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# PeopleSoft Enterprise Managing Items 9.0 PeopleBook

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PeopleSoft Enterprise Managing Items 9.0 PeopleBook  
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*Sun's JAXB Implementation – JSDK 1.5 relaxngDatatype.jar 1.0 License*

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# About This PeopleBook Preface

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

This preface discusses:

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

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**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.

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## 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.

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## 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.

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## 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.

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**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.

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### See Also

Oracle's PeopleSoft Customer Connection, [http://www.oracle.com/support/support\\_peoplesoft.html](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.

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## 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                                                                                                                                                                                                                                                                                                                              |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Bold</b>                            | Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.                                                                                                                 |
| <i>Italics</i>                         | Indicates field values, emphasis, and PeopleSoft Enterprise or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.<br><br>We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> . |
| KEY+KEY                                | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.                                                                                                                    |
| Monospace font                         | Indicates a PeopleCode program or other code example.                                                                                                                                                                                                                                                                                    |
| “ ” (quotation marks)                  | Indicate chapter titles in cross-references and words that are used differently from their intended meanings.                                                                                                                                                                                                                            |
| . . . (ellipses)                       | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.                                                                                                                                                                                                                                     |
| { } (curly braces)                     | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( ).                                                                                                                                                                                                                                         |

| Typographical Convention or Visual Cue | Description                                                                                                                                                                                       |
|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| [ ] (square brackets)                  | Indicate optional items in PeopleCode syntax.                                                                                                                                                     |
| & (ampersand)                          | <p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p> |

## 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.

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### Cross-References

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

## Country, Region, and Industry Identifiers

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

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

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

### Country Identifiers

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

## Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

## Industry Identifiers

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

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

## Currency Codes

Monetary amounts are identified by the ISO currency code.

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## Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other 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](mailto:appsdoc@us.oracle.com).

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

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## Common Elements Used in PeopleBooks

|                       |                                                                                                                                                                                                                                                                                                                                                      |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>As of Date</b>     | The last date for which a report or process includes data.                                                                                                                                                                                                                                                                                           |
| <b>Business Unit</b>  | 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.                                                                                                                                                                          |
| <b>Description</b>    | Enter up to 30 characters of text.                                                                                                                                                                                                                                                                                                                   |
| <b>Effective Date</b> | 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. |

|                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Once, Always, and Don't Run</b> | <p>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.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p>                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Process Monitor</b>             | Click to access the Process List page, where you can view the status of submitted process requests.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Report Manager</b>              | 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).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Request ID</b>                  | An ID that represents a set of selection criteria for a report or process.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Run</b>                         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>SetID</b>                       | <p>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.</p> |
| <b>Short Description</b>           | Enter up to 15 characters of text.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>User ID</b>                     | An ID that represents the person who generates a transaction.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |



# PeopleSoft Managing Items Preface

This preface discusses:

- PeopleSoft products.
- Pages with deferred processing.
- Common elements used in this PeopleBook.

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**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.

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## PeopleSoft Products

This PeopleBook refers to these products:

- Oracle's PeopleSoft Enterprise Inventory.
- Oracle's PeopleSoft Enterprise Cost Management.
- Oracle's PeopleSoft Enterprise Purchasing.
- Oracle's PeopleSoft Enterprise Applications Fundamentals.
- Oracle's PeopleSoft Enterprise PeopleTools.
- Oracle's PeopleSoft Enterprise CRM FieldService.
- Oracle's PeopleSoft Enterprise Call Center Applications.
- Oracle's PeopleSoft Enterprise Demand Planning.
- Oracle's PeopleSoft Enterprise Inventory Policy Planning.
- Oracle's PeopleSoft Enterprise Flow Production.
- Oracle's PeopleSoft Enterprise Manufacturing.
- Oracle's PeopleSoft Enterprise Product Configurator.
- Oracle's PeopleSoft Enterprise Supply Chain Management Integration.

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## Pages With Deferred Processing

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

**See Also**

*Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Designer*

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## Common Elements Used in This PeopleBook

|                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>                   | Free-flow text up to 30 characters.                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Effective Date</b>                | <p>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 or panels and batch processes that use the information use the current row.</p> <p>See <i>Enterprise PeopleTools 8.48 PeopleBook: Using PeopleSoft Applications</i></p> |
| <b>Language or Language Code</b>     | <p>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.</p> <p>Language also refers to the language spoken by an employee, applicant, or non-employee.</p>                                                                                                                                                                                                               |
| <b>Process Frequency (group box)</b> | <p>Designates the appropriate frequency in the Process Frequency group box:</p> <p><i>Once</i> executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to <i>Don't Run</i>.</p> <p><i>Always</i> executes the request every time the batch process runs.</p> <p><i>Don't Run</i> ignores the request when the batch process runs</p>                                            |
| <b>Process Monitor</b>               | This link takes you to the Process List page, where you can view the status of submitted process requests.                                                                                                                                                                                                                                                                                                                                                  |
| <b>Report ID</b>                     | The report identifier.                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Report Manager</b>                | This link 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 give you a description of the report and the distribution list).                                                                                                                                                                                                                                       |
| <b>Recipient's</b>                   | Select to have a report print in the language defined for the recipient of the report.                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Request ID</b>                    | A request identification that represents a set of selection criteria for a report or process.                                                                                                                                                                                                                                                                                                                                                               |
| <b>Run</b>                           | <p>Click this button to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.</p> <p>See <i>Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler</i></p>                                                                                                                                                                                                 |
| <b>Run Control ID</b>                | Each run control you create receives a unique run control ID. When you select a process from a menu, a search dialog box appears, asking for a run control ID. If you are in Add mode, enter a new ID for the run control you are about to define. If you are in Update/Display mode, enter an existing run control ID or press Enter and select from the list of available run control IDs.                                                                |

|                          |                                                                                                                                                                                                                                                                                              |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Short Description</b> | Free-flow text up to 15 characters.                                                                                                                                                                                                                                                          |
| <b>Specified</b>         | Select to have a report print in the language that you specify in the Language field.                                                                                                                                                                                                        |
| <b>Status</b>            | the options in this field are <i>Active</i> or <i>Inactive</i> . By linking status and effective date, you can retain historical information and plan future implementation. For auditing purposes, PeopleSoft encourages inactivating data that is no longer in use instead of deleting it. |
| <b>User ID</b>           | The system identifier for the individual who generates a transaction.                                                                                                                                                                                                                        |



# CHAPTER 1

## Getting Started with PeopleSoft Managing Items PeopleBook

This chapter provides an overview of managing items and implementing items.

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### Managing Items Overview

The PeopleSoft Enterprise Managing Items PeopleBook includes these topics:

- Working with items.
- Defining item control values.
- Defining items by setID.
- Defining items by business unit.
- Loading items.
- Using item catalog maintenance.
- Using group purchase organizations.
- Listing delivered workflow.
- Generating PeopleSoft item reports.

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### Implementing Items for PeopleSoft

Implementing items does not require additional table-loading implementation steps; you define items when you set up applications such as PeopleSoft Manufacturing, PeopleSoft Inventory, PeopleSoft Purchasing, PeopleSoft Order Management, PeopleSoft eProcurement, and PeopleSoft Strategic Sourcing. In the planning phase of the implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the PeopleSoft Enterprise Application Fundamentals PeopleBook, with information about where to find the most current version of each.

PeopleSoft also provides component interfaces to help you load data from the existing system into PeopleSoft tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have component interfaces:

| Component                              | Component Interface | Reference                                                                                                                                                                                            |
|----------------------------------------|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Master Item Load Component Integration | IN_MST_ITEM_XLS     | See <i>PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook</i> , “Understanding PeopleSoft Supply Chain Management Enterprise Integration Points,” PeopleSoft SCM Inbound EIPs. |
| Master Item Vendor Load Component      | IN_VND_ITEM_XLS     | See <i>PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook</i> , “Understanding PeopleSoft Supply Chain Management Enterprise Integration Points,” PeopleSoft SCM Inbound EIPs. |
| Item Groups                            | INV_ITEM_GROUPS_CI  | See <a href="#">Chapter 3, “Defining Item Control Values.” Assigning Items to Groups, page 67.</a>                                                                                                   |
| Stocking Periods                       | STOCK_PERIOD_CI     | See <a href="#">Chapter 3, “Defining Item Control Values.” Defining Stocking Periods, page 68.</a>                                                                                                   |
| Units of Measure                       | INV_ITEM_UOM        | See <a href="#">Chapter 4, “Defining Items by SetID.” Assigning a UOM to an Item, page 87.</a>                                                                                                       |
| Universal Item Identifier              | ITM_MFG_UPN_CI      | See <a href="#">Chapter 2, “Working with Items.” Defining Universal Item Identifiers, page 24.</a>                                                                                                   |
| Automatic Serial Numbers               | AUTO_SERIAL_NUM_CI  | See <a href="#">Chapter 5, “Defining Items by Business Unit.” Assigning Serial Numbers Automatically, page 126.</a>                                                                                  |

## Other Sources of Information

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

## See Also

*PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, “PeopleSoft Enterprise Application Fundamentals PeopleBook Preface”

*Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Component Interfaces*

## CHAPTER 2

# Working with Items

This chapter discusses how to:

- Access item ID navigational features.
- Manage inventory by item status.
- Use item prompting.
- Fulfill orders with substitute items.
- Use universal item identifiers.
- Use device tracking.
- Define custom item attributes.
- Use unit of measure (UOM) for item quantity.
- Establish quantity precision and rounding rules for items.
- View item information.
- Use enterprise integration points for items.

---

## Accessing Item ID Navigational Features

This section discusses how to:

- Use zero fill functionality.
- Enter new item IDs quickly.
- Increase search speed for item and product IDs.

## Pages Used to Access Item ID Navigational Features

| Page Name            | Object Name      | Navigation                                                                                                                                                               | Usage                                                                                                                                                                                 |
|----------------------|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Item Search Criteria | ITEM_SEARCH_SP   | Click the Item Search/Item Links button next to any editable Item ID or Product ID field.<br><br>On the Transfer page, click the Item Search or the Product Search link. | Increase the search speed for the item and product IDs when you process inventory movements, sales orders, and material stock requests.                                               |
| Item Vendor Priority | ITM_VNDR_PRTY_HC | Click the Item Vendor Priority link for an item line on the Item Search Criteria page.                                                                                   | View a list of vendors that are already established as suppliers of the item that you want to order. This page can help you make decisions about where to place an order for an item. |

## Using Zero Fill Functionality

A zero fill feature is available for the item ID fields that appear in Update, Update/Display, and Correction item ID search boxes. When you enter item IDs in these search boxes, you can omit the leading zeros, and the system will add leading zeros before activating the page.

## Entering New Item IDs Quickly

To enter new items, use the page transfer options that are available from:

- Create/Update Stock Request (EZ\_ISSUE\_INV) component.
- Define Par Location (CART\_REPLEN\_OPT) component.
- Express Putaway (PUTAWAY\_ENTRY1\_INV) component.

### Item Search/Item Links

On each of these pages, you can click the Item Search/Item Links button next to the Item ID field to access a transfer page, which lists several item-related components: Define Item (INV\_ITEMS\_DEFIN1), Define Business Unit Item (GEN\_ATTRIB\_INV), Copy Item (ITEM\_COPY\_INV), Maintain Item (INV\_ITEMS\_DEFIN1), and Maintain Business Unit Item (GEN\_ATTRIB\_INV).

Please select one of the following links:

[Item Search](#)

---

[Define Item](#)

[Define Business Unit Item](#)

[Copy Item](#)

[Maintain Item](#)

[Maintain Business Unit Item](#)

A sample transfer page

When you select an option from the transfer page, a new session is established in a second browser window. When you complete the selected task, save the session, close the second browser session, and return to the task in the first browser window.

For example, suppose that you're in the process of adding a new order by using the Create/Update Stock Request component and you come across an item ID that is not yet defined. Instead of canceling out of the order, click the Transfer button that is next to the Item ID field, and then click the Define Item link on the transfer page to define the item at the setID level. When you finish defining the item, save the component, close the browser window, and click the Define Business Unit Item link on the transfer page to define the item at the business unit level. Save the component, close the browser window, and resume the order entry task in the first browser window, which displays the Material Stock Request component.

## Increasing Search Speed for Item and Product IDs

Access the Item Search Criteria page.

**Item Search Criteria**

Item ID:

Description:

Item Group:  Family:

Mfg ID:

Mfg Item ID:

Category:

Product ID:

Prod Descr:

**Search**

**Search Results** Customize | Find | View All | First 1 of 1 Last

**Item Information** | Product Information |

| Item ID | Description | Item Group | Family | Category |
|---------|-------------|------------|--------|----------|
|         |             |            |        |          |

Item Search Criteria page

**Note.** If you access the page from the Item Search link, the page name is Item Search Criteria: Item Information. If you access the page from the Product Search link, the page name is Product Search Criteria: Item Information.

The Item Search Criteria component enables you to display a subset of items or products that meet specific search parameters. You must enter at least one search criterion. Wild cards are supported for all of the search parameters.

**Item ID, Item Group, Family, Mfg ID**  
(manufacturing ID), **Mfg ItemID** (manufacturers item ID) **Category, Product ID**

Enter a specific value or a partial value plus an appropriate wild card.

**Description, Prod Descr**  
(product description)

Enter a complete or partial value. This field does not require wild cards and is not case-sensitive.

**Search**

Click to retrieve any items or products that meet the criteria. The results of the search appear on the Item Information and Product Information tabs.

When you select the check box that is next to an item or product that is listed on the tabs, the Item ID or the Product ID field on the original page is automatically populated.

Click the Return button to return to the previous page without making a selection.

**See Also**

*Enterprise PeopleTools 8.48 PeopleBook: Using PeopleSoft Applications*

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## Managing Inventory by Item Status

This section discusses how to:

- Define item status.
- Update item status.
- Define request parameters for the Change Item Status process.
- Inactivate items.

The item status determines which item transactions are performed in PeopleSoft Supply Chain Management applications. By changing an item's status, you control, for example, whether items are included on sales orders, material stock requests, requisitions, and purchase orders. You also control whether an item is picked and shipped, used in production, or replenished. The item status that is defined at the business unit level determines which item transactions are permitted in PeopleSoft Inventory, PeopleSoft Manufacturing, and PeopleSoft Supply Planning. Valid item transactions in PeopleSoft Purchasing are determined by the item status at the setID level, except when the inventory business unit is referenced on requisitions or purchase orders.

### Page Used to Manage Inventory by Item Status

| Page Name          | Object Name | Navigation                                             | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|--------------------|-------------|--------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Change Item Status | RUN_INS4000 | Items, Define Items and Attributes, Change Item Status | Define request parameters for the Change Item Status process (INS4000). The Change Item Status process changes the current status of item definitions to the future status that is defined for the items when the scheduled date of the future status is on or before the date that the process is run. The Change Item Status process generates the Change Item Status Exceptions report, listing the items that are scheduled for inactivation that could not be updated to Inactive status. |

## Defining Item Status

In PeopleSoft Inventory, an item definition at either the setID or the business unit level may have any of these statuses:

### ***Under Initialization***

New item definitions are added to the system tables at the setID level with a status of Under Initialization. The item definition maintains this status until you manually change the current status to Pending Approval on the Define Item - General: Common page. No transactions are permitted while the item definition status is under initialization; however, you can add the item definition to the business unit level and modify the item attributes. After being approved at the setID level, any valid definition that is created at the business unit level while the item has a status of *Under Initialization* or *Pending Approval* is updated to *Active* status.

### ***Pending Approval***

When you complete the item definition at the setID level, you must change the current status from *Under Initialization* to *Pending Approval* manually on the Define Item - General: Common page. In environments that do not require item approval processing, the item status is changed automatically from *Pending Approval* to *Active* when you save the item definition. In environments that process items by using manual approval, the item is available on the Item Approval page. In environments that process items by using workflow approval, setting the item status to *Pending Approval* triggers item approval workflow and makes the item available on the Item Approval page. If the item definition is approved, the item status is updated automatically from *Pending Approval* to *Active* when the Item Approval page is saved. When the system updates an item's status from *Pending Approval* to *Active* at the setID level, any valid definition that is created at the business unit level while the item status is *Under Initialization* or *Pending Approval* are also updated automatically to *Active*. No transactions are permitted while an item's status is *Pending Approval*.

### ***Denied Approval***

If the environment uses item approval processing, you can change the status of an item from *Pending Approval* to *Denied Approval* on the Item Approval page. When an item definition is denied approval, the item's status at both the setID and the business unit levels is changed to *Denied Approval*, and no item transactions are permitted.

### ***Active***

When an item's definition is approved, the system changes the item's status to *Active*, meaning that it's available for all transactions across PeopleSoft Supply Chain Management applications. Items with an *Active* status that is defined at the business unit level are eligible for item transactions in PeopleSoft Inventory, Manufacturing, and Supply Planning. Items with an *Active* status that is defined at the set ID level are eligible for most transactions in PeopleSoft Purchasing; however, items that are included on purchase orders and requisitions that reference an inventory business unit must have an *Active* status at the business unit level.

You can change the status of an item with a *Hold*, *Discontinue*, or *Inactive* status back to *Active* at the setID level on the Define Item - General: Common page or at the business unit level on the Define Business Unit Item - General: Common page.

### ***Hold***

Items with a *Hold* status are restricted to warehouse movement, adjustment, return material authorization (RMA), return to vendor (RTV), receiving, and putaway transactions. You cannot place or fulfill material stock requests

for items with a *Hold* status, nor can these items be used in planning, replenishment, production, purchase order, or requisition transactions. This status does not apply when you are creating orders in PeopleSoft Order Management.

You can change the status of an item with an *Active*, *Discontinue*, or *Inactive* status to *Hold* at the setID level on the Define Item - General: Common page or at the business unit level on the Define Business Unit Item - General: Common page.

### ***Inactive***

Items with *Inactive* status are restricted to warehouse movement transactions, adjustments, RMA and RTV transactions, and receiving transactions. You cannot place or fulfill orders for items with an *Inactive* status, nor can these items be used in planning, replenishment, production, purchase order, or requisition transactions. You can remove item records with an *Inactive* status from the system by using the Inventory Data Purge process (IN\_PURGE).

To change an item to *Inactive* status, enter a future status of *Inactive* and a future status date on the Define Business Unit Item - General: Common page for the business unit and item or on the Define Item - General: Common page, and run the Change Item Status process (INS4000). Items that are defined as manufactured items cannot be inactivated. If you use PeopleSoft Manufacturing, you cannot inactivate an item that is specified on a bill of material (BOM), whether it is defined as an assembly or as a component of an assembly. Nor can you inactivate an item if it has a routing definition, if it is defined in a production area, or if production IDs or schedules exist.

### ***Discontinue***

The *Discontinue* item status enables you to use up (phase out) on-hand quantity of an item. For items with a *Discontinue* status, you can place and fulfill orders, and you can perform warehouse movement transactions, adjustments, receiving, and RMA and RTV transactions. However, these items cannot be used in planning, replenishment, production, purchase orders, or requisition transactions.

If you generate plans by using PeopleSoft Supply Planning, the optimization process begins driving the inventory level of the discontinued item to zero, or as close to zero as possible on the future status date. The optimization process satisfies demand for the item with whatever quantity is on hand and does not create any new planned orders. This process determines a projected use-up date, which theoretically is the quantity that is on hand when the discontinued item is consumed. You can use the projected use-up date as the obsolete date for the component of the BOM. If you do not modify the obsolete date for the component, and if you use substitute items, one of the substitutes for the discontinued item on the BOM substitution list can replace it on that particular production order or schedule. If no substitute items are defined for the discontinued item, the discontinued item is short. If you use PeopleSoft Manufacturing, you can always add production IDs and production schedules manually for a discontinued item if additional quantity on hand is required.

You can change the status of an item with an *Active*, *Hold*, or *Inactive* status to *Discontinue* at the setID level on the Define Item - General: Common page or at the business unit level on the Define Business Unit Item - General: Common page.

See [Chapter 4, “Defining Items by SetID,” Approving Item Definitions, page 84.](#)

See [Chapter 2, “Working with Items,” Inactivating Items, page 12.](#)

See [Chapter 2, “Working with Items,” Updating Item Status, page 10.](#)

## Understanding Item Status Requirements by Transaction Type

Item definitions with a status of *Under Initialization*, *Pending Approval*, or *Denied Approval* cannot be used in a transaction within the PeopleSoft system. Only items with a status of *Active*, *Hold*, *Discontinue*, or *Inactive* are eligible for transactions and only *Active* items are eligible for all transactions. This list details item status requirements by type of transaction.

|                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Order Transactions</b>                                                                        | Include all transactions that involve creating or modifying sales orders, material stock requests, or express issues. Only items with a status of <i>Active</i> or <i>Discontinue</i> are valid for these transactions, and only these items appear in the associated item prompts.                                                                                                                                     |
| <b>Fulfillment Transactions</b>                                                                  | Include all transactions that involve picking, packing, and shipping orders and material stock requests. Only items with a status of <i>Active</i> or <i>Discontinue</i> are valid for these transactions, and only these items appear in the associated item prompts.                                                                                                                                                  |
| <b>Warehouse Movement Transactions</b>                                                           | Include all transactions that involve material transfer from one storage location to another within a business unit. Items with a status of <i>Active</i> , <i>Hold</i> , <i>Discontinue</i> , and <i>Inactive</i> are valid for these transactions, and only these items appear in the associated item prompts.                                                                                                        |
| <b>Adjustment Transactions</b>                                                                   | Include all transactions in which the system’s record of the quantity that is on hand for a given storage location is modified to reflect a physical count of the storage location’s quantity or miscellaneous adjustments. Items with a status of <i>Active</i> , <i>Hold</i> , <i>Discontinue</i> , and <i>Inactive</i> are valid for these transactions, and only these items appear in the associated item prompts. |
| <b>RMA (return material authorizations) and RTV Transactions (return-to-vendor transactions)</b> | Items with a status of <i>Active</i> , <i>Hold</i> , <i>Discontinue</i> , and <i>Inactive</i> are valid for return material authorizations and return-to-vendor transactions, and only these items appear in the associated item prompts.                                                                                                                                                                               |
| <b>Planning Transactions</b>                                                                     | Items with a status of <i>Active</i> , <i>Hold</i> , and <i>Discontinue</i> are valid for PeopleSoft Supply Planning transactions, and only these items appear in the associated item prompts. If the item status is <i>Discontinue</i> or if the demand is beyond the item’s future discontinue date, PeopleSoft Supply Planning does not create new planned orders for the item.                                      |
| <b>Replenishment Transactions</b>                                                                | Only items with a status of <i>Active</i> are valid for replenishment transactions, and only these items appear in the associated item prompts.                                                                                                                                                                                                                                                                         |
| <b>Manufacturing Transactions</b>                                                                | Items with a status of <i>Active</i> , <i>Hold</i> , and <i>Discontinue</i> are valid for manufacturing transactions (such as BOM and routing maintenance, production area and item maintenance, production ID and production schedule maintenance, picking transactions, and completions), and only these items appear in the associated item prompts.                                                                 |
| <b>Receiving Transactions</b>                                                                    | Items with a status of <i>Active</i> , <i>Hold</i> , <i>Discontinue</i> , and <i>Inactive</i> are valid for receiving transactions, which include purchase order receiving, interunit transfer receiving, and RMA receiving. Only these items appear in the associated item prompts.                                                                                                                                    |

**Putaway Transactions**

Items with a status of *Active*, *Hold*, and *Discontinue* are valid for putaway transactions, and only these items appear in the associated item prompts.

