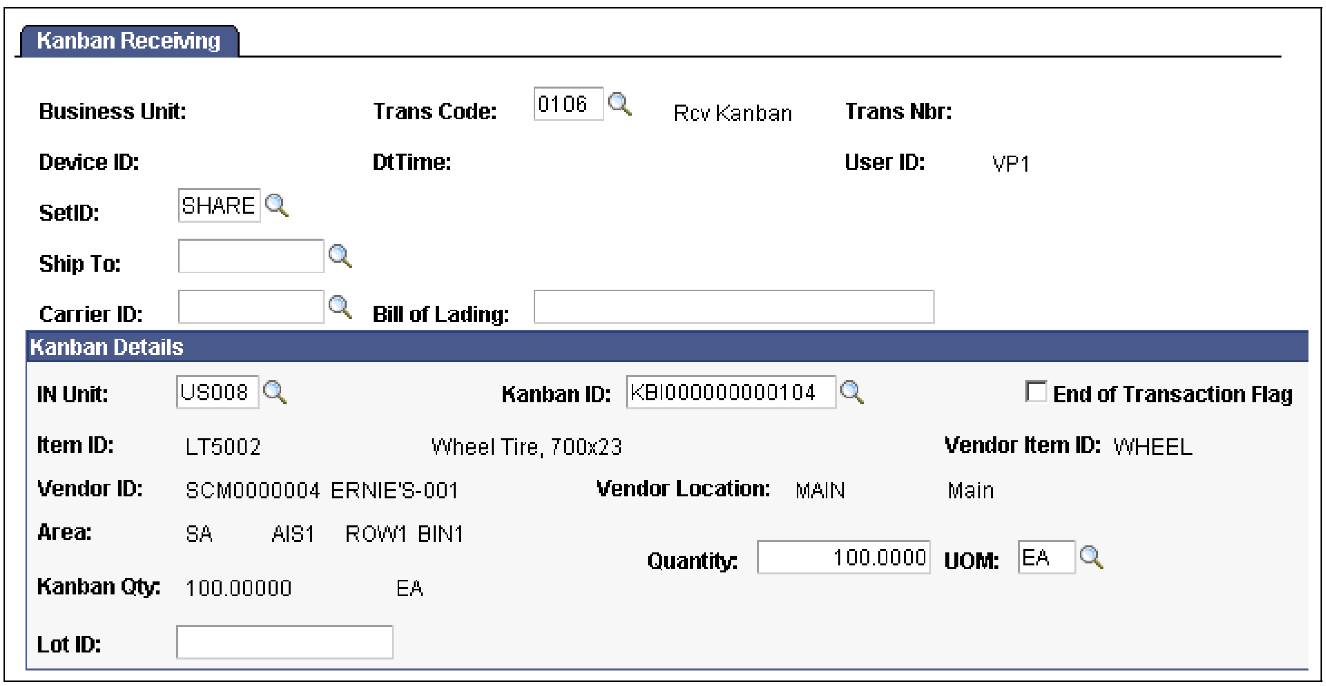
Processing Email Dispatches

Use the Process Email Dispatches - Process Email Queue page to run the Email Dispatch process. This process dispatches replenishment requests that use the email dispatch method. This process is used if you do not run the multistep process FPDSPTCH when dispatching replenishment requests.

Although you can run this process by itself, it is recommended that you run it with the Dispatch Vendor Replenishment Request process.

Using the Receive by Kanban ID Transaction

Access the Kanban Receiving page.



Kanban Receiving page

Enter the transaction code *0106* for the Receive by Kanban ID transaction. The system displays the transaction number, device ID, date and time, and user ID.

Enter a ship to setID, ship to location, carrier ID, and bill of lading.

You can enter a Inventory business unit and Kanban ID. The system displays the item ID, vendor item ID, vendor ID, vendor location, area, and Kanban quantity associated with the Kanban ID.

Enter the quantity received and UOM. If the item is lot-controlled, a lot ID is required. For a serial-controlled item, the serial ID is required.

If you have additional Kanban IDs to receive for the shipment, leave the End of Transaction Flag check box cleared. Once you have received all Kanbans IDs for the shipment, you can select the End of Transaction Flag check box. This automatically generates a 0105 transaction to close out the shipment.