**Purchase Orders and Requisitions**

Items with a status of *Active* are valid for purchase orders and requisitions, and only these items appear in the associated item prompts.

This table summarizes the item status requirements for PeopleSoft Supply Chain Management transactions. The status can be *Active*, *Hold*, *Discontinue*, or *Inactive*. An X indicates that the item status is eligible for the transaction in the first column.

| Transactions                                                      | Active | Hold | Discontinue | Inactive |
|-------------------------------------------------------------------|--------|------|-------------|----------|
| All sales order, material stock request (MSR), and Express Issue. | X      |      | X           |          |
| Picking and shipping.                                             | X      |      | X           |          |
| Warehouse movements.                                              | X      | X    | X           | X        |
| Adjustments.                                                      | X      | X    | X           | X        |
| RMA and RTV.                                                      | X      | X    | X           | X        |
| Supply planning.                                                  | X      | X    | X           |          |
| Replenishment.                                                    | X      |      |             |          |
| Manufacturing.                                                    | X      | X    | X           |          |
| Receiving.                                                        | X      | X    | X           | X        |
| Putaway.                                                          | X      | X    | X           |          |
| Purchase order and requisitions.                                  | X      |      |             |          |

## Updating Item Status

You can update an item's current status manually, or you can update it by scheduling a status change on a future date and running the Item Change Update process to apply the change on the appropriate date. The technique that you choose depends on the status change that you want to make and when you want to make it.

## New Items

New item definitions are added to the system tables in *Under Initialization* status. When you complete the item definition at the setID level, you must manually change the current status from *Under Initialization* to *Pending Approval* on the Define Item - General: Common page. In environments that do not require item approval processing, the item status automatically changes from *Pending Approval* to *Active* when you save the Define Item - General: Common page. In environments that use item approval processing, setting the item status to *Pending Approval* triggers item approval workflow, if it is set up, and makes the item available on the Item Approval page. If the item definition is approved, the item status is updated automatically from *Pending Approval* to *Active* when the Item Approval page is saved.

No transactions are permitted while the item definition has *Under Initialization* or *Pending Approval* status; however, you can add the item definition to the business unit level and modify the item attributes. After they are approved at the setID level, either automatically or manually on the Item Approval page, any valid business unit level definitions that are created while the item status is *Under Initialization* or *Pending Approval* are updated automatically to *Active* status.

## Approved Items

When an item definition is approved, either automatically or manually through the Item Approval page, you can manually change the item's current status to *Hold* or *Discontinue* or back to *Active* at the setID level on the Define Item - General: Common page or at the business unit level on the Define Business Unit Item - General: Common page. Manual changes to an item's current status that are made at the setID level do not affect the current status of item definitions at the business unit level. However, you can quickly copy the current status of the item at the setID level on the Define Item - General: Common page to any business units for which the item is defined; you do this by clicking the Copy button to access the Copy SetID to BU Item Status page.

## Items with Future Status Changes

You can enter a future status and date for an item at the setID or business unit level and run the Change Item Status process (INS4000) on or after the scheduled date to execute the status change. In addition to *Hold*, *Discontinue*, and *Active*, you can change an item's status to *Inactive* with this method.

You can change the future status of an item at the business unit level on the Define Business Unit Item - General: Common page or at the setID level on the Define Item - General: Common page. Future status changes to *Discontinue*, *Hold*, or *Active* items that are scheduled for the setID apply only to the item definition at the setID level unless you copy the status modifications to the business unit level.

## See Also

[Chapter 2, "Working with Items," Inactivating Items, page 12](#)

## Defining Request Parameters for the Change Item Status Process

Access the Change Item Status page.

### *All* and *Specific*

Run the Change Item Status process for all business units, or select a specific business unit.

When the process runs for a specific business unit, all items that are in the business unit and have a future status date that is before or equal to the process date are processed. In addition, all items that are at the setID level (for the setID that is associated with the business unit) and have a future status date that is before or equal to the process date are processed.

If you select all business units, all items that are in each defined business unit and have a future status date before or equal to the process date are processed.

In addition, all items that are in each setID and have a future status date that is prior to or equal to the process date are processed.

The Change Item Status process updates the current status and current status date for each item that is processed.

A status change for an item at the setID level does not affect the status of an item that is defined in business units unless you explicitly update the future status of the item at the business unit level.

A status change for an item at the business unit level does not affect the status of the item that is defined at the setID level unless you explicitly update the future status of the item at the setID level.

---

**Note.** If all items that are scheduled for inactivation are successfully updated to *Inactive* status, the Change Item Status process generates a no exception report.

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## Inactivating Items

You cannot directly update an item's current status to *Inactive*. Instead, enter a future status of *Inactive* with a corresponding effective date of the status change and run the Change Item Status process. The Change Item Status process ensures that items that are scheduled for inactivation meet system requirements for inactivation across PeopleSoft Supply Chain Management products.

If the item meets all requirements for inactivation, the Change Item Status process changes the current status to *Inactive*. Any items that are scheduled for inactivation that do not meet system requirements for inactivation are included on the Change Item Status Exception report.

You can change the future status of an item to *Inactive* at the business unit level on the Define Business Unit Item - General: Common page or at the setID level on the Define Item - General: Common page. To inactivate an item at the setID level, the Change Item Status process verifies that the item is defined as *Inactive* in all business units for which the item exists. If one business unit has the item with a status that is other than *Inactive*, the setID status change to *Inactive* does not take place. The Change Item Status exception report lists all the business units for which the status is not *Inactive*. You must explicitly change the business unit status to *Inactive* for these business units for the setID item status to be changed to *Inactive*. To inactivate the item only for a specific business unit, enter a future status of *Inactive* and a future status date on the Define Business Unit Item - General: Common page.

---

**Important!** Some items cannot be inactivated. If an item that is defined for a business unit is used in PeopleSoft Manufacturing on the Define Business Unit Item - General: Costing Page (Used for MFG option), it cannot be inactivated at the business unit or the setID level. If you set the future status of a used-for-manufacturing item to *Inactive*, an error message appears.

---

## Requirements for SetID Item Inactivation

The Change Item Status process validates that the setID item is eligible for *Inactive* status. To be eligible for *Inactive* status, the status for the item in each referenced business unit must be *Inactive*.

## Requirements for Business Unit Item Inactivation

The Change Item Status process validates that the business unit item is eligible for *Inactive* status. For the business unit item to be eligible for *Inactive* status, these conditions must be met in each of the PeopleSoft Supply Chain Management applications that the system includes:

- PeopleSoft Inventory.
  - No non-shipped demand for the item exists in the inventory business unit.
  - No un-interfaced replenishment requests for the item exist in the inventory business unit.

- No staged receipts or in-transit transactions exist for the item.
- No par locations in the inventory business unit define the item as a stock item.
- PeopleSoft Purchasing (for purchased transactions that reference the inventory business unit of the item that is scheduled for inactivation).
  - No open requisitions exist for the item.
  - No open purchase orders exist for the item.
  - No contract lines reference the item.
  - No open RFQs (requests for quotes) exist for the item.
  - No incomplete PO Build (purchase order) records exist for the item.
  - No un-interfaced receipts exist for the item.
  - No planned orders that are not sourced exist for the item.
- PeopleSoft Order Management.
  - No open sales orders that are to be sourced from the inventory business unit include the item.
- PeopleSoft Manufacturing (for manufacturing transactions that reference the manufacturing business unit and the inventory business unit of the item that is scheduled for inactivation)
  - No BOMs exist for which the item is an assembly or a component of the assembly.
  - No routing definitions exist for the item.
  - No production areas have the item that you want to inactivate assigned to them.
  - No production IDs or production schedules exist for the item.

### See Also

Chapter 2, “Working with Items,” Defining Item Status, page 7

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## Using Item Prompting

To help keep large item masters manageable at the transaction level, PeopleSoft item prompts are designed to display only items that are valid for the transaction that you are performing. Items are filtered by status of the item at the business unit level. If the status of an item does not meet the status requirement of the transaction, the item is not included in the values that are accessed from the Item ID field on the transaction page.

### See Also

Chapter 2, “Working with Items,” Defining Item Status, page 7

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## Fulfilling Orders with Substitute Items

This section lists common elements and discusses how to:

- Create item substitution definitions.

- View substitution options from item available inquiries.
- View an item's substitution definition at the setID level.
- View an item's substitution definition at the business unit level.
- Enable item substitutions for an order line.
- Use item substitutions during picking.

When sufficient quantity of a requested item is unavailable, companies often fill the order by using an appropriate substitute item. PeopleSoft applications support this business practice when the order is entered and when the order is picked. If an item is unavailable, you can quickly access a list of appropriate substitutes at the time of order entry and suggest an alternative to the customer. Additionally, you can print a list of substitute items on the picking plan for orders that permit substitutions, enabling the picking staff to make substitutions as required.

### See Also

*PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Understanding PeopleSoft Manufacturing,” Item Substitution

*PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, “Using Purchase Order Sourcing,” Manually Selecting Requisitions for Sourcing

*PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, “Setting Up Products,” Establishing Product Alternates

## Common Elements Used in This Section

|                                   |                                                                                                                                                                                                                                                                |
|-----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Priority</b>                   | The substitute item with the highest priority (the lowest number) is substituted first. Priority doesn't need to be sequential, though it must be greater than zero. PeopleSoft applications display, print, and suggest substitute options in priority order. |
| <b>Start Date and End Date</b>    | Indicate when the substitute item becomes or ceases to be a valid substitution option.                                                                                                                                                                         |
| <b>Sub Item</b> (substitute item) | The Item ID and item Description of the substitute item appear.                                                                                                                                                                                                |

## Pages Used to Fulfill Orders with Substitute Items

| Page Name                              | Object Name        | Navigation                                                                                                                                                                                                                                                       | Usage                                                                                                            |
|----------------------------------------|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|
| Substitute Items (setID level)         | INV_SUB_ITEM_SEC   | Enter an item ID on the Availability Inquiry Selection page (Inventory, Manage Inventory, Review Inventory Balance Info, Item/Product Availability) and click the Item Search/Item Links button next to the Item ID field. Then click the Substitute Items link. | View an item's substitution definition at the setID level and, if appropriate, select an alternate item.         |
| Substitute Items (business unit level) | INV_BU_SUB_ITM_SEC | Enter an item ID on the pages in the Material Stock Request component or the Express Issue page, and click the Transfer button next to the Item ID field. On the Transfer page, click the Substitute Items link.                                                 | View an item's substitution definition at the business unit level, and if appropriate, select an alternate item. |

## Creating Item Substitution Definitions

If you want to make item substitutions either at the time of order entry or as the order is physically picked, you must first create item substitution definitions. An item substitution definition specifies what items can replace the originally requested item.

To create an item substitution definition:

1. Define substitute items at the setID level.

When you define an item at the setID level, you can also define appropriate substitutions for the item on the Define Item - Substitutes page. For each substitute item, define:

- The substitute item's priority relative to other substitute options.
- A start and end date specifying when the substitution is valid.
- A conversion rate in the standard UOM specifying how many substitute items are required to replace the originally requested item.

- The transaction areas for which the substitute item is valid: shipments, manufacturing, or procurement.

Implementation tip: Use the Substitute Item page to create the broadest substitution definition that is possible, and then restrict the definition at the business unit. The substitution definition that is established for the setID can be modified to meet the requirements of the business unit on the Define Business Unit Item - Substitutes page. However, you cannot add substitute items to the substitution definition at the business unit level unless they were previously defined for the setID. At the business unit level, you can only remove substitute items from the substitution definition or modify their attributes. Any items that are included in the substitution definition at the setID level that are not defined for the business unit are automatically excluded from the substitution definition at the business unit level.

You can copy the item substitution definition at the setID level to the business unit level. For established business units, you can copy the item substitution definition from the setID to existing business units by using the Copy to Business Unit link on the Substitute Item page. Only substitution definitions for items that are defined in the business unit are copied. You can use the Copy Substitutes option on the Item Copy page to copy items within a setID.

## 2. (Optional) Modify the item substitution definition for the business unit.

Use the Define Business Unit Item - Substitutes page to modify the substitution definition that is created for the setID to meet the needs of a given business unit. For example, if a business unit no longer stocks an item that is defined as a valid substitute, then you can delete the item from the substitution definition at the business unit level. If an item can be used as a substitute for shipments in one business unit but not in another, the Use for Shipments option can be changed accordingly. You can copy the substitution definition for an item at the set ID level to the business unit by using the Copy to Business Unit link on the Define Item - Substitutes page or the Copy SetID Substitutes link on the Define Business Unit Item - Substitutes page.

## Viewing Substitution Options from Item Availability Inquiries

When viewing item availability, you can quickly check availability for any substitutes that are defined for an item. In PeopleSoft Order Management, you can view possible item substitutions for an order line to help you decide whether to permit item substitutions during fulfillment processing. In PeopleSoft Inventory, you can view and select valid item substitutions when creating material stock requests and express issues.

The ability to view substitution options is provided on the Availability Inquiry Selection page, the Express Issue page, and all pages that are in the Material Stock Request component. To view an item's substitution definition from these pages, enter an item ID and click the Transfer button that is next to the Item ID field. On the Transfer page, click the Substitute Items link to access the Substitute Items page. Depending on the point of access, you view the item's substitution definition at either the setID or business unit level.

## Viewing an Item's Substitution Definition at the SetID Level

Access the Substitute Items page.

**Substitute Items**

**SetID:** SHARE    **Item ID:** GR8000    **Standard Unit of Measure:** EA  
 Gear, Sugishita

| Substitute Item    Usage  First 1 of 1 Last |          |          |             |            |            |                 |         |
|--------------------------------------------------------------------------------------------------------------------------------|----------|----------|-------------|------------|------------|-----------------|---------|
|                                                                                                                                | Priority | Sub Item | Description | Start Date | End Date   | Conversion Rate | Std UOM |
| <input type="checkbox"/>                                                                                                       | 1        | GR8001   |             | 01/01/2000 | 12/31/2099 | 1.00000000      |         |

Substitute Items page (SetID)

The Substitute Items page shares the same object name as the Copy Set ID Substitute Items page.

Click the Return button to close the page without selecting a substitution.

Select the check box on the row of a substitute item if you want to populate the Item ID field on the previous page with the substitute item's item ID.

**Conversion Rate**                      Specifies the factor to convert the transaction quantity to the items standard UOM.

---

**Note.** The conversion rate can be different at the setID, business unit, and BOM levels.

---

**Use for Shipments**                      Indicates whether the substitute item is valid for picking for sales orders and material stock requests.

**Use for Manufacturing**                      Indicates whether the substitute item can be used for substitutions on BOMs or production picking plans.

**Use for Procurement**                      Indicates whether the substitute item can be used for substitutions during online sourcing in PeopleSoft Purchasing. This value is not copied to the business unit because PeopleSoft Purchasing uses only the substitution definition from the setID level.

## See Also

[Chapter 4, “Defining Items by SetID,” Substituting Items, page 91](#)

*PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Understanding PeopleSoft Manufacturing,” Item Substitution

*PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, “Using Purchase Order Sourcing,” Pages Used to Manually Select Requisitions for Sourcing

## Viewing an Item's Substitution Definition at the Business Unit Level

Access the Substitute Items page.

**Substitute Items**

**Unit:** US008  
**Item ID:** GR8000  
 Gear, Sugishita

**Std UOM:** EA

|                          | Priority | Sub Item | Description   | Conversion Rate | Std UOM |
|--------------------------|----------|----------|---------------|-----------------|---------|
| <input type="checkbox"/> | 1        | GR8001   | Gear, Campani | 1.00000000      | EA      |

Substitute Items page (business unit)

Click the Return button to close the page without selecting a substitution.

Select the check box on the row of a substitute item if you want to populate the Item ID field on the previous page with the substitute item's item ID.

**Note.** The Substitute Items link is not available for a vendor return-request type on the Express Issue page. Substitutions are not permitted for vendor returns.

For each substitution option, the system displays this information:

**Conversion Rate** Specifies the factor to convert the transaction quantity to the item's standard UOM.

**Note.** The conversion rate can be different at the setID, business unit, and BOM levels.

## Enabling Item Substitutions for an Order Line

For eligible order lines, item substitutions can be made during order fulfillment and recorded on the Picking Feedback page. An order line is eligible for item substitution only if these conditions are met:

- The Allow Item Substitutes option for the order line is selected.

You can make substitutions only at the time of picking for order lines that permit substitution. To enable substitutions on a sales order, select the Allow Item Substitutes option on the Sold-To Data page, which is used as a default in sales orders in PeopleSoft Order Management. You can change this setting until a substitution is recorded for the order line on the Picking Feedback page or until the order line is shipped. After the order line is added to a pick batch ID and before the order line is shipped, you must duplicate any changes that you made to the Allow Item Substitutes setting on the sales order pages on the Maintain Stock Request page in PeopleSoft Inventory. Changes that are made to order line attributes in PeopleSoft Order Management after the order line appears on a pick plan are not replicated automatically.

For stock requests that are created by using the Material Stock Request component, the Express Issue pages, or the PO Sourcing process, the Allow Item Substitutes setting appears by default from the Fulfillment Item Setup page, if defined, or the Fulfillment Setup page. The Allow Item Substitutes setting on stock requests that is created by the Par Location Replenishment process (INPGCDMD) and through planning messages has a default of disabled—substitutions are not allowed. You can override the Allow Item Substitutes setting for all non-sales order stock requests on the Create/Update Stock Request page until the order line is shipped.

- The order line does not represent a return-to-vendor transaction, a backorder, a configured item, or a component of a kit.

Even for order lines that allow substitutions, substitutions are not permitted during picking for order lines representing configured items, items that are components of kits, and return-to-vendor transactions. In addition, you cannot make substitutions for any order lines for which backorders have been created by the Reserve Materials process (IPLDMND) or as a result of short shipments.

- A valid substitution definition is in effect at the business unit for the requested item on the order line.

An item substitution must be defined at the business unit level for the item on the order line. The picking plan that includes the order line must be generated between the start and end date that is defined for the substitute item that you select to fulfill the order line. Additionally, the substitute item must be valid for shipments; the Use for Shipments option must be selected on the item substitution definition.

- The full quantity on the order line is substituted.

On the Picking Feedback page, you must report picking enough quantity of the substitute item to completely fulfill the order line. You cannot partially fulfill an order line by using the requested item and complete the order by using a substitute item. The picked quantity must equal the requested quantity.

- The order line that is lot allocated is de-allocated prior to substitution.

Before you can record a substitution on the Picking Feedback page for an order line that is lot-allocated, you must first deallocate the lot. You can deallocate the lot from the sales order pages in PeopleSoft Order Management or from the Lot Allocation page in PeopleSoft Inventory.

- The order line that is associated with a shipping container or shipping serial ID is dissociated prior to substitution.

Before you can record a substitution on the Picking Feedback page for an order line that is assigned to a shipping container or shipping serial ID, you must dissociate the order line from the shipping container or shipping serial ID. In bar code environments, you can do this on the Ship Containers/Serials page using transaction 0624 or 0625 for shipping containers and transaction 0632 or 0633 for shipping serial IDs.

You can also dissociate an order line from a shipping container by using the Packing Session component. Likewise, you can dissociate an order line from a shipping serial ID by deleting all shipping serial IDs for the order line on the Shipping/Issues - Ship Serial page.

## See Also

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Changing, Canceling, and Holding Orders,” Understanding Changing Orders

## Using Item Substitutions During Picking

For order lines that allow substitutions, you can enable the picking staff to make substitution decisions when an order is physically picked from inventory storage locations. You can generate pick plans that include substitution options for each order line that permits substitutions whenever the original item is in short supply. Even if the original item is available at the time of picking, the person who is picking the order can choose to pick any of the item’s predefined substitute items and record the substitution on the Picking Feedback page. With this method of substitution, you can complete fulfillment of orders that would otherwise be delayed or backordered.

If you choose to print substitutes, the Picking Plan process (INS6000) validates that each order line allows substitutions. If the Allow Item Substitute option is selected for the order line and not enough of the originally requested item is available to fulfill the order, the picking plan lists, in priority order, all of the valid substitute items that can be used to fulfill the order line. For each order line, substitute items are printed on the pick plan only if these conditions are met:

- The order line permits substitutions—that is, the Allow Item Substitutes option is selected.
- A substitution definition for the requested item is in effect for the item at the business unit level—that is, the date that the Picking Plan process is run is between the start and end dates that are specified on the item substitution definition.
- The order line does not represent a return-to-vendor transaction or a backorder.
- The item that is on the order line is not a configured item or a component of a kit.

- The item substitution definition specifies that the substitution is valid for shipments—that is, the Use for Shipments option is selected for the item substitution definition.
- Insufficient quantity of the originally requested item is available to fulfill the order line.
- Sufficient quantity of the substitute item is available to completely fulfill the order line.
- The order line is not lot allocated.
- The order line is not associated with a shipping container or shipping serial ID.

Printing substitutions on the picking plan are not required for making substitutions during order fulfillment. The Picking Plan process does not actually make any substitutions; it lists valid substitution options for each order line. Even if the original item is unavailable, the Picking Plan process assigns the order line to the pick batch ID without allocating the stock in the storage location—a method that is functionally similar to creating a pull picking plan. This design enables you to select a substitute item on the Picking Feedback page without having to add an order line manually to the pick batch ID. Substitutions are made on the Picking Feedback page when you record the substitute item that you chose to replace the originally requested item.

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

To use an item substitution during picking:

1. Select the Allow Item Substitutes option for the order line.

For sales orders, select the Allow Item Substitutes option on the Sales Order pages in PeopleSoft Order Management. For stock requests that are created by using the Create/Update Stock Request pages, the Express Issue page, or the PO Sourcing process, the Allow Item Substitutes setting will be supplied by default from the Fulfillment Item Setup Page, if defined, or the Setup Fulfillment - Fulfillment Setup page. The Allow Item Substitutes setting on stock requests that is created by the Par Location Replenishment process (INPGCDMD) and through planning messages has a default setting of disabled—substitutions are not allowed. You can override the Allow Item Substitutes setting for all stock requests that are not sales orders on the Create/Update Stock Request page until the order line is shipped.

2. (Optional) Print substitution options on the picking plan.

To list item substitutes for order lines on the picking plan, select the Print Substitutes option on the Additional Options page, accessed from the Picking Plan report page. When you select this option, the picking plan lists the valid substitute items for each order line, plus the available quantity and storage location information (including lot and serial ID).

Printing substitute items on the pick plan is not a requirement for making an item substitution during fulfillment. For order lines that allow substitutions, you can record picking a valid substitute item for the order line on the Picking Feedback page without printing substitutes on the picking plan.

3. Pick a valid substitute item, if needed.

If a substitution is required for an item on the pick plan, you can physically pick one of the valid substitutes that are defined for the item. You must pick enough quantity of the substitute item to completely fulfill the requested quantity on the order line.

4. Record the substitution on the Picking Feedback page.

If you make an item substitution during picking, you must record the substitution on the Picking Feedback page. From the Picking Feedback page, you can access the Select Substitute Item page, where you can select the substitute item that you picked in place of the originally requested item. The quantity picked that you record must equal the quantity that is requested on the order line.

## See Also

[Chapter 2, “Working with Items,” Enabling Item Substitutions for an Order Line, page 18](#)

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## Using Universal Item Identifiers

To define universal item identifiers, universal item ID types, and manufacturers, use the Universal Item Identifier (ITM\_MFG\_UPN), Universal Item ID Type Code (UPN\_TYPE\_CD), and Manufacturer (MANUFACTURER) components. Use the ITM\_MFG\_UPN\_CI and the IN\_EIP\_ITEM\_MFG\_CI component interfaces to load data into the tables for this component.

This section lists common elements and discusses how to:

- Define universal item ID types.
- Designate manufacturer default type codes.
- Designate preferred manufacturers.
- Define universal item identifiers.

The universal item ID feature enables you to maintain and store Universal Product Numbers (UPN), Global Trade Item Numbers (GTIN), Global Location Numbers (GLN), and other industry item identifiers on the PeopleSoft system.

For example, GTIN and GLN data can be registered with the Uniform Council Code (UCC). GTIN and GLN data is maintained in a global registry that is supported by the UCCNet. The UCCNet support feature enables you to publish data to the global registry by going through a non-PeopleSoft partner, which makes the data available to the customer.

To use universal item identifiers, complete these steps:

- Define universal item ID types on the Universal Item ID Type Code page, and indicate whether it represents a GTIN.
- Assign a default universal item ID on the Manufacturers page, and indicate whether the manufacturer is locally owned.
- Designate a preferred manufacturer for each item that needs a universal item identifier on the Manufacturers Item page.
- Define universal item identifiers for the setID-item ID-manufacturer-UOM combination on the Universal Item Identifiers page.
- Alternatively, you may enter a locally owned GTIN for the item-UOM combination on the Assigning a UOM to an Item page.
- Associate a GLN with a customer on the Additional General Information page.
- Designate vendors that are ready to use UPNs on the Vendor Information - Additional Procurement Options page.

## See Also

Chapter 2, “Working with Items,” Using Universal Item Identifiers, page 21

*PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, “Maintaining General Customer Information,” Entering Optional Customer Data

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

## Common Elements Used in This Section

|                          |                                                                                                                                                                       |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>GLN</b>               | An identifying code that represents a business entity or manufacturer.                                                                                                |
| <b>GTIN</b>              | A 14-digit code that encapsulates a 13-digit European Article Number (EAN) and a 12-digit universal product code (UPC-12).                                            |
| <b>UPN</b>               | The identifier (field name <code>UPN_ID</code> ) that is assigned to a unique combination of <code>setid</code> , identifier type, manufacturer ID, item ID, and UOM. |
| <b>Universal Item ID</b> | Distinguishes among different item standards, such as UPN, HI, UCC/EAN, and GTIN.                                                                                     |

## Pages Used to Set Up Universal Item Identifiers

| Page Name                  | Object Name  | Navigation                                                                                                                                                                                                             | Usage                                                                                                                                                                                                                                |
|----------------------------|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Universal Item ID Types    | UPN_TYPE_CD  | Items, Define Controls, Universal Item ID Types                                                                                                                                                                        | Define universal item ID types at the setID level, and determine whether the ID represents a GTIN.                                                                                                                                   |
| Manufacturer               | MANUFACTURER | Items, Define Controls, Manufacturers<br><br>Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Manufacturer                                                                            | Designate manufacture default type codes by selecting a default universal item ID for a manufacturer, and determine whether the manufacturer is locally owned. A manufacturer ID may be used to represent an EAN.UCC company prefix. |
| Manufacturer's Item        | ITM_MFG_SP   | Items, Define Items and Attributes, Define Item, General: Common<br><br>Select the Manufacturer link.                                                                                                                  | Designate preferred manufacturers by defining information about the item's manufacturer and access the Universal Item Identifiers page and the Item Manufacturer GPO page.                                                           |
| Universal Item Identifiers | ITM_MFG_UPN  | Items, Define Items and Attributes, Universal Item Identifiers<br><br>Items, Define Items and Attributes, Define Item, General: Common. Select the Manufacturer link, then select the Universal Item Identifiers link. | Define universal item identifiers by assigning them by item ID, manufacturer ID, and UOM.<br><br>Before you can access this page, you must select and save a preferred (default) manufacturer on the Manufacturer's Item page.       |

## Defining Universal Item ID Types

Access the Universal Item ID Types page.

You must define an identifier type for each setID for which you are using item identifiers. The codes should correspond to the standards of universal item numbers that are used by the customer, or the manufacturers of items that you want to procure.

To define universal item ID types for setIDs:

1. Select a setID for which you want to assign a universal item ID type.
2. Enter a code of four characters or fewer for the identifier type.
3. Click Add.
4. Enter a long description (required) and a short description.
5. Select the Global Trade Item Number check box if the ID type is to be used for GTINs.

If this check box is selected, the ID type will appear as the UPN type code on the Item Default Values page, and will be available on the Universal Item Identifiers page. Only one Universal Item ID Type can have this box selected for each setid.

6. Save the changes.

## Designating Manufacturer Default Type Codes

Access the Manufacturer page.

Use the Manufacturers (IN\_EIP\_ITEM\_MFG\_GBL) component to define manufacturers, designate a universal item identifier-type code as the default for a manufacturer, and indicate whether the manufacturer is locally owned. Use the Manufacturers (IN\_EIP\_ITEM\_MFG\_CI) component interface to load data into the tables for this component.

To designate a universal item identifier type code as the default for a manufacturer and indicate whether the manufacturer is locally owned:

1. Select the universal item ID type for the manufacturer in the Default Universal Item ID field.  
The selection appears on the Universal Item Identifiers page.
2. Select the Locally Owned check box to indicate that the manufacturer is locally owned.  
This selection appears on the Universal Item Identifiers page. More than one manufacturer ID can be locally owned.
3. Save the changes.

## Designating Preferred Manufacturers

Access the Manufacturer's Item page.

You must designate a preferred manufacturer before assigning a universal item identifier to an item ID-manufacturer ID-UOM combination, even if only one manufacturer exists on the Manufacturer's Item page. Each manufacturers' item ID appear by default.

To designate a preferred manufacturer:

1. Select the check box in the appropriate row designating the preferred manufacturer.  
Only one manufacturer can be selected as the preferred manufacturer for the item.
2. Click OK.  
The PeopleSoft system displays the Define Item - General: Common page.
3. Save the changes.

---

**Note.** You should assign only one manufacturer to an item ID if you want to track manufacturers in PeopleSoft Inventory. That is, items that are similar but made by different manufacturers should have separate item IDs.

---

## Defining Universal Item Identifiers

Access the Universal Item Identifiers page.

To define universal item identifiers for an item, use the Universal Item Identifier (IN\_MFG\_UPN\_GBL) component. Use the Universal Item Identifier (IN\_MFG\_UPN\_CI) component interface to load data into the tables for this component.

To define universal item identifiers:

1. Select the Sel (select) check box in the row that is next to the manufacturer for which you want to assign a universal item identifier.
2. Click the Universal Item Identifiers link.  
The PeopleSoft system displays the Universal Item Identifiers page.
3. Select a universal item ID type and a UOM, and enter an identifier.  
The default universal item ID-type code comes from the Manufacturer page.
4. Save the changes.

---

## Using Device Tracking

This section discusses how to:

- Select items for device tracking.
- Receive tracked devices.
- Access tracked device distribution information.

You can use device tracking with PeopleSoft Purchasing to view device tracked items throughout the procurement cycle. You can track both inventory and non-inventory items by selecting them in the item master. At the time of receipt, you can also track items that are ordered by description only.

An item that is designated for device tracking must be lot controlled, serialized, or both. If you select an item for tracking that is neither serialized nor lot controlled, you receive an error message. You can disable device tracking for an item in the item master at any time. The device tracking option appears for users during the procurement process.

You can use device tracking to:

- View and override information that is used to put items into PeopleSoft Inventory storage locations.
- Review tracking information during the procurement process.

Two reports are provided specifically for tracked devices. One displays tracked devices from the item master; the other displays tracked items that are received.

### Reviewing Tracked Item Information

If an item is selected for device tracking, the Device Tracking check box is selected; otherwise, the check box is clear. The Device Tracking check box appears on these pages:

- Line Details (REQ\_LINE\_DETAILS).
- Line Details (PO\_LINE\_DTLS).
- Item Details (CNTRCT\_ITM\_DTL\_SEC, CNTRCT\_RLS\_ITM\_SEC).
- Receiving (RECV\_WPO).
- Request for Quotes (RFQ\_HDR).
- Line Details (REQ\_INQ\_LINE).
- Receipts (RECV\_INQ).

- Request for Quotes (RFQ\_HDR).
- Device Tracking Inquiry (RECV\_INQ\_DEVICE).

---

**Note.** You can select or clear the tracking option only on the Define Item - Inventory: Tracking/Description page.

---

## Displaying Device Tracking Information on Reports

You can produce these reports with device tracking information displayed:

| Document                    | Process Name                           | Usage                                                                                                                                                              |
|-----------------------------|----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Device Tracking Master List | IN Device Tracking Item List (INS9030) | Displays device-tracked items, filtered according to the parameters that are selected.<br><br>See <a href="#">Appendix B, “PeopleSoft Item Reports,”</a> page 169. |
| P/O Receipt Device Tracking | Device Tracking Receipts (PORC930)     | Displays device-tracked items that are received.                                                                                                                   |

## Pages Used for Device Tracking

| Page Name                                    | Object Name      | Navigation                                                                                   | Usage                                                                                                      |
|----------------------------------------------|------------------|----------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| Define Item - Inventory Tracking/Description | INV_ITEMS_DEFIN2 | Items, Define Items and Attributes, Define Item, Inventory                                   | Select an item for device tracking and establish or maintain item descriptions and lot-control attributes. |
| Receiving                                    | RECV_WPO         | Purchasing, Receipts, Add/Update Receipts                                                    | Create receipts for non-PO and PO line items.                                                              |
| Device Tracking                              | RECV_WPO_DEVICE  | Purchasing, Receipts, Add/Update Receipts<br><br>Click the DT Details button in an item row. | Review distribution information for a tracked device and assign serial IDs or lot IDs.                     |

## Selecting Items for Device Tracking

Access the Define Item - Inventory: Tracking/Description page for the item that you want to track.

1. Select the Device Tracking check box.
2. Save the changes.

---

**Note.** You can only select items for tracking that are lot-controlled, serial-controlled, or both.

---

## Receiving Tracked Devices

Access the Receiving page.

|               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Serial</b> | Indicates whether the receipt line is serial controlled. The check box is selected and unavailable for serialized items. If you are receiving a description-only PO line (no item ID) and the Device Track check box is selected, you can select the serial option. (You can also select this check box if the item is ordered using the description only and the line is asset related.) For serial-controlled items, you must enter the serial ID at the time of receipt or putaway or during any inventory movement transaction. |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

---

**Note.** Do not select the Serial check box for items that are only lot-controlled.

---

|                     |                                                                                                                                                                                                                                                                                               |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Device Track</b> | Indicates whether a receipt line is device tracked. The default value is selected and unavailable for device-tracked items unless they are description-only (no item ID). The field is available for items that are description-only. Select to device track items that are description-only. |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

**DT Details** Click to access the Device Tracking page.

## Accessing Tracked Device Distribution Information

Access the Device Tracking page.



Click the Insert Non-Serial Row button to split out the quantities to different lots or putaway locations. This generates another putaway row for the same inventory business unit. You must reduce the earlier putaway quantities for this unit if you split a putaway. The total putaway quantity for this unit must match the total quantity that you accept.



Click the Cancel Row button to cancel the selected row of the distribution line.

### Distribution Information



Click the Assign Serial IDs button to access the Generate Serial Number page, where you can assign serial ID numbers to the selected receipt items. This page is accessible only if the related item is serial-controlled.



Click the Lot ID button to access the Generate Lot Numbers page, where you can assign a lot ID to a lot-controlled item. This page is accessible only if the related item is lot-controlled.

---

**Note.** Do not generate lot IDs for device-tracked items. Instead, enter the vendor-assigned lot ID in the Lot/Batch field or the Vendor Lot field.

---

|                                          |                                                                                                                                                                                                                         |
|------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Sel (select)</b>                      | Select to work with a particular line item.                                                                                                                                                                             |
| <b>Dist Seq (distribution sequence)</b>  | Identifies the putaway row number that is associated with the specific distribution line.                                                                                                                               |
| <b>IN Unit (inventory business unit)</b> | Identifies the inventory business unit for the distribution. For non-PO receipts, this value is supplied by default from the ship-to location. For PO receipts, this value appears by default from the PO distribution. |
| <b>Status</b>                            | The status of the receipt line.                                                                                                                                                                                         |

|                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Serial/Component</b> | Enter a serial ID. This field is available if the Serial Control check box is selected on the Define Item - Inventory: Tracking/Description page, or for items that are ordered by description if the Device Track and Serial check boxes are selected on the Receiving page.                                                                                                                                                                                                                                                                                                                       |
| <b>Lot/Batch</b>        | Enter a lot ID. This field is available if the Lot Control check box is selected on the Define Item - Inventory: Tracking/Description page, or if the Device Track check box is selected for description-only items on the Receiving page. The value that you enter becomes the default for the Vendor Lot field.                                                                                                                                                                                                                                                                                   |
| <b>Vendor Lot</b>       | Enter a vendor-assigned lot ID. This field is available only if the Lot Control check box is selected on the Define Item - Inventory: Tracking/Description page.                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Expire Dte</b>       | Enter the expiration date for the lot ID. This field is left blank if the item is a non-inventory receipt line (subcontract, expense only, or an asset-only interface receipt). The date here is unavailable for change if the item's lot ID is assigned an expiration date. If the item's lot ID does not have an assigned expiration date, the item's shelf life value (if greater than zero) is added to the receipt date to calculate the expiration date. This expiration date value is available for override. If no shelf life value is entered for the item, you are required to enter one. |

---

## Defining Custom Item Attributes

To capture item attributes that are specific to the business, the PeopleSoft system provides generic numeric and alphanumeric item attribute fields at both the setID and business unit level. By using PeopleSoft Application Designer, you can modify the field labels to represent their functions in the system.

As with other item attributes, custom attributes that you enter at the setID level automatically change to the business unit, where they can be modified. Custom attributes are updated by the Item Loader processes and you can copy them by using the Item Copy page. Custom item attributes are included on the Basic Item Listing Report and in the Item Master outbound EIPs (enterprise integration point). You can add these fields to existing reports or to custom reports.

For the set ID, define custom item attributes on the Define Item - Custom: Character page and the Define Item - Custom: Numeric page. The values that you define automatically change to the business unit level. You can modify these attributes on the Define Business Unit Item - Custom: Character page and Define Business Unit Item - Custom: Numeric page.

### See Also

*Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Designer*

---

## Using Item Quantity UOM

All PeopleSoft applications use UOM to quantify resources. In PeopleSoft Inventory, UOMs enable you to quantify and track inventory items. Suppose that you stock items in boxes of 12 and in cases of 60, the boxes and the cases are prepackaged, and you do not enable the warehouse personnel to break the packaging. You can stock item quantities in both these units of measure and track them as they move through the warehouse.

You can use different UOMs to conduct different types of transactions. For example, you might order an item by the case but store it in the warehouse and ship it to customers either by the box or as individual entities. You can track all of these transactions in the system by setting up quantity units of measure for ordering, stocking, and shipping, in addition to the required standard UOM. To facilitate processing, the PeopleSoft system maintains conversion rates between the standard UOM and the various other UOMs.

## Standard UOM

The standard UOM represents the most common UOM for an item and should be the item's smallest valid unit of measure. The standard UOM must be valid for ordering, stocking, and shipping. Because PeopleSoft Inventory maintains item quantity on hand and costs in the standard UOM and uses this unit in quantity-on-hand and costing calculations, you cannot change the standard UOM after you perform transactions involving the item.

When you define an item's standard UOM on the Define Item - General: Common page, PeopleSoft Inventory automatically assigns a conversion rate of 1.000 for stocking, shipping, and ordering transactions. While you can modify conversion rates for the other UOMs that are defined for the item, you cannot override this base conversion rate.

## Standard Pack Unit of Measure

Define a standard pack UOM if you consistently stock or ship items in packages of a specific size and type. For example, if you always ship pens in boxes of 12, you can define a box as having 12 each (the standard UOM), and then define the standard pack UOM as a box. You define the standard pack UOM on the Define Business Unit Item - Inventory: Shipping/Handling page.

PeopleSoft Inventory uses the standard pack UOM to determine how many labels to generate when printing shipping-carton and production-completion labels. Suppose that you are shipping 10 boxes of the pens and you want to print one label per box. If you use the standard UOM (eaches), the label process prints 120 labels (one per pen); if you use the standard pack UOM (boxes), the process prints 10 labels (one per box).

## Stocking UOM

The stocking UOM describes how you store quantities of an item in the warehouse. You can use the stocking UOM for a variety of transactions, including putaway, transfers, container management, adjustments, picking, and ordering.

When you assign UOMs to an item on the Units of Measure page, indicate whether each UOM is valid for ordering, shipping, or stocking transactions. If more than one UOM is valid for stocking, specify which of these should be the default stocking UOM. The PeopleSoft system automatically selects the standard UOM as the default stocking UOM, but you can change this value to any valid stocking UOM. The one exception is serial-controlled items, for which the only valid stocking UOM is the standard UOM. Each item can have only one default stocking UOM.

The Purchasing Receiving pages, the InterUnit and RMA Receiving pages, the Manual Staging page, and the Express Putaway page automatically use an item's default stocking UOM, but you can override the default and enter any valid stocking UOM for the item.

---

**Note.** Manufacturing Completions processes put stock away into PeopleSoft Inventory in the standard UOM only.

---

You can maintain multiple stocking UOMs for an item, but because you must identify the UOM for every transaction using the item, doing so requires that you track each UOM physically. To simplify warehouse operations, store the item in one UOM.

For example, suppose that Item A has a standard UOM of each (EA) and two stocking UOMs: each and case (CS). Assume that one CS equals 12 EA. To transfer all of Item A from one storage location to another, create two transactions—one to transfer the quantity that is stocked in EA and the second to transfer the quantity that is stocked in CS. If the picking plan calls for two cases of Item A to be picked, and you have 12 EA and one CS, create two picking feedback transactions—one to pick 12 EA and the second to pick one CS.

If, however, you define one stocking UOM for Item A, create only a single transaction for either of these material movements. You can still have an ordering UOM of CS, allowing you to order two CS. The difference is that you can enter a single picking feedback transaction by using the ordering UOM of CS. The system automatically converts to the single stocking UOM to find the correct quantity to fill the picking request.

## Ordering UOM

Define an ordering UOM if you order quantities in a UOM that is other than the standard UOM. You can use the ordering UOM to create material stock requests, sales orders, and purchasing requisitions.

You cannot change the ordering UOM for an item if an open order containing the item exists in PeopleSoft Inventory.

## Shipping UOM

Define a shipping UOM if you ship quantities in a UOM that is other than the standard UOM. Use the shipping UOM on the Packing Session pages and on the Shipping/Issues component.

You cannot change the shipping UOM for an item if an open order containing the item exists in PeopleSoft Inventory.

## Rules for Deleting UOMs

Whenever you attempt to delete a UOM on the Units of Measure page in the Set Up Financials/Supply Chain - Common Definitions menu, PeopleSoft Inventory checks for these situations. If any of the conditions are not met, the system issues an error message and cancels the deletion.