Using the Receipt by PO End Transaction

Access the Kanban Receiving page.

Use the Receipt by PO End transaction (0105) to indicate that you have finished receiving all items for a shipment. If you select the End of Transaction check box while recording a Receive by Kanban ID transaction (0106), you do not need to use this transaction.

Loading Receipts

After using the Kanban Receiving process, you run the Receive Load process to determine the PO to associate with the receipt based on rules defined at the item level. The receipt lines are then processed as normal, and the material is put away. Once you have received the Kanban ID, the system changes the status to *In Process.* When the material is put away, the system sets the status to *Complete.*

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, “Receiving Shipments,” Running the Receive Load Process

Managing Feeder Line Replenishment

This section discusses how to process Kanban completions.

Page Used to Manage Feeder Line Replenishment

Page Name	Object Name	Navigation	Usage
Kanban Completion	BCT_MG_KCPL	• Production Control, Process Production, Transact Kanbans, Kanban Completions, Kanban Completion • SCM Integrations, Create Transactions, Manufacturing, Kanban Completions	Replenish WIP locations from feeder lines. Use this page for both Kanban cards and replenishment requests. Use the Kanban Completion transaction code (0217).

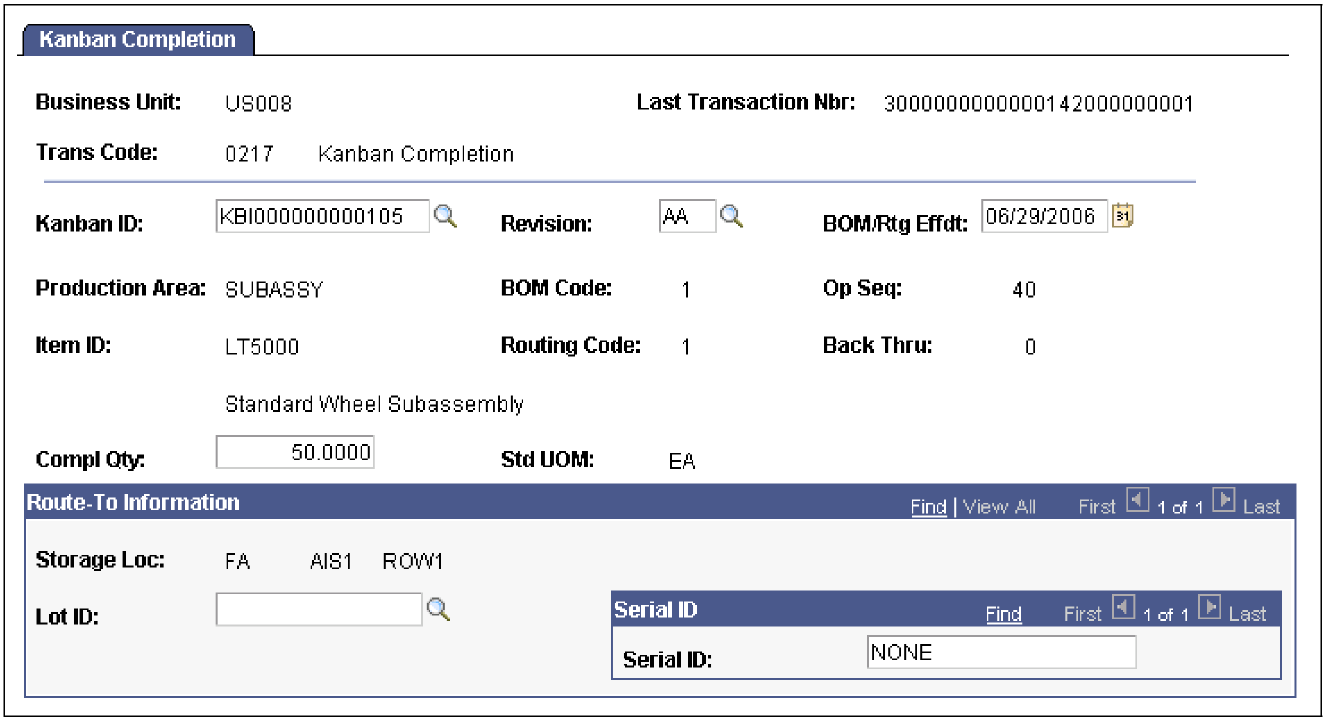
Prerequisites

Before you create Kanban completions, you need to:

1. Set the replenishment source to *Feeder Line* for the items that you are completing.
2. Create Kanban cards or replenishment requests for the items.
3. Print Kanban cards or replenishment requests so that they have the status *Open.*

Processing Kanban Completions

Access the Kanban Completion page.