- All UOMs: No item uses this UOM as a default stocking UOM.
- Stocking UOM: No quantity on hand or negative quantity exists in any storage location (the `PHYSICAL_INV` table) and no quantity exists in the putaway staging tables (`STAGED_INF_INV` and `STAGED_ITEM_INV`).
- Ordering UOM: No data exists in the ordering tables (`DEMAND_INF_INV` and `DEMAND_INV`) and no undepleted data exists in the Shipping Interface table (`SHIP_INF_INV`).
- Shipping UOM: No undepleted data exists in the Shipping Interface table (`SHIP_INF_INV`).

## Using Units of Measure

This table illustrates which units of measure are used by PeopleSoft Inventory transaction pages.

| Page                    | Valid Unit of Measure |
|-------------------------|-----------------------|
| Material Stock Request. | Ordering              |
| Picking Feedback.       | Stocking              |
| Shipping/Issues.        | Shipping              |

| Page                         | Valid Unit of Measure |
|------------------------------|-----------------------|
| InterUnit and RMA Receiving. | Stocking              |
| Express Putaway.             | Stocking              |
| Stockroom Feedback.          | Stocking              |
| Adjustments.                 | Stocking              |
| Transfers.                   | Stocking              |
| Container Management.        | Stocking              |
| Packing.                     | Shipping              |
| Physical Accounting.         | Stocking              |

## Using UOMs with Electronic Data Collection Systems

The UOM Conversion Flag (unit of measure conversion flag), available on the Installation Options - Inventory page, the Inventory Options page, and the Define Item - Inventory: Shipping/Handling page, enables you to indicate how the electronic data collection system should handle UOMs. The option that you select on Installation Options page is used as the default option at the setID level and can be overridden on Inventory Options; the selection that you make on Inventory Options is used as the default option at the business unit level and can be overridden on the Define Business Unit Item - Inventory: Shipping/Handling page. The electronic data collection transactions that run in the background use the settings on this final page.

You can set the conversion flag to process transactions in one of three ways:

- If you select *Convert to Standard UOM* (convert to the standard unit of measure), the system converts the UOM on incoming transactions to the item's standard UOM.  
This enables you to stock all of the inventory in the standard UOM and perform material movement transactions by using any valid UOM for the item.
- If you select *Convert to Default Stock UOM* (convert to the default stocking unit of measure), the system converts the UOM on incoming transactions to the default stocking UOM.
- If you select *Use Entered UOM*, the system processes transactions by using whatever UOM the user enters.

These transactions do not use the conversion flag in the standard manner:

- The shipping container and shipping serial transactions accept only the shipping UOM.  
After verifying that the entered UOM is valid for shipping, the system processes the transaction by using that UOM.
- The interunit and purchase order receiving transactions use a receiving UOM rather than a putaway UOM and therefore accept any valid UOM for the item.

For these transactions, the system receives the item in the entered UOM, then stocks it in the default stocking UOM.

- Both the PeopleSoft Inventory and the Production Management picking feedback transactions take the original stocking UOM into account.

If the original stocking UOM is identified on the incoming transaction, the system automatically converts the picking UOM to the original stocking UOM; if the original stocking UOM is not identified, the system selects the conversion flag and uses it accordingly.

- The shipping notification transaction both picks and ships stock.

When picking, the system selects the conversion flag to determine which UOM to use; when shipping, it uses only the ordering UOM.

This table shows which UOMs are valid for each transaction type and each setting of the conversion flag.

| <b>Transaction</b>        | <b>Use the Entered UOM</b>  | <b>Convert to the Standard UOM</b> | <b>Convert to Default Stocking UOM</b> |
|---------------------------|-----------------------------|------------------------------------|----------------------------------------|
| Picking.                  | Stocking.                   | Any valid UOM for the item.        | Any valid UOM for the item.            |
| Shipping Containers.      | Shipping.                   | Shipping.                          | Shipping.                              |
| Putaway.                  | Stocking.                   | Any valid UOM for the item.        | Any valid UOM for the item.            |
| Transfers.                | Stocking.                   | Any valid UOM for the item.        | Any valid UOM for the item.            |
| Adjustments.              | Stocking.                   | Any valid UOM for the item.        | Any valid UOM for the item.            |
| Interunit Receipts.       | Any valid UOM for the item. | Any valid UOM for the item.        | Any valid UOM for the item.            |
| Shipping Notification.    | Stocking.                   | Any valid UOM for the item.        | Any valid UOM for the item.            |
| Purchase Order Receiving. | Any valid UOM for the item. | Any valid UOM for the item.        | Any valid UOM for the item.            |
| Kit Issues>Returns.       | Standard.                   | Any valid UOM for the item.        | Any valid UOM for the item.            |

| Transaction         | Use the Entered UOM | Convert to the Standard UOM | Convert to Default Stocking UOM |
|---------------------|---------------------|-----------------------------|---------------------------------|
| Completions.        | Standard.           | Any valid UOM for the item. | Any valid UOM for the item.     |
| Production Picking. | Stocking.           | Any valid UOM for the item. | Any valid UOM for the item.     |

### Examples: How to Use UOMs

These examples illustrate the concepts that are discussed in Understanding Item Unit of Measure. These examples do not encompass all possibilities for each transaction; they are designed to display how the different UOMs for an item can be used in PeopleSoft Inventory.

### Using a Single Stocking UOM with Multiple Ordering and Shipping UOMs

For this example, assume that item MOD900 (a modem) has these UOMs and conversion rates:

| UOM         | Standard UOM | Vendor UOM | Stocking UOM | Ordering UOM | Shipping UOM |
|-------------|--------------|------------|--------------|--------------|--------------|
| Each (EA)   | 1 EA         |            | 1 EA         |              | 1 EA         |
| Case (CS)   |              | 100 EA     |              | 25 EA        | 25 EA        |
| Pallet (PL) |              |            |              |              | 100 EA       |

### Receiving Transaction

You receive 10 CS of MOD900 using the vendor UOM of CS. This is different from the shipping UOM of CS: the vendor UOM of CS is 100 EA and the shipping UOM of CS is 25 EA.

### Putaway Transaction

You put away 1,000 EA of MOD900 in Bin A using the standard UOM, the only valid stocking UOM for this item.

If you use an electronic data collection system, and you have selected the UOM Conversion Flag to convert the entered UOM to the standard UOM, you can also put away 40 CS or 10 PL. In either case, the system converts this quantity to the standard UOM of EA.

### Transfer Transaction

You then transfer 50 EA of MOD900 from Bin A to Bin C using the stocking UOM.

If you use an electronic data collection system, and you select the UOM Conversion Flag to convert the entered UOM to the standard UOM, you can also transfer 2 CS or 0.5 PL from Bin A to Bin C. In either case, the system converts the quantity to the standard UOM of EA.

## Material Stock Request Transaction

You enter a customer sales order for 8 CS of MOD900. You can also enter the quantity in the standard UOM (200 EA)—the system automatically converts this quantity to the ordering UOM (CS, in this example).

## Picking Transaction

You pick 8 CS of MOD900 from Bin A. The Picking Feedback transaction automatically converts the 8 CS to a quantity of 200 EA. You can pick using the stocking, ordering, or standard UOM.

If you use an electronic data collection system and you have selected the UOM Conversion Flag to convert the entered UOM to the standard UOM, you can also pick in CS and the system automatically converts the quantity to EA.

## Shipping/Issues Transaction

You ship 8 CS of MOD900 to the customer. You can also choose to ship 2 PL.

If you use the shipping containers electronic data transaction, you can ship in EA, CS, or PL, as these are all valid shipping UOMs for the item.

## Using Multiple Stocking UOMs

For this example, assume that item COT100 (a cotton ball) has these UOMs and conversion rates:

| Unit of Measure | Standard UOM | Stocking UOM |
|-----------------|--------------|--------------|
| Each (EA)       | 1 EA         | 1 EA         |
| Box (BX)        |              | 100 EA       |
| Case (CS)       |              | 550 EA       |

In the hospital supply room, you issue cotton balls by the box of 100 cotton balls and by the case of 550 cotton balls. Boxes are issued to nurses' stations and cases are issued to departments.

The cotton balls are stocked separately in boxes of 100 or in cases of 550. You receive a shipment of cotton balls and put away 5 BX and 10 CS.

Someone comes to the supply room and requests 5 BX of cotton balls for the nurse's station in the department. When you issue the 5 BX, you are left with no boxes and 10 cases of COT100.

Someone else requests 2 boxes of COT100; you tell them you are out until the next shipment. You would not issue 100 EA out of a CS because you do not want to break the case.

Another department requests 3 cases of cotton balls. When you give them the 3 CS, you are left with no BX and 7 CS.

## Associating Items with UOMs

You set up relationships between items and UOMs at both the setID level and the business unit level.

To associate items with UOMs:

1. Establish UOMs for the setID.

Define UOMs on the Units of Measure page, which you access from the Set Up Financials/Supply Chain - Common Definitions menu. All UOMs must be defined here before they are available anywhere else in the system.

2. Define the standard UOM for each item within the setID.

Using the Define Item - General: Common page, assign each item a standard UOM that reflects the item's most common UOM.

---

**Warning!** To minimize rounding discrepancies when using multiple UOMs, use the smallest valid unit of measure for the item as the standard UOM.

---

3. Define additional UOMs for each item within the setID.

Using the Units of Measure page, which you access from the Define Items menu, define valid UOMs for ordering, stocking, and shipping each item. As part of this definition, identify the default stocking UOM, specify conversion rates between the standard UOM and the additional UOMs, and set up quantity precision rules for use in system calculations.

For each UOM, define corresponding stocking and shipping parameters on the UOM Weight/Volume page. To access this page, click the UOM Weight/Volume link on the Units of Measure page, which you access from the Define Items menu.

4. Define any UOM attributes that vary according to business unit.

Define a standard pack UOM on the Define Item - Inventory: Shipping/Handling page. This is the only UOM that you define at the business unit level rather than at the setID level.

If stocking, ordering, and shipping UOMs and their corresponding stocking and shipping parameters differ according to the business unit, define this information on the Define Business Unit Item - Inventory: Weight/Volume page.

### See Also

[Chapter 2, "Working with Items," Establishing Quantity Precision and Rounding Rules for Items, page 35](#)

---

## Establishing Quantity Precision and Rounding Rules for Items

This section provides a overview of rules used when rounding and rounding exceptions and discusses how to set up quantity precision and rounding rules.

### Understanding Rules used when Rounding

This section discusses:

- Quantity Precision Rules.
- Rounding Rules.
- Automatic UOM Rounding.

## Quantity Precision

Quantity precision rules enable you to indicate whether entered and calculated quantities for an item-UOM combination should be expressed as whole numbers or decimals. If you specify a whole number as the quantity precision, all quantities involving the item-UOM combination are stored in the database and appear on pages and reports as whole numbers. Zeros still appear in the decimal places, however, so that you see *5.0000* rather than *5*. If you specify a decimal quantity precision, quantities are stored and appear as decimals that are carried out to four places.

Quantity precision is set at the inventory setID and item-UOM levels and is defined on the Units of Measure page, which you access from the Define Items menu.

Whenever you enter a quantity for an item-UOM combination, the PeopleSoft system verifies whether the entry conforms to the quantity precision rules that you specify. If you enter a decimal value for a combination requiring whole numbers, an error message appears. For example, if the EA UOM is defined for whole numbers, you cannot enter a quantity of 1.5 EA.

You can always change a whole number precision to a decimal precision, but you cannot always change a decimal precision to a whole number precision. After you complete certain transactions involving the item—any putaway operation, any order placed against the item, or any adjustment—you cannot make this change.

See [Chapter 2, “Working with Items,” Setting Up Quantity Precision and Rounding Rules, page 38](#).

## Rounding Rules

Whenever you define a whole number as the quantity precision on the Unit of Measure page, you associate a rounding rule with that item-UOM combination. Rounding rules enable you to determine the direction in which fractional quantities are rounded so that calculations involving the item result in whole numbers. You have two options:

- Natural round

Fractional values that are greater than or equal to 0.5 are rounded up to the nearest integer, and fractional values that are less than 0.5 are rounded down to the nearest integer.

- Round up

Fractional values are rounded up to the nearest integer.

To change the rounding rules for an item at any time, return to the Unit of Measure page and select a different option.

---

**Note.** Calculations that are performed by using the natural round option can produce rounded quantities of 0. For example, the calculated quantity 0.2500 rounds down to 0 rather than up to 1. When establishing the rounding rules, select the round up option to ensure that the system never rounds to 0.

---

See [Chapter 2, “Working with Items,” Understanding Rounding Exceptions, page 37](#).

## Automatic UOM Rounding

The Automatic UOM Round option on the Business Unit Related - Inventory Definition page enables you to indicate whether entered fractional quantities should be rounded automatically during UOM conversions. Whenever a PeopleSoft application performs a UOM conversion, it uses the specified rounding rule in conjunction with the automatic rounding option that you select here to determine how to process these quantities.

Depending on how you set the automatic rounding flag, the PeopleSoft system handles automatic rounding in one of three ways:

- Generates a warning message.

The system suggests a new quantity to replace the entered quantity. If you accept the suggested value, processing continues; if you reject it, the system displays an error message and stops processing the transaction.

---

**Note.** Because batch processes do not produce online messages, the system treats this option differently when running in batch: it creates a hard-error warning and stops conversion processing.

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- Generates an error message.

The system displays an error message and stops conversion processing. You must enter a different quantity before processing can resume.

- Performs automatic rounding without generating a message.

The system automatically replaces the entered quantity with the new value.

---

**Note.** A UOM conversion that necessitates changing a quantity that is already stored in the database always results in an error, no matter which automatic rounding option you select.

---

This example illustrates the principles that are behind automatic rounding. Suppose that you maintain item A in two different UOMs: the standard UOM is each (EA) and the stocking UOM is cases (CS). Assume that cases can exist in fractional quantities but EA must be whole numbers, you have selected the natural round rule, and the conversion factor is 6 EA to 1 CS. Suppose that you enter an order for 0.3331 CS of the item. Because PeopleSoft Inventory conducts transactions in the standard UOM, the request for 0.3331 CS is converted to 2 EA (rounded according to the rules that you specify). To maintain data integrity within the system, the originally entered quantity must be revalidated. When the rounded quantity of eaches is reconverted to cases, the resulting value requires the original quantity to be changed from 0.3331 CS to 0.3333 CS.

## Understanding Rounding Exceptions

Certain situations exist in both PeopleSoft Purchasing and PeopleSoft Manufacturing in which rounding differs from the standard functionality.

### PeopleSoft Purchasing

If the installation includes PeopleSoft Purchasing, you can override the defined quantity precision rules on the Vendor's UOM & Pricing Info page.

If you specify a whole number quantity precision, the Build Inv Demand from Stage (build inventory demand from stage) process (PO\_REQINVS) automatically rounds to whole numbers after calculating the transfer yield (defined on the Define Business Unit Item - Planning: Order Modifiers page). If a rounding error occurs, the process stops the creation of inventory demand and creates a purchase order instead.

During purchase order sourcing, the system applies to the largest distribution any differences that are from rounding. Rounding differences are usually small enough that updating the source documents (requisitions and planned purchase orders, for example) to reflect these discrepancies is not necessary.

### PeopleSoft Manufacturing

PeopleSoft Manufacturing does not use the standard rounding rules in three types of transactions:

- Quantity per assembly.

- Cost Rollup process.
- Component demand.

### See Also

*PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, “Using Purchase Order Sourcing,” Building Inventory Demand Transactions

*PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, “Using Purchase Order Sourcing,” Understanding the Purchase Order Sourcing Business Process

*PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Understanding PeopleSoft Manufacturing,” Rounding Rules in Manufacturing

## Setting Up Quantity Precision and Rounding Rules

When you establish items and UOMs for the business, define quantity precision and rounding rules for use in system transactions and calculations. These rules govern the manner in which PeopleSoft applications process entered and calculated quantities.

To set up quantity precision and rounding rules:

1. Define quantity precision and rounding rules for the setID.

On the Units of Measure page, which you access from the Define Items menu, specify whether quantities for each item-UOM combination should be expressed as whole numbers or as decimals.

If you specify a whole-number quantity precision, select a rounding rule (either round up or natural round) to indicate how calculated quantities should be rounded so that they result in whole numbers.

2. Define automatic rounding rules for UOM conversions.

On the Business Unit Related - Inventory Definition page, select an automatic rounding option to indicate whether the system should generate warning messages, generate error messages, or round quantities automatically during UOM conversions.

### See Also

Chapter 2, “Working with Items,” Establishing Quantity Precision and Rounding Rules for Items, page 35

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## Viewing Item Information

This section describes how to view item information.

### Pages Used to View Item information

| Page Name                  | Object Name       | Navigation                                       | Usage                                                                                                  |
|----------------------------|-------------------|--------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| Item Brand Names (inquiry) | BRND_NAME_INQ_INV | Items, Review Item Information, Item Brand Names | View brand names that are associated with an item and the periods for which the brand names are valid. |

| Page Name                                         | Object Name      | Navigation                                                                                                                 | Usage                                                                                                |
|---------------------------------------------------|------------------|----------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|
| Items - General: Common (inquiry)                 | NV_ITEMS_DEFIN1  | Items, Review Item Information, Items, General<br><br>Items, Define Items and Attributes, Define Item, General             | View the item attributes that are defined on the Define Item - General: Common page.                 |
| Items - General: Classifications                  | INV_ITEMS_DEFIN4 | Items, Review Item Information, Items, General<br><br>Items, Define Items and Attributes, Define Item, General             | View the item attributes that are defined on the Define Item - General: Classifications page.        |
| Items - General: Dimensions (inquiry)             | INV_ITEMS_DEFIN3 | Items, Review Item Information, Items, General<br><br>Items, Define Items and Attributes, Define Item, General             | View the item attributes that are defined on the Define Item - General: Dimensions page.             |
| Items - General: Usage (inquiry)                  | INV_ITEMS_DEFIN8 | Items, Review Item Information, Items, General<br><br>Items, Define Items and Attributes, Define Item, General             | View the item attributes that are defined on the Define Item - General: Usage page.                  |
| Items - Inventory: Tracking/Description (inquiry) | INV_ITEMS_DEFIN2 | Items, Review Item Information, Items, Inventory<br><br>Items, Define Items and Attributes, Define Item, Inventory         | View the item attributes that are defined on the Define Item - Inventory: Tracking/Description page. |
| Items - Inventory: Shipping/Handling (inquiry)    | INV_ITEMS_DEFIN5 | Items, Review Item Information, Items, Inventory<br><br>Items, Define Items and Attributes, Define Item, Inventory         | View the item attributes that are defined on the Define Item - Inventory: Shipping/Handling page.    |
| Items - Substitutes (inquiry)                     | INV_ITEMS_DEFIN7 | Items, Review Item Information, Items, Substitutes<br><br>Items, Define Items and Attributes, Define Item, Substitutes     | Use the page to view the item attributes that are defined on the Define Item - Substitutes page.     |
| Items - Configuration (inquiry)                   | INV_ITEMS_DEFIN6 | Items, Review Item Information, Items, Configuration<br><br>Items, Define Items and Attributes, Define Item, Configuration | Use the page to view the item attributes that are defined on the Define Item - Configuration page.   |

| Page Name                           | Object Name         | Navigation                                                                                               | Usage                                                                                                             |
|-------------------------------------|---------------------|----------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| Items - Custom: Character (inquiry) | INV_ITEMS_DEFIN9    | Items, Review Item Information, Items, Custom<br>Items, Define Items and Attributes, Define Item, Custom | View the item attributes that are defined on the Define Item - Custom: Character page.                            |
| Define Item - Custom: Numeric       | INV_ITEMS_DEFIN10   | Items, Review Item Information, Items, Custom<br>Items, Define Items and Attributes, Define Item, Custom | View the item attributes that are defined on the Define Item - Custom: Numeric page.                              |
| Items - Audit (inquiry)             | INV_ITEM_HDR_INQ    | Items, Review Item Information, Items, Audit<br>Items, Define Items and Attributes, Define Item, Audit   | View information about when the item was defined for the setID and when the setID definition was last modified.   |
| Catalog - Catalog Inquiry           | CATALOG_INQUIRY     | Items, Review Item Information, Catalog, Catalog Inquiry                                                 | View item information in the purchasing catalogs.                                                                 |
| Item Category Detail (inquiry)      | ITM_CAT_DETAIL      | Select an item and click the Item Details link on the Catalog - Catalog Inquiry page.                    | View details about a selected item, including availability, standard pricing, and lead time.                      |
| Item Vendor Priority (inquiry)      | ITM_CAT_VNDR        | Click the Item Vendor link on the Catalog - Catalog Inquiry page.                                        | View vendor information such as status and priority.                                                              |
| Substitute Items (inquiry)          | ITM_SUB_PNL         | Click the Substitute Items link on the Catalog - Catalog Inquiry page.                                   | View substitutes that are established for an item.                                                                |
| Default Putaway Locations (inquiry) | DEFAULT_LOC_INQ_INV | Inventory, Maintain Storage Locations, Review Default Putaway Loc                                        | View all of the default putaway locations for items that are defined by using the Default Putaway Locations page. |
| Fixed Picking Locations (inquiry)   | FIXED_LOC_BIN_INQ   | Inventory, Maintain Storage Locations, Review Fixed Picking Locations, Fixed Picking Locations           | View all of the fixed picking locations that are defined for an item by using the Fixed Picking Locations page.   |

## Viewing Item Information

Access the Items - Audit page.

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**Note.** When the item's setID definition record is approved, the fields that are in the Last Item Approval Change group box are not updated. When the item definition is approved, the item status is set to *Active*. This group box does not reflect post-approval status updates such as *Hold*, *Inactive*, or *Discontinue*.

---

|                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Approval Date</b>    | Indicates the date that the status in the Item Status Approval field was implemented (that is, the date that the item's setID definition was set to <i>Under Initialization</i> , <i>Pending Approval</i> , <i>Denied Approval</i> , or <i>Approved</i> ).                                                                                                                                                                                                                                                                                   |
| <b>Approval User ID</b> | Indicates the ID of the user who triggered the status change that is reflected in the Item Status Approval field. For example, for an enterprise that requires manual approval, this field indicates the ID of the person who approved or denied the item definition on the Item Approval page. For an enterprise that automatically approves item definitions, this field indicates the ID of the person who changes the item status from <i>Under Initialization</i> to <i>Pending Approval</i> on the Define Item – General: Common page. |

### See Also

Chapter 2, “Working with Items,” Managing Inventory by Item Status, page 6

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## Using Enterprise Integration Points for Items

This section discusses how to:

- Send outbound data with the Item Master EIP.
- Send item information to PeopleSoft CRM.
- Receive inbound data with the Item Master EIP and the Item Price List EIP.

PeopleSoft applications provide the following enterprise integration points (EIPs)—the Item Price List EIP, the Item Master EIPs, and the CRM Item Sync EIPs—that enable you to synchronize item data with third-party systems. With the Item Price List EIP, you can receive item price list data that is published by third-party sources or load this information from a flat file. With the CRM Item Sync EIPs, you can send item records to PeopleSoft CRM.

### See Also

Chapter 2, “Working with Items,” Sending Item Information to PeopleSoft CRM, page 51

Chapter 6, “Loading Items,” page 129

[http://www.peoplesoft.com/corp/en/products/technology/oif/eip\\_catalog.jsp](http://www.peoplesoft.com/corp/en/products/technology/oif/eip_catalog.jsp)

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

## Sending Outbound Data with the Item Master EIP

With the Item Master EIPs, you can send and receive complete item records.

The Item Master EIP includes four XML-based service operations defined in PeopleSoft Integration Broker: ITEM\_SYNC, ITEM\_SYNC\_EFF, ITEM\_FULLSYNC, and ITEM\_FULLSYNC\_EFF. Activate the ITEM\_SYNC service operation to send incremental updates automatically as item information is updated online or by using the Change Item Status process (INS4000), Item Loader process (IN\_ITMLOAD), or Publish Outbound Message process. Activate the ITEM\_FULLSYNC service operation to perform full data replication by scheduling a batch process using the Full Data Publish utility. This process generates an outbound transaction containing item information.

If you are sending item data to a third-party system that cannot process effective-dated rows, activate the \_EFF version of either the ITEM\_SYNC or ITEM\_FULLSYNC service operations. When you send item updates by using the \_EFF service operations, future-dated segments of the data are removed from the outbound transaction and sent when the effective date equals the current date.

When you activate the ITEM\_SYNC or ITEMSYNC\_EFF service operations, outbound item information is generated from these 11 points within the PeopleSoft system as approved items are being maintained:

1. Define Item component.
2. Purchasing Attributes component.
3. Approve Item component.
4. Purchasing Attributes component.
5. Units of Measure component.
6. Universal Item Identifiers.
7. Copy Item component.
8. Revision Maintenance component.
9. BOM Mass Maintenance by MMC.
10. BOM Mass Maintenance by ECO.
11. Item Loader process (IN\_ITMLOAD).

---

**Note.** To send the outbound data for BOM Mass Maintenance by MMC or by ECO, run both the ENPMMAIN COBOL process and the Publish Outbound Message (Item Revision option) process. To send the data for Revision Maintenance, run the Publish Outbound Message (Item Revision option) process.

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See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, “Assigning Publishing Rules”.

See *PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook*, “Understanding PeopleSoft Supply Chain Management Enterprise Integration Points,” PeopleSoft SCM Outbound EIPs.

See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, “Activating Integration Points”.

See *PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook*, “Understanding Warehouse Management Systems”.

## Message Structure

Each service operation uses a message to define the fields and records to be used in the EIP. The structure of the item messages is:

| Segment      | Parent       | Valid Relationships                                                                              |
|--------------|--------------|--------------------------------------------------------------------------------------------------|
| Item Master. | None.        |                                                                                                  |
| Item Detail. | Item Master. | 1:1 on effective-dated messages or both 1:1 and 1:many on messages that are not effective-dated. |
| Item UOM.    | Item Master. | 1:1 or 1:many.                                                                                   |

| Segment                      | Parent                    | Valid Relationships    |
|------------------------------|---------------------------|------------------------|
| Item Purchasing Attributes.  | Item Master.              | 1:0 or 1:1.            |
| Item Bus Unit Attributes.    | Item Master.              | 1:0, 1:1, or 1:many.   |
| Item Bus Unit Weight/Volume. | Item Bus Unit Attributes. | 1:0 or 1:1, or 1:many. |
| Item Revision.               | Item Bus Unit Attributes. | 1:0, 1:1, or 1:many.   |
| Item Category                | Item Master.              | 1:0, 1:1, or 1:many.   |
| Item Manufacturer            | Item Master               | 1:0, 1:1, or 1:many.   |
| Universal Item Identifier    | Item Master               | 1:0, 1:1, or 1:many.   |

## Message Segments

The segments that are delivered in each of the item messages vary depending on the source of the message. The tables that are provided under each of the data sources display the segments that are delivered based on the function that is being performed.

- The parent segment of the message is always included on the EIP transaction.  
If the parent segment does not have a PSCAMA record, or if it does have a PSCAMA record with a blank audit action code, then no modifications are made to the parent segment. In this case, the parent is included only for reference purposes.
- The EIP transaction is published if any fields for a source record are altered on any of the pages that are listed.  
The audit action code on the PSCAMA record is set to the appropriate code based on the action that is being performed (add, change, or delete). Because all fields of the source record are not sent on the EIP transaction, cases may exist in which transactions are published even though none of the fields have been modified. The logic that determines whether to publish a transaction only checks that the source record has been altered. It does not check field by field to determine whether the altered fields are on the message used by the EIP transaction.
- Because the logic that publishes the transaction does not check field by field to determine whether a specific field has been altered, all fields that are on a message segment are published if any field that is on the source record is altered.
- The item EIP transactions are published only for an item that has an *Approved* status.

## Define Item

The component sends out various segments of a message depending on the function that is being performed.

- Add mode with a status of *Approved*:

| Segment     | Audit Action | Comments and Data Rules |
|-------------|--------------|-------------------------|
| Item Master | A            | Always published        |
| Item Detail | A            | Always published        |
| Item UOM    | A            | Always published        |

- Update or Correction mode with an item that is saved with a new *Approved* status.

Because an item EIP transaction is never published until it is approved, all message segments for the item are used when approved:

| Segment                    | Audit Action | Comments and Data Rules      |
|----------------------------|--------------|------------------------------|
| Item Master                | A            | Always published.            |
| Item Detail                | A            | Always published.            |
| Item UOM                   | A            | Always published.            |
| Item Purchasing Attributes | A            | Published only if any exist. |
| Item Bus Unit Attributes   | A            | Published only if any exist. |
| Item Bus Unit Wgt/Vol      | A            | Published only if any exist. |
| Item Revision              | A            | Published only if any exist. |
| Item Category              | A            | Published only if any exist. |
| Item Manufacturer          | A            | Published only if any exist. |
| Universal Item Identifier  | A            | Published only if any exist. |

- Update or Correction mode with a previously approved item:

| Segment     | Audit Action   | Comments and Data Rules                                                         |
|-------------|----------------|---------------------------------------------------------------------------------|
| Item Master | C or space     | Always published.                                                               |
| Item Detail | C, D, or space | Published only if a field from the Inventory Item table (ITEM_INV) is modified. |

### Item UOM Page

The Item UOM page provides these message segments:

| Segment                   | Audit Action | Comments and Data Rules                                 |
|---------------------------|--------------|---------------------------------------------------------|
| Item Master               | Space        | Always published.                                       |
| Item UOM                  | A, C, or D   | Always published.                                       |
| Item Manufacturer         | Space        | Published only if GTINs are added, changed, or deleted. |
| Universal Item Identifier | A, C, or D   | Published only if GTINs are added, changed, or deleted. |

### Universal Item Identifiers Page

The Universal Item Identifiers page provides these message segments:

| Segment                   | Audit Action | Comments and Data Rules                                 |
|---------------------------|--------------|---------------------------------------------------------|
| Item Master               | Space        | Always published.                                       |
| Item Manufacturer         | Space        | Published only if GTINs are added, changed, or deleted. |
| Universal Item Identifier | A, C, or D   | Published only if GTINs are added, changed, or deleted. |

### Purchasing Attributes Page

The Purchasing Attributes page provides these message segments:

| Segment                    | Audit Action | Comments and Data Rules |
|----------------------------|--------------|-------------------------|
| Item Master                | Space        | Always published        |
| Item Purchasing Attributes | A or C       | Always published        |

## Define Business Unit Item Page

You can use Add or Update mode.

- Add mode: When the page is saved in Add mode, all message segments for the Item EIP are published with an Audit Action Code of *A*.

Interfacing systems that are only taking a transaction when the item is added to the business unit use this message to build all information for the item.

Interfacing systems that take transactions before a business unit is established update their item structures with the business unit level information:

| Segment                    | Audit Action | Comments and Data Rules                                                                                                                                                                                    |
|----------------------------|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Item Master                | A            | Always published.                                                                                                                                                                                          |
| Item Detail                | A            | Always published.                                                                                                                                                                                          |
| Item UOM                   | A            | Always published.                                                                                                                                                                                          |
| Item Purchasing Attributes | A            | Published only if it exists.                                                                                                                                                                               |
| Item Bus Unit Attributes   | A            | Only the business unit that is being added is published. In this situation, the relationship between the Item Master segment and the Item Bus Unit Attributes segment is always a one-to-one relationship. |
| Item Bus Unit Wgt/Vol      | A            | Published only if any exist.                                                                                                                                                                               |

- Update mode:

| Segment     | Audit Action | Comments and Data Rules |
|-------------|--------------|-------------------------|
| Item Master | Space        | Always published.       |

| Segment                  | Audit Action | Comments and Data Rules                                                                                                                                                                                      |
|--------------------------|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Item Bus Unit Attributes | C or space   | Only the business unit that is being changed is published. In this situation, the relationship between the Item Master segment and the Item Bus Unit Attributes segment is always a one-to-one relationship. |
| Item Bus Unit Wgt/Vol    | A, C, or D   | Only published if the BU_ITEMS_WTVOL is modified                                                                                                                                                             |

### Item Approval Page

Because the item EIP is never published until an item is approved, all segments for the item are published when it is approved:

| Segment                    | Audit Action | Comments and Data Rules      |
|----------------------------|--------------|------------------------------|
| Item Master                | A            | Always published.            |
| Item Detail                | A            | Always published.            |
| Item UOM                   | A            | Always published.            |
| Item Purchasing Attributes | A            | Published only if any exist. |
| Item Bus Unit Attributes   | A            | Published only if any exist. |
| Item Bus Unit Wgt/Vol      | A            | Published only if any exist. |
| Item Revision              | A            | Published only if any exist. |
| Item Category              | A            | Published only if any exist. |
| Item Manufacturer          | A            | Published only if any exist. |
| Universal Item Identifier  | A            | Published only if any exist. |

### Item Copy Page

The Item Copy page provides these message segments:

| Segment                    | Audit Action | Comments and Data Rules                   |
|----------------------------|--------------|-------------------------------------------|
| Item Master                | A or space   | Always published.                         |
| Item Detail                | A            | Published only if this segment is copied. |
| Item UOM                   | A            | Published only if this segment is copied. |
| Item Purchasing Attributes | A            | Published only if this segment is copied. |
| Item Bus Unit Attributes   | A            | Published only if this segment is copied. |
| Item Bus Unit Wgt/Vol      | A            | Published only if this segment is copied. |
| Item Category              | A            | Published only if any exist.              |

## REV Maintenance

The REV Maintenance page provides these message segments:

| Segment                  | Audit Action | Comments and Data Rules |
|--------------------------|--------------|-------------------------|
| Item Master              | Space        | Always published.       |
| Item Bus Unit Attributes | Space        | Always published.       |
| Item Bus Unit Wgt/Vol    | A, C, or D   | Always published.       |

## BOM Mass Maintenance by MMC and BOM Mass Maintenance by ECO

The BOM Mass Maintenance pages provide these message segments:

| Segment     | Audit Action | Comments and Data Rules |
|-------------|--------------|-------------------------|
| Item Master | Space        | Always published.       |

| Segment                  | Audit Action | Comments and Data Rules |
|--------------------------|--------------|-------------------------|
| Item Bus Unit Attributes | Space        | Always published.       |
| Item Bus Unit Wgt/Vol    | A, C, or D   | Always published.       |

### Item Loader Process

The Item Loader process provides different message segments depending on the action that is being taken with the item.

When adding a new item with an *Approved* status:

| Segment                    | Audit Action | Comments and Data Rules      |
|----------------------------|--------------|------------------------------|
| Item Master                | A            | Always published.            |
| Item Detail                | A            | Always published.            |
| Item UOM                   | A            | Always published.            |
| Item Purchasing Attributes | A            | Published only if it exists. |
| Item Bus Unit Attributes   | A            | Published only if it exists. |
| Item Bus Unit Wgt/Vol      | A            | Published only if it exists. |
| Item Revision              | A            | Published only if it exists. |
| Item Category              | A            | Published only if it exists. |
| Item Manufacturer          | A            | Published only if it exists. |
| Universal Item Identifier  | A            | Published only if it exists. |

When updating an existing item that has reached an *Approved* status:

| Segment     | Audit Action | Comments and Data Rules |
|-------------|--------------|-------------------------|
| Item Master | C or space   | Always published.       |

| Segment                    | Audit Action   | Comments and Data Rules                       |
|----------------------------|----------------|-----------------------------------------------|
| Item Detail                | C or space     | Published only if altered on inbound message. |
| Item UOM                   | A, C, or space | Published only if altered on inbound message. |
| Item Purchasing Attributes | C or space     | Published only if altered on inbound message. |
| Item Bus Unit Attributes   | A, C, or space | Published only if altered on inbound message. |
| Item Bus Unit Wgt/Vol      | A, C, or space | Published only if altered on inbound message. |
| Item Revision              | A, C, or space | Published only if altered on inbound message. |
| Item Category              | A, C, or space | Published only if altered on inbound message. |
| Item Manufacturer          | A, C, or space | Published only if altered on inbound message. |
| Universal Item Identifier  | A, C, or space | Published only if altered on inbound message. |

### Full Data Publish

This function is used to copy all items in the database to an interfacing system, or if chunking is being used, to copy all items for a specific chunking value. In this case, all data is published with an audit action code of A:

| Segment                    | Audit Action | Comments and Data Rules      |
|----------------------------|--------------|------------------------------|
| Item Master                | A            | Always published.            |
| Item Detail                | A            | Always published.            |
| Item UOM                   | A            | Always published.            |
| Item Purchasing Attributes | A            | Published only if it exists. |

| Segment                   | Audit Action | Comments and Data Rules      |
|---------------------------|--------------|------------------------------|
| Item Bus Unit Attributes  | A            | Published only if it exists. |
| Item Bus Unit Wgt/Vol     | A            | Published only if it exists. |
| Item Revision             | A            | Published only if it exists. |
| Item Category             | A            | Published only if it exists. |
| Item Manufacturer         | A            | Published only if it exists. |
| Universal Item Identifier | A            | Published only if it exists. |

## Sending Item Information to PeopleSoft CRM

If you are integrating with PeopleSoft CRM, you can use the CRM Item Sync EIPs to synchronize item data in the CRM and PeopleSoft Inventory systems. The CRM Item Sync EIPs are two service operations defined in PeopleSoft Integration Broker, ITEM\_CRM\_FULLSYNC\_EFF and ITEM\_CRM\_SYNC\_EFF. Use the ITEM\_CRM\_FULLSYNC\_EFF service operation to send a list of all items in the PeopleSoft Inventory Item Master table to CRM. The PeopleSoft CRM FieldService and Call Center applications use this item information for initial population of their Item Master tables. Use the ITEM\_CRM\_SYNC\_EFF service operation to send incremental updates automatically as item information is modified online or by the Item Loader process (IN\_ITMLOAD). When you use the ITEM\_CRM\_SYNC\_EFF service operation, you must also activate the internal ITEM\_CRM\_SYNC service operation. This service operation does not send data to the PeopleSoft CRM system, but it is essential for ITEM\_CRM\_SYNC\_EFF to work properly.

When you activate the ITEM\_CRM\_SYNC and ITEM\_CRM\_SYNC\_EFF service operations, outbound item information is generated from these five points within the PeopleSoft system as approved items are being maintained:

- Define Item component.
- Approve Item component.
- Units of Measure component.
- Copy Item component.
- Item Loader process (IN\_ITMLOAD).

See *PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook*, “Understanding PeopleSoft Supply Chain Management Enterprise Integration Points,” PeopleSoft SCM Outbound EIPs.

See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, “Understanding Integration Points”.

See *PeopleSoft Enterprise CRM Integrated FieldService PeopleBook*

See *PeopleSoft Enterprise CRM Call Center Applications PeopleBook*

## Setting Up the CRM Item Sync EIPs

PeopleSoft delivers the service operations in PeopleSoft Integration Broker with a default status of *Inactive*. You must activate each service operation before attempting to send or receive data from a third-party source or another PeopleSoft system, such as CRM. To set up this service operation:

1. Setup within the PeopleSoft Inventory application:

There are no setup steps within PeopleSoft Inventory.

2. Setup within PeopleSoft Integration Broker and Enterprise Components:

Use the information in the following table and refer to the setup instruction in the PeopleSoft Supply Chain Management Integrations 9.0 PeopleBook, “Implementing Integrations” chapter, Setting Up Service Operations section.

| Service Operation     | Direction and Type       | Handlers       | Chunking Available? | Integrates With |
|-----------------------|--------------------------|----------------|---------------------|-----------------|
| ITEM_CRM_FULLSYNC_EFF | Outbound<br>Asynchronous |                | No                  | CRM             |
| ITEM_CRM_SYNC_EFF     | Outbound<br>Asynchronous |                | No                  | CRM             |
| ITEM_CRM_SYNC         | Local<br>Asynchronous    | ItemCRMSyncEff | No                  | CRM             |

See *PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook*, “Implementing Integrations,” Setting Up Service Operations.

See *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*

## Message Structure

Each service operation uses a message to define the fields and records to be used in the EIP. The structure of this item messages is:

| Segment         | Parent      | Valid Relationships                                                                              |
|-----------------|-------------|--------------------------------------------------------------------------------------------------|
| Item Master     | (None)      |                                                                                                  |
| Item Detail     | Item Master | 1:1 on effective-dated messages or both 1:1 and 1:many on messages that are not effective-dated. |
| Item Substitute | Item Master | 1:0, 1:1, or 1:many.                                                                             |

| Segment  | Parent      | Valid Relationships |
|----------|-------------|---------------------|
| Item UOM | Item Master | 1:1 or 1:many.      |
| UOM Type | Item UOM    | 1:1 or 1:many.      |

## Message Segments

The segments that are delivered in each of these item messages varies depending on the source of the message. The tables that are provided under each of the data sources that are listed display the segments that are delivered based on the function that is being performed.

- The parent segment of the message is always included on the EIP transaction.  
If the parent segment does not have a PSCAMA record, or if it does have a PSCAMA record with a blank audit action code, then no modifications were made to the parent segment. In this case, the parent is included only for reference purposes.
- The EIP transaction is published if any fields for a source record are altered on any of the pages that are listed.  
The audit action code on the PSCAMA record is set to the appropriate code based on the action that is being performed. Because all fields on the source records are not sent on the transaction, cases might exist where data is published even though none of the fields have been modified. The logic that determines whether to publish an EIP transaction only checks that the source record has been altered. It does not check field by field to determine whether the altered fields are on the message used by the EIP transaction.
- Because the logic that publishes the transaction does not check field by field to determine whether a specific field has been altered, all fields that are on a message segment are published if any field on the source record is altered.
- The item EIP transactions are published only for an item that has an *Approved* status.

## Define Item

The Define Item component sends out various segments of the item message depending on the function that is being performed.