Kanban Completion page

The system displays the business unit, last transaction number, and transaction code.

Enter the Kanban ID. The system provides the revision, production area, bill of material (BOM) code, operation sequence, item ID, routing code, back-through operation, completed quantity, and standard UOM. The system assigns the current date to the BOM and routing effective date. This date determines which BOM code and routing code are effective for the completion.

You can view the route-to information for the Kanban ID. The system displays the storage location levels defined for the main assembly line WIP location where the subassemblies are delivered when completed.

Enter a lot ID if the end item is lot-controlled.

If the end item is serial-controlled, enter a completed quantity and click the Refresh button. The system then creates as many Serial ID fields as the completed quantity, and you can enter the serial ID for each completed item. The quantity completed must be a whole number for serial-controlled items.

If there is an existing production schedule for the combination of the item, production area, and date, then the system records the completion against the existing production schedule. Otherwise, the system adds a new production schedule.

Run the Completions/Scrap Update process in Manufacturing to update the production and inventory records.

After you click Run, select one of these options:

- Completions/Scrap Update (SFPDCDRV): Select this check box to run the Completions/Scrap Update process.

  This process updates the system with the Kanban completions data that is collected electronically.

- Completions and Print Rpl Reqs (SFCMPRPL): Select this check box to run a multistep process that includes the Completions/Scrap Update process and the Pull List/Pull Ticket Print process (FPS6500).

Once the transaction is completed, the system sets the Kanban status to *Complete* if you are processing a one-time Kanban card or a Pull Ticket. If you are processing a reusable Kanban card, the status remains *Open*.

You can view Kanban completions and correct errors using the Maintain Transactions component under SCM Integrations.

See Also

PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, “Completing Operations and Recording Scrap,” Running the Completions Update COBOL/SQR Process (SFPDCDRV)

PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook, “Understanding SCM Integration”

APPENDIX A

PeopleSoft Flow Production Report Descriptions

PeopleSoft applications offer a wide range of query and reporting possibilities. In addition to the standard reports that we deliver, we also provide reporting tools that you can use to create new reports from scratch.

PeopleSoft Flow Production Reports: General Description

This table lists the Flow Production reports. All the reports that are listed are SQR reports. If you need more information about these reports, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
FPS1000 Replenishment Dispatch Report	Lists replenishment requests to be sent to a vendor. For each vendor, lists vendor address, ship to details, dispatch date, item, description, vendor item ID, and total item quantity. Also for each Kanban ID, lists quantity, unit of measure, creation date and time, and WIP location to be replenished.	• Production Control, Process Production, Transact Kanbans, Dispatch Vendor Kanbans, Run Controls • Production Control, Process Production, Transact Kanbans, Dispatch Vendor Kanbans, Run Selection Criteria	SF_RUN_RPL_DSPTCH
FPS6500 Pull Ticket/Pull List	Prints Pull Tickets and Pull Lists for replenishment requests. Both include Kanban ID, Item, Kanban quantity, replenishment source and WIP location information. Use a Pull Ticket like a one-time Kanban card. A pull list is a list of Kanban requests that you use in a similar manner as a pick list.	• Manufacturing Definitions, Kanban, Electronic Kanbans, Print Pull Ticket/Pull List, Pull Ticket/Pull List Options • Manufacturing Definitions, Kanban, Electronic Kanbans, Print Pull Ticket/Pull List, Pull Ticket/Pull List Range	RUN_FPS6500

Report ID and Report Name	Description	Navigation	Run Control Page
FPS6510 Kanban Cards and Kanban Card Labels	Prints Kanban cards and Kanban card labels. Kanban cards are a physical card used to indicate that a WIP Location needs to be replenished for a specific item. Use Kanban cards to replenish WIP Locations from Inventory locations, Feeder Lines, or Vendors. You can use labels when you want to permanently attach the Kanban Card to a container. Both cards and labels include Kanban ID, Item, Kanban Quantity, replenishment source and WIP location information.	• Manufacturing Definitions, Kanban, Kanban Cards, Print Kanban Cards • Manufacturing Definitions, Kanban, Kanban Cards, Print Kanban Cards, Kanban Card Range	RUN_FPS6510

PeopleSoft Flow Production: Selected Reports

This section contains detailed information pertaining to selected Flow Production reports.