- Add mode with a status of *Approved*:

| Segment         | Audit Action | Comments and Data Rules      |
|-----------------|--------------|------------------------------|
| Item Master     | A            | Always published.            |
| Item Detail     | A            | Always published.            |
| Item UOM        | A            | Always published.            |
| UOM Type        | A            | Always published.            |
| Item Substitute | A            | Published only if any exist. |

- Update or Correction mode with an item that is saved with a new *Approved* status. Because an item EIP transaction is never published until it is approved, all message segments for the item are used when approved:

| Segment         | Audit Action | Comments and Data Rules      |
|-----------------|--------------|------------------------------|
| Item Master     | A            | Always published.            |
| Item Detail     | A            | Always published.            |
| Item UOM        | A            | Always published.            |
| UOM Type        | A            | Always published.            |
| Item Substitute | A            | Published only if any exist. |

- Update or Correction mode with an item that was previously approved:

| Segment         | Audit Action   | Comments and Data Rules                                                                |
|-----------------|----------------|----------------------------------------------------------------------------------------|
| Item Master     | C or space     | Always published.                                                                      |
| Item Detail     | C, D, or space | Published only if a field from the Inventory Item table (ITEM_INV) is modified.        |
| Item Substitute | C, D           | Published only if a field from the Item Substitute table (SUBSTITUTE_ITM) is modified. |

## Item UOM Page

The Item UOM page provides these message segments:

| Segment     | Audit Action | Comments and Data Rules |
|-------------|--------------|-------------------------|
| Item Master | Space        | Always published.       |
| Item UOM    | A, C, or D   | Always published.       |
| UOM Type    | A, C, or D   | Always published.       |

## Item Approval Page

Because an item EIP transaction is never published until it is approved, all message segments for the item are used when approved:

| Segment         | Audit Action | Comments and Data Rules      |
|-----------------|--------------|------------------------------|
| Item Master     | A            | Always published.            |
| Item Detail     | A            | Always published.            |
| Item UOM        | A            | Always published.            |
| UOM Type        | A            | Always published.            |
| Item Substitute | A            | Published only if any exist. |

### Item Copy Page

The Item Copy page provides these message segments:

| Segment         | Audit Action | Comments and Data Rules                   |
|-----------------|--------------|-------------------------------------------|
| Item Master     | A or space   | Always published.                         |
| Item Detail     | A            | Published only if this segment is copied. |
| Item UOM        | A            | Published only if this segment is copied. |
| UOM Type        | A            | Published only if this segment is copied. |
| Item Substitute | A            | Published only if any exist.              |

### Item Loader Process

The Item Loader process provides different message segments depending on the action that is being taken with the item:

When adding a new item in an *Approved* status:

| Segment     | Audit Action | Comments and Data Rules |
|-------------|--------------|-------------------------|
| Item Master | A            | Always published.       |
| Item Detail | A            | Always published.       |

| Segment  | Audit Action | Comments and Data Rules |
|----------|--------------|-------------------------|
| Item UOM | A            | Always published.       |
| UOM Type | A            | Always published.       |

When updating an existing item that has reached an *Approved* status:

| Segment     | Audit Action   | Comments and Data Rules                       |
|-------------|----------------|-----------------------------------------------|
| Item Master | C or space     | Always published.                             |
| Item Detail | C or space     | Published only if altered on inbound message. |
| Item UOM    | A, C, or space | Published only if altered on inbound message. |

## Full Data Publish

This function is used to copy all items in the database to an interfacing system, or if chunking is being used, to copy all items for a specific chunking value. In this case, all transactions are published with an audit action code of *A*:

| Segment     | Audit Action | Comments and Data Rules |
|-------------|--------------|-------------------------|
| Item Master | A            | Always published.       |
| Item Detail | A            | Always published.       |
| Item UOM    | A            | Always published.       |
| UOM Type    | A            | Always published.       |

## Receiving Inbound Data with the Item Master EIP and the Item Price List EIP

You can receive inbound item data by using any of the Item Master EIPs that are listed in the previous section. With the Item Price List EIP, you can receive item price list data that is sent by third-party sources using the ITEM\_PRICELIST\_LOAD service operation. The ITEM\_PRICELIST\_LOAD service operation supports requirements of the X.12 832 - Price/Sales transaction set.

Item records that are created from EIPs or flat files are inserted into the item loader staging tables for inbound processing. The Item Loader process validates the staged data, and if no errors are found, updates the database. You can correct any errors that are flagged by the Item Loader process by using the Data Definition Maintenance component.

**See Also**

*PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, “Understanding Integration Points”



## CHAPTER 3

# Defining Item Control Values

This chapter provides an overview of item control values and discusses how to set definitions for item control values.

---

## Understanding Item Control Values

With PeopleSoft Inventory, you can organize and group inventory items according to many different characteristics, or *attributes*. To set up item attributes, use the components in the Define Controls menu. When defined, these attributes become selection options and are used as the default values on pages that are used for defining new items.

---

## Setting Definitions for Item Control Values

To define item family routings or item group routings, use the Item Family Routing Assignment component or the Item Group Routing Assignment component.

This section discusses how to:

- Define charge codes.
- Assign item default values.
- Assign items to item families.
- Assign items to groups.
- Define item numbering.
- Establish item templates.
- Group items in demand priority families.
- Define stocking periods.
- Define utilization types.
- Define utilization groups.

## Pages Used to Set Definitions for Item Control Values

| Page Name             | Object Name       | Navigation                                    | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-----------------------|-------------------|-----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Brand Names           | BRAND_NAMES_INV   | Items, Define Controls, Brand Names           | <p>To associate inventory items with brand names that are valid over specific time periods, use the Brand Names (PROD_BRAND_NAME_GBL) component. Brand names that are defined on this page are informational only and are not used by PeopleSoft Inventory.</p> <p><b>Note.</b> If you select the Item Approval Required option on the Installation Options - Overall/GL (installation options - overall/general ledger) page, items must be approved before you can assign brand names.</p> |
| Charge Codes          | CHARGE_CODE_INV   | Items, Define Controls, Charge Codes          | Define charge codes that define how items should be charged when consumed from a par location.                                                                                                                                                                                                                                                                                                                                                                                               |
| Grades                | PRODUCT_GRADE_INV | Items, Define Controls, Grades                | <p>To define internal rating levels for items and lots, use the Grades (PRODUCT_GRADE_INV_GBL) component. The information defined on this page is used on the Define Item - General: Classifications page, the Item Templates page, and the Lot Control Information page.</p>                                                                                                                                                                                                                |
| Hazard/Disposal Codes | HAZARD_TYPE_INV   | Items, Define Controls, Hazard/Disposal Codes | <p>To define hazard codes, use the Hazard/Disposal Codes component (INV_HAZ_TYPES_GBL). Define codes for any special handling instructions. The information that is defined in this page is used on the Item Templates page and the Define Item - General: Classifications page.</p>                                                                                                                                                                                                         |

| Page Name                                         | Object Name       | Navigation                                                         | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|---------------------------------------------------|-------------------|--------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Item Attributes Group                             | EN_CHGOVER_GRP    | Items, Define Controls, Item Attributes Group                      | <p>If you use PeopleSoft Supply Planning, use the Item Attributes Group (EN_CHGOVER_GRP_GBL) component to set up attribute groups. Items that belong to specific attribute groups can be assigned to specific resources (for example, crews, machines, and tools).</p> <p><b>Note.</b> If you are using PeopleSoft Supply Planning, you must define item attribute groups to assign resource changeover penalties on the Crews - Changeover page, the Machines - Changeover page, or the Tools - Changeover page in the PeopleSoft Manufacturing application.</p> |
| Item Default Values                               | INV_ITEM_DEFAULTS | Items, Define Controls, Item Default Values                        | Define item default values to establish item attributes that are automatically assigned to each new item. All inventory items in the setID can share these attributes.                                                                                                                                                                                                                                                                                                                                                                                            |
| Item Families                                     | PROD_FAMILY_INV   | Items, Define Controls, Item Families                              | Establish item family options.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Family Rtg Assignment (family routing assignment) | EN_RTG_FAMILY     | Items, Define Controls, Item Family Routing, Family Rtg Assignment | Assign items to item families by using the Item Family Routing (EN_RTG_FAMILY_GBL) component. If you are using PeopleSoft Manufacturing, you can define a routing for each item that you manufacture. To reference another item's routing, use the Define Business Unit Item - Manufacturing: General page.                                                                                                                                                                                                                                                       |
| Item Groups                                       | INV_ITEM_GROUP    | Items, Define Controls, Item Groups                                | Assign items to item groups to group similar items together.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

| Page Name                                          | Object Name        | Navigation                                                                                                                                  | Usage                                                                                                                                                                                                                                                                                                               |
|----------------------------------------------------|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Group Rtg Assignment<br>(group routing assignment) | EN_RTG_GROUP       | Items, Define Controls, Item Group Routing, Group Rtg Assignment                                                                            | Use the Item Group Routing (EN_RTG_GROUP_GBL) component to assign items to item groups. If you are using PeopleSoft Manufacturing, you can define a routing for each item that you manufacture.                                                                                                                     |
| Item Number Control                                | ITEM_NBR_CONTROL   | Items, Define Controls, Item Number Control                                                                                                 | Define item numbering to determine whether new inventory items are sequentially numbered or manually numbered.                                                                                                                                                                                                      |
| Item Templates                                     | INV_ITEM_TEMPLATES | Items, Define Controls, Item Templates                                                                                                      | Establish item templates to create various sets of item attribute defaults, which are used when defining new items.                                                                                                                                                                                                 |
| Item Types                                         | INV_ITEM_TYPES     | Items, Define Controls, Item Types                                                                                                          | To group inventory items by function, use the Item Types (INV_ITEM_TYPES_GBL) component. For example, you can group expense, service, or inventory items. The information that is defined on this page is used on the Define Item - General: Classifications page and the Defining Purchasing Item Categories page. |
| Manufacturers                                      | MANUFACTURER       | Items, Define Controls, Manufacturers<br><br>Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Manufacturer | Select a default universal item ID for a manufacturer, and determine whether the manufacturer is locally owned.<br><br>See <a href="#">Chapter 2, “Working with Items,” Using Universal Item Identifiers, page 21</a> .                                                                                             |

| Page Name                                                 | Object Name      | Navigation                                     | Usage                                                                                                                                                                                                                                                                                                                                                                                                   |
|-----------------------------------------------------------|------------------|------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| MSDS Identifiers (material safety data sheet identifiers) | MSDS_ID_INV      | Items, Define Controls, MSDS Identifiers       | To create IDs for items that require a material safety data sheet (MSDS), use the MSDS Identifiers (ITEM_MSDS_ID_GBL) component. PeopleSoft Inventory does not provide standard MSDS documents. Instead, you define an informational code to be used when processing items in the system. The information that is defined here is used on the Define Item - Inventory: Shipping/Handling page.          |
| Packing Codes                                             | PACKING_CODE_INV | Items, Define Controls, Packing Codes          | To create informational codes for items that require special packing routines, use the Packing Codes component (PACKING_CODE_GBL). The information that is defined on this page is used on the Define Item - Inventory: Shipping/Handling page, on the Define Business Unit Item - Inventory: Weight/Volume page, in the Packing Session component (PACK_EST_SHIP_GBL), and on the Item Templates page. |
| Demand Priority Family                                    | PL_PRIO_FAMILY   | Items, Define Controls, Demand Priority Family | Group items in demand priority families by setting up demand priority groups that you can then associate with an item.                                                                                                                                                                                                                                                                                  |
| Potency Codes                                             | POTENCY_CODE_INV | Items, Define Controls, Potency Codes          | To create informational codes to specify an item's potency, use the Potency Codes (POTENCY_CODE_INV_GBL) component. The information that is defined on this page is used on the Define Item - General: Classifications page.                                                                                                                                                                            |

| Page Name             | Object Name       | Navigation                                                                | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------------|-------------------|---------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Replenishment Classes | INV_REPLEN_CLASS  | Items, Define Controls, Replenishment Classes                             | To create groupings for items that are subject to automated periodic replenishment within a business unit, use the Replenishment Classes (REPLENISH_CLASS_GBL) component. The information that is defined on this page is used on the Define Business Unit Item - Inventory: Replenishment page, the Replenishment Parameters page, and the Replenishment Options page.                                                                         |
| Stock Types           | INV_STOCK_TYPE    | Items, Define Controls, Stock Types                                       | To create ownership information codes for items that are leased or consigned, use the Stock Types (INV_STOCK_TYPE_GBL) component. A stock type must be assigned during putaway of non-owned items. The information that is defined on this page is used on the Define Item - General: Classifications page, the Item Templates page the Define Item - Inventory: Shipping/Handling page, the Manual Staging page, and the Express Putaway page. |
| Stocking Periods      | STOCK_PERIOD_INV  | Items, Define Items and Attributes, Stocking Periods                      | Define stocking periods by setting up time-phased safety stock and excess stock levels for PeopleSoft Supply Planning. You can also populate this page by either uploading data from a third-party forecasting system or using PeopleSoft Inventory Planning and Demand Planning.                                                                                                                                                               |
| Storage Rules         | STOR_INSTRUCT_INV | Set Up Financials/Supply Chain, Product Related, Inventory, Storage Rules | To define special storage requirements for items, use the Storage Rules (STOR_INSTRUCTION_GBL) component. The information that is defined on this page is used on the Define Item - Inventory: Shipping/Handling page, the Item Templates page, and the Putaway Detail page.                                                                                                                                                                    |

| Page Name                                      | Object Name    | Navigation                                      | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|------------------------------------------------|----------------|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Universal Item ID Types                        | UPN_TYPE_CD    | Items, Define Controls, Universal Item ID Types | Define universal item ID types at the setID level, and determine whether the ID represents a GTIN.<br><br>See <a href="#">Chapter 2, “Working with Items,” Using Universal Item Identifiers, page 21</a> .                                                                                                                                                                                                                                                                                                                                                   |
| Utilization Types                              | UTIL_TYPE_INV  | Items, Define Controls, Utilization Types       | Define utilization types define the ABC classifications to use in the environment. For example, you may decide to classify items as <i>A</i> , <i>B</i> , and <i>C</i> , or <i>High</i> , <i>Medium</i> , and <i>Low</i> . The Utilization Type Calculation process assigns utilization types to individual items by business unit and utilization group.<br><br><b>Note.</b> On the Perform Physical Accounting pages, utilization types are selected in alphabetical order.                                                                                |
| Util Group Inv (utilization group - inventory) | UTIL_GROUP_INV | Items, Define Item Controls, Utilization Groups | Define utilization groups for each ABC utilization grouping that you want to maintain in the system. For example, establish utilization groups for cycle counting, planning, material handling, or performance reporting. Each utilization group can use different parameters to assign items to a specific utilization type. For example, the inventory control supervisor may consider an item to be a <i>C</i> item because it is a slow mover, but the purchasing department may consider that same item to be a <i>B</i> item because of its lead time. |

## Defining Charge Codes

To define charge codes, use the Charge Codes component (CHARGE\_CODE\_INV\_GBL).

Access the Charge Codes page.

The information that is defined on this page is used on the Define Par Location - Line page, the Consumer Usage page, and Consumer Usage Entry page. You can also capture the charge code during material usage tracking and pass it to a third-party billing system.

## See Also

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Managing Par Inventory”

## Assigning Item Default Values

To assign item default values, use the Item Defaults (ITEM\_DEFAULTS\_GBL) component.

Access the Item Default Values page.

---

**Note.** Modification of the item default values do not change existing item data.

---

|                       |                                                                                                                                                                                                                                                                                                                                                                                                               |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Item Tracking</b>  | Select a value to define the type of stocking control that is most commonly used by items in this setID.                                                                                                                                                                                                                                                                                                      |
| <b>Lot</b>            | Select when inventory items are either produced or otherwise grouped in distinct and identifiable subsections, often referred to as <i>lots</i> . Lots often represent production runs. Default values for items that are not lot-controlled are defined on the Installation Options - Inventory page.                                                                                                        |
| <b>Serial</b>         | Select when each inventory item in stock is managed in units of one. Default values for items that are not serial-controlled are defined on the Installation Options - Inventory page.                                                                                                                                                                                                                        |
| <b>Ship Serial</b>    | Select when serial tracking is required only at the time of shipment. Ship-serial items can be moved throughout the inventory business unit without serial control, which simplifies transaction processing and entry. Serial numbers are then assigned at the time of shipment to provide serial tracking on products that are shipped to customers, internal locations, and other inventory business units. |
| <b>Non-Owned Item</b> | Select if the majority of the items are maintained in inventory but not owned by the business unit.                                                                                                                                                                                                                                                                                                           |
| <b>Create Product</b> | Select when a product ID is to be created the majority of the time. The product ID will be created when you save the Define Item component.                                                                                                                                                                                                                                                                   |
| <b>Item Type</b>      | Select an item type if the majority of the items will use the same value.                                                                                                                                                                                                                                                                                                                                     |
| <b>Costing Group</b>  | Select a cost profile group if the majority of the items will use the same value.                                                                                                                                                                                                                                                                                                                             |
| <b>Category Code</b>  | Select a category code if the majority of the items will use the same value.                                                                                                                                                                                                                                                                                                                                  |
| <b>Cost Element</b>   | Select a cost element if the majority of the items will use the same value.                                                                                                                                                                                                                                                                                                                                   |
| <b>UPN Type Code</b>  | Select a universal item ID type code to be used for entering a global trade item number within a setID.<br><br>This value also determines which universal item identifier represents GTIN data when you are publishing to the UCCNet, and the GTIN to use when you are generating RFID tags.                                                                                                                  |

## See Also

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Preparing to Implement PeopleSoft Inventory”

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Managing Consigned Purchases Inventory”

## Assigning Items to Item Families

To create item families, use the Item Families (INV\_PROD\_FAMILIES\_GBL) component.

Access the Item Families page.

In PeopleSoft Inventory, you can categorize items by groups and families. No formal relationship exists between item groups and item families, but you can use an item family to further classify an item group. For example, you can define the hardware group as consisting of families of printers and monitors.

The information that is defined on this page is used on the Define Item - General: Common page when you are setting up cycle counting events on the Event Creation Process page, as an alternate search key for item ID, and as a selection criteria when you are running the Inventory Value report, the Cost Profiles report, the Basic Item Listing report, and the Stock Status report.

When you associate an item with a family on the Family Rtg Assignment page or with a group on the Group Rtg Assignment page, you can also associate it with a reference routing item ID. Floor stock, expensed items, and planning items, however, cannot be specified as a reference routing. When this information is defined, you can set up master routings by item family or by item group on the Define Business Unit Item - Manufacturing: General page.

### See Also

*PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Structuring Routings”

## Assigning Items to Groups

To create item groups, use the Item Groups (INV\_ITEM\_GROUPS\_GBL) component.

Access the Item Groups page.

The information that is defined on this page is used on the Define Item - General: Common page as an alternate search key for item ID when you are defining transaction accounting rules and as a selection criterion when you are running the Inventory Value report, the Cost Profiles report, the Basic Item Listing report, and the Stock Status report. In manufacturing environments, item group information can also be specified on the Group Rtg Assignment page.

## Defining Item Numbering

To enable automatic numbering, use the Item Number Control (INV\_ITEM\_CONTROL\_GBL) component.

Access the Item Number Control page.

If you enable automatic numbering, you can still manually enter item IDs when adding new items. To do so, enter an item ID number and override the value of *NEXT*. The *NEXT* value tells PeopleSoft Inventory to create the item ID with the next unique sequential number.

---

**Note.** If you do not select the Auto Number Items check box, you must manually enter an ID when defining new inventory items.

---

## Establishing Item Templates

To create item templates, use the Item Templates (ITEM\_TEMPLATE\_GBL) component.

Access the Item Templates page.

After entering the required information on the Define Item - General pages, you can select the template ID on the Define Item - General: Classifications page to automatically complete many of the other item attribute default values in the rest of the component. You can override these default values. Template modifications do not change existing item data.

## Grouping Items in Demand Priority Families

Access the Demand Priority Family page.

After you define the demand priority family, you can use it to group like items for independent demand prioritization purposes. You assign the demand priority family to each item using the Define Item - General: Common page. After you assign a demand priority family to a group of items, you can set demand priorities by family priority grouping using the Demand Prioritization page in PeopleSoft Supply Planning.

## Defining Stocking Periods

To create stocking periods, use the Stocking Periods (STOCK\_PERIOD\_GBL) component.

Access the Stocking Periods page.

---

**Note.** The information on this page supersedes any stocking level information that you enter when you set up item attributes at the business unit level.

---

|                                       |                                                                                                                                                                                                                                  |
|---------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Multiple</b>                       | Displays the stock-keeping unit of measure for the item.                                                                                                                                                                         |
| <b>Start Date and End Date</b>        | Enter the dates that determine the period for which the corresponding safety stock and excess stock is established within PeopleSoft Supply Planning.                                                                            |
| <b>Safety</b>                         | Enter the preferred level to which you want to increase stock when you pass the Safe Limit (safety stock level). For example, if stock falls below 45, then you might want to create enough supply to bring the level up to 100. |
| <b>Safe Limit</b>                     | Enter the lowest quantity that stock should not surpass. This is the safety stock.                                                                                                                                               |
| <b>Excess</b>                         | Enter the preferred level to which you want to decrease stock when you pass the Ex. Limit (excess stock limit). For example, if stock goes above 10,000, you can bring it down to 7,500.                                         |
| <b>Ex. Limit</b> (excess stock limit) | Enter the highest quantity that stock should not surpass.                                                                                                                                                                        |

Stock limits must always be equal to or less than the preferred stocking levels. In addition, safety stock levels must be less than or equal to excess stocking levels.

---

**Note.** If you use PeopleSoft Supply Planning, the quantities that you enter on this page should be in multiples of the quantity that is defined in the Order Multiple fields on the Define Business Unit Item - Planning: Order Modifiers page.

---

If you use PeopleSoft Demand Planning or Inventory Policy Planning, you can populate this page using a two-step process:

1. Create a flat file by running the Inventory Policy Export process in PeopleSoft Inventory Policy Planning.
2. Upload the file using the Forecast/Replenishment process in PeopleSoft Demand Planning.

If you use PeopleSoft Inventory, you can upload forecast data from a third-party forecast planning application.

### See Also

*PeopleSoft Enterprise Demand Planning 9.0 PeopleBook*, “Understanding PeopleSoft Demand Planning”

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Replenishing Inventory,” Integrating With a Third-Party Forecast Planning Application

## Defining Utilization Types

To create utilization types, use the Utilization Types (INV\_UTILIZ\_TYPES\_GBL) component.

Access the Utilization Types page.

Create utilization types to define the ABC classifications to be used in the environment. Utilization types can be used to classify inventory items for numerous reasons including cycle counting, planning, material handling, or performance reporting. Utilization types that are assigned to an item ID can be viewed on the Define Business Unit Item - Inventory: Utilization Types page.

## Defining Utilization Groups

To create utilization groups, use the Utilization Groups (INV\_UTILIZ\_GROUPS\_GBL) component.

Access the Util Group Inv page.

### For Cycle Count

Select to make this the default utilization group for cycle counting. Anytime that you change the default, the system updates the Counting Event Utilization Types table (COUNT\_UTIL\_INV).

---

**Note.** If you use the Due to Count cycle-counting method, you must define a default cycle count group; otherwise, you receive an error message on the Counting Event - Utilization Types page.

---

### For Planning

Select to make this the default utilization group for inventory planning. You can override this default on the Define Business Unit Item - Inventory: Utilization Types page.

### Build Group Items

Click to add all items that meet the criteria that is defined in the Utilization Group Details group box to this utilization group. This link adds the appropriate items to the Business Unit Item Utilization Code table (BU\_ITEM\_UTIL\_CD). If you click the link for an existing utilization group, the system replaces all items with items that meet the criteria that is specified here.



# CHAPTER 4

## Defining Items by SetID

This chapter discusses how to:

- Define items at the setID level.
- Approve item definitions.
- Associate an item with a unit of measure (UOM).
- Copy items.
- Substitute items.

---

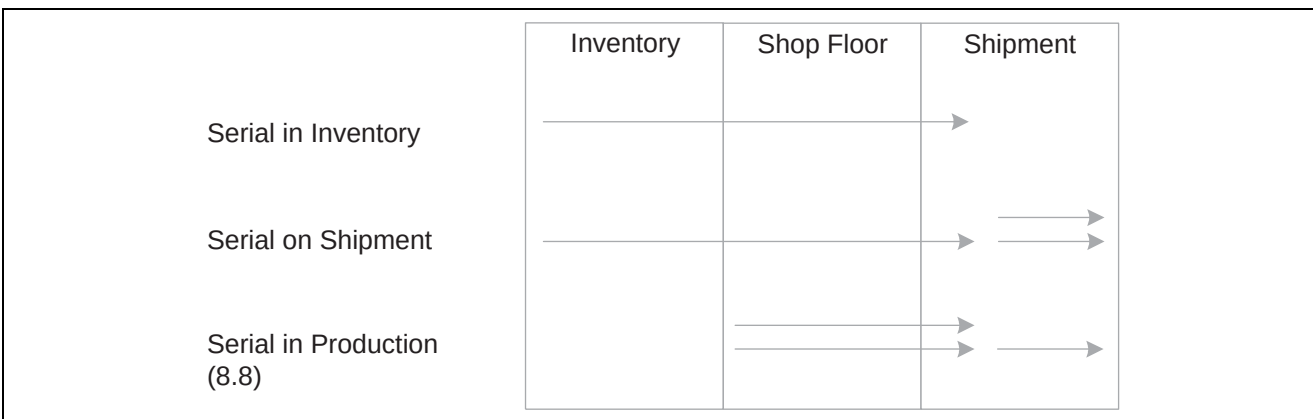
### Defining Items at the SetID Level

Before processing an inventory item in a PeopleSoft application, you must define the item within the system. Items are defined at the setID level first; then they are defined at the business unit level.

To establish an item ID and the corresponding attributes for a setID, use the Define Item (ITEM\_DEFIN) component. You can either define new item attributes or modify item-attribute default or template information, which you set up by using the pages that are accessed from the Define Controls menu.

Use the Define Item component to establish lot-controlled or serial-controlled components.

This diagram illustrates how the PeopleSoft application handled serial processing prior to release 8.8:



How the PeopleSoft applications handled serial processing prior to Release 8.8

This section discusses how to:

- Define general item information.
- Define additional item attributes.
- Define item dimensions.

- Define material usage attributes.
- Establish item tracking and lot-control attributes.
- Establish item shipping and handling attributes.
- Define configuration attributes for an item.

## Pages Used to Define Items at the SetID Level

| Page Name                                     | Object Name        | Navigation                                                                                                     | Usage                                                            |
|-----------------------------------------------|--------------------|----------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|
| Define Item - General: Common                 | INV_ITEMS_DEFIN1   | Items, Review Item Information, Items, General<br>Items, Define Items and Attributes, Define Item, General     | Define general item information at the setID level.              |
| Define Item - Item Image                      | INV_ITEM_IMAGE_SEC | Click the Item Image link on the Define Item - General: Common page.                                           | Maintain an image of an item.                                    |
| Define Item - Manufacturer's Item             | ITM_MFG_SP         | Click the Manufacturers link on the Define Item - General: Common page.                                        | Define information about the item's manufacturer.                |
| Define Item - General: Classifications        | INV_ITEMS_DEFIN4   | Items, Review Item Information, Items, General<br>Items, Define Items and Attributes, Define Item, General     | Define additional item attributes.                               |
| Define Item - General: Dimensions             | INV_ITEMS_DEFIN3   | Items, Review Item Information, Items, General<br>Items, Define Items and Attributes, Define Item, General     | Define item dimensions such as size and color.                   |
| Define Item - General: Usage                  | INV_ITEMS_DEFIN8   | Items, Review Item Information, Items, General<br>Items, Define Items and Attributes, Define Item, General     | Define material usage attributes for an item at the setID level. |
| Define Item - Inventory: Tracking/Description | INV_ITEMS_DEFIN2   | Items, Review Item Information, Items, Inventory<br>Items, Define Items and Attributes, Define Item, Inventory | Establish tracking item and lot-control attributes.              |
| Define Item - Inventory: Shipping/Handling    | INV_ITEMS_DEFIN5   | Items, Review Item Information, Items, Inventory<br>Items, Define Items and Attributes, Define Item, Inventory | Establish item shipping and handling attributes.                 |

| Page Name                       | Object Name       | Navigation                                                                                                                 | Usage                                                                                                                                                       |
|---------------------------------|-------------------|----------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Define Item - Substitutes       | INV_ITEMS_DEFIN7  | Items, Review Item Information, Items, Substitutes<br><br>Items, Define Items and Attributes, Define Item, Substitutes     | Establish or maintain substitute items.<br><br>See Chapter 4, “ <a href="#">Defining Items by SetID.</a> ”<br><a href="#">Substituting Items</a> , page 91. |
| Define Item - Configuration     | INV_ITEMS_DEFIN6  | Items, Review Item Information, Items, Configuration<br><br>Items, Define Items and Attributes, Define Item, Configuration | Define configuration attributes for an item if you are using PeopleSoft Product Configurator.                                                               |
| Define Item - Custom: Character | INV_ITEMS_DEFIN9  | Items, Review Item Information, Items, Custom<br><br>Items, Define Items and Attributes, Define Item, Custom               | Define alphanumeric field values at the setID level for item attributes that are unique to the enterprise.                                                  |
| Define Item - Custom: Numeric   | INV_ITEMS_DEFIN10 | Items, Review Item Information, Items, Custom<br><br>Items, Define Items and Attributes, Define Item, Custom               | Define numeric field values at the setID level for item attributes that are unique to the enterprise.                                                       |

## Defining General Item Information

Access the Define Item - General: Common page.

General
Inventory
Substitutes
Configuration
Custom
Audit

Common
[Classifications](#)
[Dimensions](#)
[Usage](#)

SetID: SHARE    Item ID: 10000

\*Description: Long Sleeve Biking Jersey, Men's

Item Status

Current Status Date: 04/15/2000    \*Current Status: Active

Future Status Date:    Future Status:

Copy Item Status

Item Type
☒ Inventory Item
☐ Non-Owned Item
☐ Consigned Purchase

\*Standard UOM: EA    Each    Default Category: CYCLING

\*Physical Nature: Goods

Item Group: APPAREL    Apparel

Family: COMMON    Common

Demand Priority:

Cost Profile Group: 1003    Buy Items

Promise Option: Perform ATP Reservations

[Item Image](#)    [Manufacturers](#)    [Purchasing Item Attributes](#)    [Units Of Measure](#)

Define Item - General: Common page

|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Item ID</b>                              | Item IDs cannot have embedded spaces or special characters. If you use automatic numbering for items, leave the item ID as <i>NEXT</i> , to assign the next sequential number, or enter an item ID manually. PeopleSoft Inventory uses the item ID as its primary search key for the item master file.                                                                                                                                                                                                                                                                                                                                              |
| <b>Current Status Date</b>                  | If you modify the item status, the current status date is automatically updated to reflect the date of the change.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Current Status</b>                       | <p>Select a value: <i>Under Initialization</i>, <i>Pending Approval</i>, <i>Denied Approval</i>, <i>Active</i>, <i>Hold</i>, <i>Discontinue</i>, or <i>Inactive</i>.</p> <p>However, you can select only a subset of these status values. If the item is <i>Under Initialization</i>, you can set the Current Status field to <i>Pending Approval</i>. After the item definition is approved, either automatically or manually, you can set the status to <i>Hold</i> or <i>Discontinue</i>.</p>                                                                                                                                                    |
| <b>Future Status Date and Future Status</b> | <p>Enter a date and a status that the Change Item Status (RUN_INS4000) process implements.</p> <hr/> <p><b>Note.</b> You cannot select a future status of <i>Inactive</i> for certain items. If an item is defined for a business unit and used in PeopleSoft Manufacturing on the Define Business Unit Item - General: Costing page (Used for MFG option), it cannot be inactivated at the business unit or the setID level.</p> <hr/>                                                                                                                                                                                                             |
| <b>Copy Item Status</b>                     | Click to access the Copy SetID to BU Item Status page, where you can copy the item status for the setID to any of the business units for which the item is defined.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Inventory Item</b>                       | Indicates that the item is physically stocked in inventory. The attributes that you enter for a non-inventory item at the business unit level are limited to support PeopleSoft Manufacturing and PeopleSoft Supply Planning. This enables you to add non-inventory items, such as documentation or user manuals, to the bill of material (BOM). Additionally, you can create forecasts at a family or group level by defining planning items and planning BOMs. You cannot create transactions for non-inventory items in PeopleSoft Inventory.                                                                                                    |
| <b>Non-Owned Item</b>                       | This selection can be overridden on the Define Business Unit Item - General: Common page. PeopleSoft Inventory does not create accounting entries for non-owned item transactions. To identify the owner of the stock, you must also indicate the stock type on the Define Item - General: Classifications page. You can change the selection at the time of putaway by using the Manual Staging page or the Express Putaway page.                                                                                                                                                                                                                  |
| <b>Consigned Purchase</b>                   | This option is available if the item is non-owned. The selection that you make is supplied by default at the business unit level, and you cannot override it on the Define Business Unit Item - General: Common page.                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Standard UOM</b>                         | <p>Select the most common UOM for the item. UOMs that you establish on the Units of Measure page under the Common Definitions menu are available for selection.</p> <p>The measurement that you select must be valid for stocking, shipping, and ordering. PeopleSoft Inventory maintains the quantity on hand for an item and its cost in the standard UOM. Because of the quantity-on-hand and the costing calculations, you cannot change this selection for an item after the first transaction in PeopleSoft Inventory. These transactions include setting up an item vendor relationship on the Purchasing Attributes - Item Vendor page.</p> |

---

|                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                              | <p><b>Warning!</b> To minimize rounding discrepancies when using multiple UOMs, use the smallest valid UOM for the item as the standard UOM, and make it a whole number.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Default Category</b>      | You must select a value if you have PeopleSoft Purchasing installed to categorize the item appropriately for the purchasing catalogs.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Physical Nature</b>       | Select the option of <i>Goods</i> or <i>Services</i> , which classifies the item for intransit reporting requirements between countries.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Item Group and Family</b> | These are categorizations for reporting or alternate search keys. Item groups can be used when you are defining transaction accounting rules, and item families can be used during cycle counting.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Demand Priority</b>       | If you are using PeopleSoft Supply Planning, this option enables you to group like items to establish a common priority for all items within a single group. The demand priorities can then be established for both planning applications. You define demand priority families by using the Demand Priority Family page.                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Cost Profile Group</b>    | <p>Assigning an item to a cost profile group determines the books that the item uses when accounting for the item. When you add this item to a business unit, the Define Business Unit Item - General: Costing page uses this field to determine the cost profile of the item within each book that the business unit uses.</p> <p>Be aware of these conditions:</p> <p>If the item is not serial controlled, the cost profile group that you assign to the item cannot be associated with any profiles that have serial ID as the deplete cost method or the cost flow.</p> <p>If the item is not lot controlled, the cost profile group that you assign to the item cannot be associated with any profiles that have lot ID as the deplete cost method or the cost flow.</p> |
| <b>Promise Option</b>        | <p>(Optional) Select a value:</p> <p><i>Perform ATP Reservations</i> (perform available-to-promise reservations): Select this option to enable customer service representatives who are using PeopleSoft Order Management to promise the item at the time of order, or to enable the Reserve Materials process (IN_FUL_RSV) in PeopleSoft Inventory to promise demand for the item based on anticipated supply.</p>                                                                                                                                                                                                                                                                                                                                                            |
|                              | <hr/> <p><b>Important!</b> To ensure accurate validation, you must complete item definition at the setID and business unit levels and specify non-soft-reservations processing for the item before you select the <i>Perform ATP Reservations</i> value. For step-by-step procedures for setting up ATP-reserved items, see Understanding ATP-Reservations.</p> <hr/>                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Create Product</b>        | Select if the enterprise uses product IDs, and you want the system to create a product ID when you save the item definition.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Use Item ID</b>           | Select to use the item ID as the product ID in PeopleSoft Order Management.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

|                                   |                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Product ID</b>                 | <p>If you do not select the Use Item ID option, you can enter a value in this field or, if you set up automatic numbering for products, you can enter a value of <i>NEXT</i>.</p> <p>These options are available only if PeopleSoft Order Management is installed and you are in Add mode or if you are updating an item that has a status of <i>Under Initialization</i>.</p> |
| <b>Item Image</b>                 | Click to access the Item Image page, where you can add, remove, or view a picture of the item.                                                                                                                                                                                                                                                                                 |
| <b>Manufacturers</b>              | Click to access the Manufacturer's Item page, where you can define information about the items' manufacturer.                                                                                                                                                                                                                                                                  |
| <b>Purchasing Item Attributes</b> | Click to access the Purchasing Attributes (ITM_TBL_PUR) component, where you can specify purchasing information for the item. You can access the Purchasing Attributes component only after the item is initially saved.                                                                                                                                                       |
| <b>Units of Measure</b>           | Click to access the Units of Measure (INV_ITEM_UOM) component, where you can assign additional UOMs to the item. You can access the Unit of Measure component only after the item is initially saved.                                                                                                                                                                          |

## See Also

[Chapter 3, "Defining Item Control Values," Defining Item Numbering, page 67](#)

[Chapter 2, "Working with Items," Designating Preferred Manufacturers, page 24](#)

[Chapter 2, "Working with Items," Managing Inventory by Item Status, page 6](#)

[Chapter 2, "Working with Items," Updating Item Status, page 10](#)

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Receiving and Putting Away Stock"

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Promising and Reserving Inventory," Understanding Reservations for Different Types of Items

*PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Defining Purchasing Item Information," Defining Purchasing Item Attributes

## Defining Additional Item Attributes

Access the Define Item - General: Classifications page.

|                                                           |                                                                                                                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Template ID</b>                                        | Select a value to use default values from an item template that you define on the Item Templates page. Selecting a value causes all of the template values to be supplied as this item's values, but you can override any attributes. |
| <b>Grade</b>                                              | The value in this field is the default on the Lot Control Information page when you create new lots. This field is informational only.                                                                                                |
| <b>Item Type</b>                                          | Select a value to define the functional group for this item. You can use this information as a search key for reports and inquiries. Establish item types on the Item Types page, which you access from the Define Controls menu.     |
| <b>Potency Code and UPC Code</b> (universal product code) | These fields are informational only.                                                                                                                                                                                                  |

|                          |                                                                                                                                                                                                                                                                   |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Stock Type</b>        | If the item is non-owned, select a value to identify the type of stock and the stock owner. The stock type is supplied to the business unit level and can be modified on the Define Business Unit Item - Inventory: Shipping/Handling page.                       |
| <b>Commodity Code</b>    | Select a value to use on bills of lading to group and identify products that are being shipped for freight rating and insurance purposes. Establish commodity codes, also known as freight classes, on the Commodity Code page under the Common Definitions menu. |
| <b>EU Commodity Code</b> | PeopleSoft Inventory uses this code for Intrastat Reporting purposes.                                                                                                                                                                                             |

### See Also

*PeopleSoft Enterprise Global Options and Reports 9.0 PeopleBook*, “Setting Up and Running Intrastat Reports”

## Defining Item Dimensions

Access the Define Item - General: Dimensions page.

|                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Length, Height, Width, Dimension UOM</b>   | The system uses dimension information on the Alternate Plan page for putaway and capacity checking if you enable capacity checking by volume for the business unit and storage locations.                                                                                                                                                                                                                                                                                                   |
| <b>Weight, Weight UOM, Volume, Volume UOM</b> | Indicate weight and volume values that the system uses when creating bills of lading and during load planning. The system uses these values if shipping and packing weights and volumes are not defined on the Define Business Unit Item - Inventory: Weight/Volume page. The system also uses weight and volume for capacity checking when you enable capacity checking for the business unit and storage locations. Base the weight and volume that you enter on the item's standard UOM. |

---

**Note.** When you change the weight and volume, recalculate capacity for the storage locations where you track capacity. For each item storage location, select the Calc capacity at save time (calculate capacity at save time) option on the Volume/Weight Capacity Checking page.

---

|                                 |                                      |
|---------------------------------|--------------------------------------|
| <b>Item Size and Item Color</b> | These fields are informational only. |
|---------------------------------|--------------------------------------|

### See Also

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Structuring Inventory,” Checking Storage Location Capacity

## Defining Material Usage Attributes

Access the Define Item - General: Usage page.

|                                                                                         |           |                                     |               |                                                                   |       |
|-----------------------------------------------------------------------------------------|-----------|-------------------------------------|---------------|-------------------------------------------------------------------|-------|
| <b>General</b>                                                                          | Inventory | Substitutes                         | Configuration | Custom                                                            | Audit |
| <a href="#">Common</a> <a href="#">Classifications</a> <a href="#">Dimensions</a> Usage |           |                                     |               |                                                                   |       |
| <b>SetID:</b>                                                                           | SHARE     | <b>Item ID:</b>                     | 10000         | <b>Standard Unit of Measure:</b> EA                               |       |
| Long Sleeve Biking Jersey, Men's                                                        |           |                                     |               |                                                                   |       |
| <b>*Usage Tracking:</b>                                                                 |           | None                                |               | <input type="checkbox"/> <b>Reconcile</b>                         |       |
| <b>Item Details</b> Find   View All First 1 of 1 Last                                   |           |                                     |               |                                                                   |       |
| <b>*Effective Date:</b>                                                                 |           | 04/15/2000                          |               | <input type="button" value="+"/> <input type="button" value="-"/> |       |
| <b>Charge Markup %:</b>                                                                 |           |                                     |               | <b>Currency Code:</b> <input type="text"/>                        |       |
| <b>Charge Markup Amt:</b>                                                               |           |                                     |               | <b>Service Price:</b> <input type="text"/>                        |       |
| <b>Charge Code:</b>                                                                     |           |                                     |               | <b>Service Exchange Amount:</b> <input type="text"/>              |       |
| <input type="checkbox"/> Reusable                                                       |           | <input type="checkbox"/> Disposable |               | <input type="checkbox"/> Recyclable                               |       |
| <input type="checkbox"/> Consumable                                                     |           | <input type="checkbox"/> Returnable |               | <input type="checkbox"/> Serviceable                              |       |

Define Item - General: Usage page

**Note.** The values that you enter on this page become default values on the Define Business Unit Item - General: Usage page.

### Usage Tracking

Select a method to track the item for billing or costing purposes.

**Note.** The process for collecting this information and communicating it to the third-party billing system is the same for each value. The difference is in the methodology that the third-party system uses when billing the consumer.

Values are:

*Billing:* Tracks the usage of the item for billing. This method compiles consumer usage information to bill the consumer directly for items that are used.

*Costing:* Tracks the usage of the item for cost accounting. This method compiles the consumer usage information to set the cost of a procedure accurately. After the cost is set, you can determine the charge for that procedure. Over time, monitor procedure costs to ensure that the procedure price remains competitive and covers actual costs.

### Reconcile

Select to include the item in the material usage reconciliation of its par location. You can reconcile only items that are tracked for billing or costing. You must set up reconciled items that are replenished to their par location (the Not Replenished check box is clear on the Define Par Location Groups page and Define Par Location - Line page) with a replenishment control selection of *Par* or *Min/Max* on the Define Par Location - Line page.

**Charge Markup %** (charge markup percentage) and **Charge Markup Amt** (charge markup amount)

Enter the markup percentage and flat markup on the item. The system applies the markup to the cost of the item.

### Charge Code

The charge code is for informational purposes only. Use this code to assist in consumer billing. Set up this internal code on the Charge Codes page.

|                                                                                 |                                                                                                                                |
|---------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| <b>Currency Code</b>                                                            | Enter the currency code that represents the values in the Service Price and Service Exchange Amount fields.                    |
| <b>Service Price and Service Exchange Amount</b>                                | Enter the service part price and the part exchange price. These values are used with PeopleSoft Customer Relations Management. |
| <b>Reusable, Disposable, Recyclable, Consumable, Returnable, or Serviceable</b> | Select for reporting and inquiry purposes only.                                                                                |

## See Also

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Tracking Material Usage,” Reconciling Material Usage with Receipts

## Establishing Item Tracking and Lot-Control Attributes

Access the Define Item - Inventory: Tracking/Description page.

The screenshot displays the 'Define Item - Inventory: Tracking/Description' page. At the top, there are tabs for 'General', 'Inventory', 'Substitutes', 'Configuration', 'Custom', and 'Audit'. The 'Inventory' tab is selected. Below the tabs, the 'Tracking/Description' section shows 'SetID: SHARE' and 'Item ID: 10000'. The 'Standard Unit of Measure' is 'EA'. The 'Item Description' is 'Long Sleeve Biking Jersey, Men's'. The 'Item Tracking' section contains several checkboxes: 'Lot Control', 'Serial Control', 'Shipping Serial Control', 'Staged Date Control', 'Serial in Production', and 'Device Tracking'. A 'Trace Usage' dropdown menu is set to 'None'. The 'Item Details' section includes a date field for 'Effective Date' (04/15/2000), a text area for 'Long Description', and a numeric field for 'Shelf Life (Days)' (0). A sub-section titled 'Lot Control' contains fields for 'Availability Lead Time (Days)' (0), 'Retest Lead Time (Days)' (0), and a 'Lot Status' dropdown menu.

Define Item - Inventory: Tracking/Description page

The values for Lot Control, Serial Control, and Ship Serial Control are entered as default values from the Item Default Values page.

**Warning!** After lot, serial, ship-serial, and stage-date control flags are set and you begin to put stock away, these fields are unavailable for entry—you cannot modify them.

## Lot Control

Select to indicate that a quantity of inventory items is produced as a group or otherwise collected into an identifiable unit. Lots often represent production runs. For lot-controlled items, the lot ID is entered at the time of receipt and putaway and for inventory movement transactions. A default filler value for lot ID is entered on the Installation Options - Inventory page and is used by items that are not lot controlled.