FPS6500 - Pull Ticket/Pull List

Access the Pull Ticket/Pull List Options page.

For the Replenishment Method, select Pull List, Pull Ticket, or Both.

Choose one of the three options for the WIP Replenishment Output Options. Select Create File for Pull Tickets to create an extract file. You can use this file to download Pull Ticket information to label generation software. If you select Print Bar Code, the system prints bar codes for bar coded fields on the Pull Ticket. Select Print Bar Coded Control Flags to print bar code control flag information. Bar Coded Control Flags are item attributes flags. Flow Production uses serial control and lot control flags.

Note. Inventory delivers printer settings for all SQR output to a generic line printer. However, when printing bar coded information on reports on a PCL printer (HP Laser Jet), you must first define the printer type accordingly. You may do this by changing the printer type settings Inventory delivers in SETENV.SQC from LINEPRINTER to HPLASERJET.

Select a Format ID for the extract file. You set up format IDs on the Data Collection Label Setup page.

Enter the File Directory and File Name to which you want to save the Pull Ticket/Pull List file extract.

FPS6510 − Kanban Cards and Kanban Card Labels

Access the Print Kanban Cards page.

Choose one of the three options for the WIP Replenishment Kanban Card Outputs. Select Create File for Kanban cards to create an extract file. You can use this file to download Kanban card information to label generation software. If you select Print Bar Code, the system prints bar codes for bar coded fields on the Kanban Card. Select Print Bar Coded Control Flags to print bar code control flag information. Bar Coded Control Flags are item attributes flags. Flow Production uses serial control and lot control flags.

Note. Inventory delivers printer settings for all SQR output to a generic line printer. However, when printing bar coded information on reports on a PCL printer (HP Laser Jet), you must first define the printer type accordingly. You may do this by changing the printer type settings Inventory delivers in SETENV.SQC from LINEPRINTER to HPLASERJET.

Enter a Format ID for the extract file. You set up format IDs on the Data Collection Label Setup page.

Enter the File Directory and File Name to which you want to save the Kanban Card file extract.

Select a Request Print Status Option: Not Printed, Previously Printed, or Both Printed and Unprinted.

If you print Kanban cards that haven’t been previously printed, the system changes the Kanban ID status to Open from New. Cards that were previously printed display Reprint on the card.

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 *receivables specialist.* 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 *detailed business process.*
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 *course.*

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft 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 *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

collection To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, 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 *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft 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 *class.*

course share set
In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning
In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition
In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data cube
In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.

data elements
Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset
A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft 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 *drop ship*).

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 *population* and *cohort.*

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft 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 *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set	In PeopleSoft 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 *donor pyramid* 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 *Global Distribution System.* Broad-based term to describe all computer reservation systems for making travel plans.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit.*

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

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 *update access.*
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft 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 ADVANCED_SHIPPING_ORDER 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 *pending reservations.* Reservations that have been paid for are referred to as *confirmed reservations.*
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 *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
KVI	Abbreviation for *Known Value Item.* 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 *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* 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 *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
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 *learning management system.* 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 *1*—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 *3C engine.*

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 *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft 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 *Non-Discountable Products.* 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 *need analysis.*

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 *compensation object.*

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 *event.*

PeopleSoft Pure Internet Architecture The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.

performance measurement In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

period context In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

person of interest A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

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 *division* and *cohort.*

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 *giveaways*).
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 *record input value-added tax flag.* 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 *record output value-added tax flag.*

See *record input VAT flag.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data In PeopleSoft 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 *real-time event notification server* 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 *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* 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 *communication key.*

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft 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 *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft 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 polices 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 *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

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 *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header Every PeopleSoft 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 *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse A PeopleSoft 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 *eXtended Process Integrator.* 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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