**Serial Control**

Select to indicate that a unique identifier is assigned to each item that is in stock. The system manages serial-controlled inventory items in units of one, based on the standard UOM. For serial-controlled items, enter the serial ID at the time of receipt and putaway and for all inventory movement transactions. A default filler value for serial number is entered on the Installation Options - Inventory page and is used by items that are not serial controlled.

**Shipping Serial Control**

Select to indicate that serial tracking is required only at the time of shipment. You move ship-serial items through the warehouse without entering serial information into the system, which simplifies transaction processing and entry. You assign serial numbers when the item is shipped, which provides serial tracking on products that are shipped to customers, internal locations, and other inventory business units.

**Trace Usage**

Select the *Serial* value to track the components of this assembly.

If existing inventory transactions have occurred, you will receive a warning message that future genealogy tracking will be affected but the change will be allowed.

This option is used for component items and enables you to associate the component's serial ID or lot ID with a higher-level assembly item whose Serial in Production option is equal to *Yes*.

Values are:

*Serial*: Select to enable this component's serial ID to be tracked in a higher level assembly whose Serial in Production option is selected. If the component's Lot Control option is selected, then both the serial ID and lot ID will be tracked.

*Lot*: Select to enable this component's lot ID to be tracked in a higher level assembly whose serial in production option is *Yes*.

*None*: Select if you do not want to track this item.

Similar to serial in production, trace usage can be used in conjunction with the Serial Control option. If the Serial Control option is selected, then the serial ID will be identified in inventory, and this serial ID remains with the item throughout the entire manufacturing process. If Serial Control is cleared, then serial ID will not be identified in inventory, but a serial ID will be specified when the item is associated with a serial assembly. This allows tracking the genealogy without requiring the need to track the serial ID in inventory.

---

**Important!** The source code for serial-controlled items must be Make or Buy.

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See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Understanding PeopleSoft Manufacturing".

**Staged Date Control**

Select to indicate that the system tracks an item by the date that it is staged into inventory. This check box is available when you select the Staged Date Control check box on the Installation Options - Inventory page. If it is selected, it is used as a default for the setID/item, but you can override it. If the item is not tracked by its staging date, the staged date fields do not appear on any of the item transaction pages. The stage date is used as the default for the business unit-item level, which is the level that the system uses to determine staged-dated tracking. For stage date-controlled items,

you must enter the stage date at the time of receipt and putaway and for all inventory movement transactions.

### Serial in Production

Select this option if you want to track the key serial and lot components that make up this assembly item. You will assign a serial ID to the item during the manufacturing process. You will also identify serial and lot components that are used to produce this item.

This field can be used with and without the serial control option. If you do select serial control, then you will enter the serial ID for all material movement transactions. If you do not select the serial control option, then the system tracks the serial ID during the production process. This means that you assign a serial ID to the item during production and associate serial and lot components with this serial assembly. During completions, you will complete the serial ID to inventory.

---

**Note.** If you select serial in production and not serial control, during subsequent inventory movements of this item, you will not need to enter the serial ID.

---

### Device Tracking

Select to provide PeopleSoft Purchasing with item visibility throughout the procurement cycle.

### Shelf Life (Days)

Enter the number of days that the item can remain in inventory before it is no longer usable.

### Availability Lead Time (Days) and Retest Lead Time (Days)

Enter values for lot-controlled items. The availability lead time is the number of days between the lot's creation date and the date that it becomes available; the retest lead time is the number of days between a lot's creation date and the date that it needs to be retested.

### Lot Status

Select a default value to assign to newly created lots for lot-controlled items. You can update lot status at any time on the Lot Control Information page. Values are:

*Hold:* Prevents material transactions for the item-lot combination temporarily.

*Open:* Enables regular processing of the lot. You cannot change an *Open* lot status if quantity for the item-lot combination is allocated to a demand line.

*Rejected:* Prevents material transactions for the item-lot combination.

*Restricted:* Provides a warning message when you use the lot in an inventory transaction.

---

**Note.** Because hold, rejected, and restricted lots are not available for picking plans or for lot allocations, their available quantity is 0. You can, however, use restricted lots in picking transactions on the Picking Feedback page.

---



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**Note.** The shelf life, availability lead time, and retest lead time are default values for the business unit level. You can modify these values on the Define Business Unit Item - Inventory: Shipping/Handling page.

---

## See Also

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Managing Item Lots”

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Preparing to Implement PeopleSoft Inventory”

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Managing Inventory Status”

*PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Understanding PeopleSoft Manufacturing,” Serial Genealogy

## Establishing Item Shipping and Handling Attributes

Access the Define Item - Inventory: Shipping/Handling page.

|                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Storage Rule</b>                            | Select a rule that will appear on both the Putaway Plan and on the Review Plan.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>MSDS ID</b> (material safety data sheet ID) | Select the appropriate ID, for informational purposes, if the item requires one. Establish MSDS IDs on the MSDS Identifiers page.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Storage Temp, Storage Humidity</b>          | These fields are informational only.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Max Capacity</b> (maximum capacity)         | Enter the maximum capacity at which this inventory item can be stored in a designated material storage bin. Track maximum capacity when storage locations in an inventory business unit are assigned exclusively to particular inventory items. This field reflects the standard UOM and is informational only.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Packing Code</b>                            | Select a value. Establish packing codes on the Packing Codes page, which you access from the Define Controls menu.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Ship Via</b>                                | <p>Select a shipping code. Establish shipping codes on the Ship Via Codes page under the Common Definitions menu.</p> <p>The value that you select appears by default for the business unit; you can modify it on the Define Business Unit Item - Inventory: Shipping/Handling page. The ship via value for the item at the business unit level appears by default on the order line when you enter a request for this item by using the Create/Update Stock Request (EZ_ISSUE_INV_GBL) component.</p> <p>The default hierarchy for the ship via value depends on the type of order that you create.</p> <p>The hierarchy for an outbound sales order is:</p> <ol style="list-style-type: none"> <li>1. Load ID (if assigned).</li> <li>2. Inventory item ID.</li> <li>3. Contract.</li> <li>4. Ship to customer.</li> <li>5. Order group.</li> </ol> <p>The hierarchy for an outbound material stock request is:</p> <ol style="list-style-type: none"> <li>1. Load ID (if assigned).</li> <li>2. Inventory item ID.</li> </ol> |

### 3. Customer.

The hierarchy for an Interunit transfer is:

1. Transfer attributes by item.
2. Transfer attributes by business unit.

The hierarchy for an inbound purchase order is:

1. Vendor.
2. Business unit options.

#### **Tariff Cd** (tariff code)

Select the harmonized tariff code for the item. Establish harmonized tariff codes on the Harmonized Tariff Code page under the Common Definitions menu.

Various documents that accompany shipments across international borders require harmonized tariff codes. Customs officials use these codes to determine duty on shipped commodities. The system uses this information on export bills of lading for export sales orders that are defined in PeopleSoft Order Management or export intercompany transfers in PeopleSoft Inventory.

## Defining Configuration Attributes for an Item

Access the Define Item - Configuration page.

General Inventory Substitutes **Configuration** Custom Audit

**SetID:** SHARE **Item ID:** LT5010 **Standard Unit of Measure:** EA

Custom Road Bicycle

**Configuration**

☒ **Distribution Configuration**  
**Distribution Model:** LT5010\_TREE

☒ **Production Configuration**  
**Production Model:** LT5010\_PRDN\_TREE

☒ **Configuration Code Generation**  
**Template:** LT5010\_TMP Custom Bike Template

☒ **Default Configured Lot**

☒ **Configuration Costing**

Define Item - Configuration page

**Distribution Configuration** Select to enable distribution configuration processing, which enables the system to capture dynamic option and pricing information.

**Distribution Model** If you select Distribution Configuration, the system uses the model to select the configuration rules that are used to configure this item.

**Production Configuration** Select to enable production configuration processing, which enables the system to:

|                                      |                                                                                                                                                                                                                                                                                          |
|--------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                      | <ul style="list-style-type: none"> <li>• Perform routing operations and component generation for manufacturing configured items.</li> <li>• Generate a production cost if the item's cost is determined by the configuration.</li> </ul>                                                 |
| <b>Production Model</b>              | If you select Production Configuration, the system uses the model to select the configuration rules that are used to configure this item.                                                                                                                                                |
| <b>Configuration Code Generation</b> | Select to indicate that the configuration template will be used to generate a configuration code. This option is valid only for lot controlled items that have distribution configuration.                                                                                               |
| <b>Template</b>                      | Select a template for configuration code generation. The system creates configuration codes based on the template that you select. You cannot change an item to use configuration codes if system activity exists for the item (such as inventory balances, customer orders, and so on). |
| <b>Default Configured Lot</b>        | Select to indicate that the default value is the last lot with the same configuration code (during receipts and issues). This check box is available when you select Configuration Code Generation.                                                                                      |
| <b>Configuration Costing</b>         | Select to generate costs for each unique configuration code during production order creation. Also, you can recalculate the cost of a configured item to reflect cost changes in standard items. This check box is available when you select Configuration Code Generation.              |

### See Also

*PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, “Working With Configuration Codes,” Setting Up Automatic Configuration Code Generation

*PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, “Using PeopleSoft Enterprise Product Configurator,” Establishing Configured Production Costs

---

## Approving Item Definitions

This section discusses how to approve item definitions.

### Understanding how to Approve Item Definitions

For maximum control over the item master, the system enables you to require that authorized staff members approve item definitions before the items become available for transactions.

To set up and use manual item approval processing:

1. Select the Item Approval Required option on the Installation Options - Overall/GL page.
2. Specify an item approval method:
  - Manual: Authorized staff can approve or deny item definitions for a setID on the Item Approval page.
  - Workflow: You must establish item approval as a business process in PeopleSoft Workflow.
3. Change the current status of the item from *Under Initialization* to *Pending Approval* on the Define Item - General: Common page when you add item definitions at the setID level.

Changing the status makes the item definition available for approval on the Item Approval page or triggers the item approval workflow.

4. The system sends a worklist entry for each item definition with an item status of *Pending Approval* to an authorized staff member.

The worklist entry for item approval transfers the authorized staff member to the Item Approval page.

5. The authorized person approves or denies the item definition on the Item Approval page.

Until an authorized person approves an item definition on the Item Approval page, you can't modify the item definition at the setID level. However, for items with a *Pending Approval* status, you can define purchasing information by using the Purchasing Attributes component and define item attributes at the business unit level by using the Define Business Unit Item (GEN\_ATTRIB\_INV\_GBL) component.

Before an item is approved, the only valid statuses on the Define Item - General: Common page are: *Under Initialization* and *Pending Approval*. In environments that don't require item approval processing, items with a *Pending Approval* status are updated to *Active* status.

In item-approval environments, the current item status is updated from *Pending Approval* to *Active* when an authorized person approves the item definition on the Item Approval page. After the person approves the item, you cannot change the item's approval status, and approved items are no longer available on the Item Approval page. Also, *Under Initialization*, *Pending Approval*, and *Denied Approval* are no longer valid item statuses on the Define Item - General: Common page. You can select only the *Active*, *Hold*, or *Discontinue* statuses.

## The Effects of Status Change on the Item

Status changes at the setID level affect the status at the business unit level:

- If the item has a status of *Under Initialization* at the setID level, the definition for the item at the business unit level can have only the status of *Under Initialization*.
- If the status of the item at the setID level changes from *Under Initialization* to *Pending Approval*, all of the definitions for the item at the business unit level are updated to *Pending Approval* status.
- If the status of the item at the setID level changes from *Pending Approval* to *Active*, all the definitions for the item at the business unit level are updated to *Active* status.
- If you change the status of the item at the setID level back to *Under Initialization*, then all the definitions for the item at the business unit level are updated to *Under Initialization*.

## See Also

[Appendix A, "Delivered Workflow for PeopleSoft Managing Items," page 167](#)

[Chapter 2, "Working with Items," Managing Inventory by Item Status, page 6](#)

## Page Used to Approve Item Definitions

| Page Name     | Object Name       | Navigation                                                      | Usage                                                        |
|---------------|-------------------|-----------------------------------------------------------------|--------------------------------------------------------------|
| Item Approval | INV_ITEM_APPROVAL | Items, Define Items and Attributes, Approve Item, Item Approval | Approve item definitions that you create at the setID level. |

## Approving Item Definitions

Access the Item Approval page.

To approve items, use the Item Approval (ITEM\_APPROVAL) component.

**Item Definition Approved**

Select a value:

*Approved:* Approves the item when you save the page. This is the status default value.

*Denied:* Denies the item so that it is not available for transactions, but you can view it by using the Review Item Information menu.

---

**Note.** For items with a status of *Denied* or *Pending Approval*, you can change the status back to *Under Init*(under initialization). When you do, the status of the item definition at the setID and business unit levels changes back to *Under Initialization*.

---

---

## Associating an Item with a UOM

This section discusses how to:

- Assign a UOM to an item.
- Assign a global trade item number (GTIN) to an item and UOM combination.

## Understanding how to Associate an Item with a UOM

When you create an item in the Define Item component, you define a standard UOM (unit of measure) for the item. Depending upon the business needs, you may want to define additional units of measure for transactions involving this item. For example, if you order an item by the case but ship it in individual units, you will want two additional UOMs: a shipping UOM (each) and an ordering UOM (case).

When multiple UOMs apply to a given item, PeopleSoft applications maintain conversion rates to facilitate processing.

### See Also

Chapter 2, “Working with Items,” Using Item Quantity UOM, page 28

## Pages Used to Associate an Item with a UOM

| Page Name                 | Object Name     | Navigation                                                            | Usage                                                                                                                                                                                                             |
|---------------------------|-----------------|-----------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Units of Measure          | INV_ITEM_UOM    | Items, Define Items and Attributes, Units of Measure                  | Assign a UOM to an item. For each item-UOM combination that you define, specify quantity precision and rounding rules for use in system calculation.                                                              |
| UOM Weight/Volume         | INV_ITEM_WTVOL  | Click the UOM Weight/Volume link on the Units of Measure page.        | Assign default packing codes and stocking and shipping physical measurements to an item-UOM combination.                                                                                                          |
| Global Trade Item Numbers | ITM_MFG_GTIN_SP | Click the Global Trade Item Number link on the Units of Measure page. | Assign a GTIN to an item and UOM combination using a locally owned EAN/UCC Company Prefix (manufacturer).<br><br>See <a href="#">Chapter 2, “Working with Items,” Defining Universal Item ID Types, page 23</a> . |

## Assigning a UOM to an Item

Access the Units of Measure page.

To define the available units of measure for an item, use the Units of Measure (INV\_ITEM\_UOM) component. Use the Units of Measure (INV\_ITEM\_UOM\_CI) component interface to load data into the tables for this component.

### Units of Measure

**SetID:** SHARE **Item ID:** 10000  
Long Sleeve Biking Jersey, Men's

**Convert To**

**Standard Unit of Measure:** EA Each

**Convert From** Find | View All First 1 of 3 Last

**\*Unit of Measure:** BOX Box

**\*Conversion Rate:** 4.00000000

**\*Quantity Precision:** Whole Nbr

☐ Default Stocking UOM ☐ Default Req UOM

**Rounding Rule**

☒ Natural Round ☐ Round Up

**Unit of Measure Type** Find | View All First 1-3 of 3 Last

| Unit of Measure Type |     |
|----------------------|-----|
| Ordering             | + - |
| Shipping             | + - |
| Stocking             | + - |

[UOM Weight/Volume](#) [Global Trade Item Number](#)

Units of Measure page

**Conversion Rate**

Enter conversion rates that conform to the quantity precision rule for an item-UOM combination. For example, if an item's standard UOM is defined as a whole number, you cannot enter a conversion rate that contains a decimal value.

**Quantity Precision**

The rule that is to be used for this item-UOM combination.

---

**Note.** Because serial-controlled items are by definition whole numbers, they can have only whole number quantity precision.

---

**Default Stocking UOM**  
(default stocking unit of measure)

If the item is a serial controlled item, the default stocking UOM is defined as the standard UOM, and you cannot change it. The default stocking UOM is used as a default on the PO Receiving, Inspection, Express Putaway, Manual Staging, and RMA & InterUnit Receiving pages.

**Default Req UOM**(default requisition unit of measure)

Select to indicate that the UOM should be displayed by default for the requester. If not selected, the item vendor UOM or the standard UOM is displayed by default for the requester.

**Unit of Measure Type**

Indicate which transactions use the selected UOM. You must select at least one of these UOM types for each item:

*Ordering:* The UOM is used for stock requests. The ordering UOM is also used by PeopleSoft Order Management.

*Shipping:* The UOM is used for express issue and shipping/issues transactions.

*Stocking:* The UOM is used for any putaway or receiving transaction. This UOM can also be used for numerous other transactions, including transfers, container management, adjustments, picking, and physical accounting.

**See Also**

[Chapter 2, “Working with Items,” Using Item Quantity UOM, page 28](#)

[Chapter 2, “Working with Items,” Establishing Quantity Precision and Rounding Rules for Items, page 35](#)

**Assigning a GTIN to an Item and UOM Combination**

Access the Global Trade Item Numbers page.

To access this page, a universal item ID type of GTIN must be defined.

1. Select the locally owned manufacturer code.
2. Enter the GTIN for the unit of measure.

The GTIN must be 8, 12, 13, or 14 numeric digits. Only one GTIN can be assigned, using a locally owned manufacturer, for each item-UOM combination.

3. Click the OK button.

The PeopleSoft application displays the Units of Measure page.

4. Save the changes.

**See Also**

[Chapter 2, “Working with Items,” Using Universal Item Identifiers, page 21](#)

---

## Copying Items

This section discusses how to:

- Copy item information.
- Copy setID item status to a business unit.

### Understanding how to Copy Items

To maximize consistency and efficiency in the item definition process, PeopleSoft Inventory enables you to copy item definitions from the setID level to the business unit level and between business units by using the Copy Item page. You can also copy the item status from the setID to any of the business units where you define the item, or you can copy the substitution definition to the business unit level.

## Pages Used to Copy Items

| Page Name                         | Object Name       | Navigation                                                                  | Usage                                                                                                                                             |
|-----------------------------------|-------------------|-----------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| Copy Item                         | ITEM_COPY_INV     | Items, Define Items and Attributes, Copy Item                               | Copy item information within the same setID, copy item attributes within the same business unit, and copy item attributes between business units. |
| Copy SetID to BU Item Status      | INV_ITM_STATUS_SP | Click the Copy Item Status link on the Define Item - General: Common page.  | Copy the item status that you modify for the setID to any of the business units where the item is defined.                                        |
| Copy SetID to BU Substitute Items | INV_SETID_BU_SP   | Click the Copy to Business Unit link on the Define Item - Substitutes page. | Copy the substitution definition of an item at the setID level to the business unit level.                                                        |

## Copying Item Information

Access the Copy Item page.

### Copy Item

**Select Copy Option**

☒ Copy Item Within SetID
 ☐ Copy Business Unit Attributes
 ☐ Create Product
 ☐ Copy Substitutes

☐ Copy Attributes Within Unit
 \*Business Unit Selection: 
☐ Copy VAT Attributes

☐ Copy Attributes Across Unit

SetID: 
Target Eff Date:

Source Unit:

Source Item ID: 
Target Item ID:

Description:

Product ID:

Copy Item page

### Copy Item Within SetID

If you select this option, you can also copy the purchasing and inventory business unit attributes that are established for the item by selecting the Copy Business Unit Attributes option.

### Copy Business Unit Attributes

The Inventory Business Units and the Purchasing Business Units group boxes at the bottom of the page display the business units that have established the item ID. By default, all business units are selected. Clear those business units with attributes that you do not want to copy to the target item. When you are copying from inventory business units, planning attributes at the business unit level are copied along with weight and volume attributes and configuration attributes. Values that are calculated through the replenishment process are not copied. However, other replenishment attributes (set up attributes, for example) are copied.

When you are copying items within the same business unit, the VMI customer ship to attributes are copied. If the business unit that is being copied to is a VMI business unit, only inventory items can be copied.

---

**Note.** If you copy items between business units with different currencies, you must change all cost and price fields for the item manually.

---

#### Source Item ID

If the item that is being copied still has a status of *Under Initialization*, then the target item is also placed in *Under Initialization* status. If the item that is being copied has a status of *Approved*, *Hold*, *Discontinue*, or *Inactive*, and item approval is not required, then the item is placed in *Active* status. If item approval is required, the item is placed in *Under Initialization* status.

#### See Also

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Using Vendor Managed Inventory,” Setting Up Vendor Managed Inventory

## Copying SetID Item Status to a Business Unit

All business units for which the item is defined appear. For each business unit, the system also displays the current status date, current item status, future status date, and future item status.

To copy the item status definition from the setID to a business unit, select the business unit’s row, and then click OK. The setID’s item status definition replaces the item status definition at the business unit level.

---

## Substituting Items

This section discusses how to:

- Establish a substitution definition for an item.
- Copy an item’s substitution definition.

## Understanding how to Substitute Items

A substitution definition for an item must be established for a setID on the Define Item - Substitutes page before it can be modified for the business unit on the Define Business Unit Item - Substitutes page. You cannot add substitute items to substitution definitions at the business unit level unless they are defined for the setID. At the business unit level, you can only remove substitute items from the substitution definition or modify their attributes.

Substitute items must be unique for the item. You can’t enter the same item twice with different dates. For example, Substitute A with effective dates from January 1, 1999 to February 1, 1999 and Substitute A with effective dates from February 1, 2000 to August 30, 2000 cannot be substitutes for the same item. In this case, you need to define a different substitute for the second set of effective dates.

If you use PeopleSoft Manufacturing, you must maintain substitute item data at the business unit level and at the BOM level for all component items for which substitutions are allowed. You can also use substitute items in conjunction with discontinued items. As you phase out one item and drive its current quantity on hand to 0, you can define its replacement component as a substitute. In this way, when no quantity is on hand to meet demand of the phased-out item, the substitute is recommended instead. A substitute item cannot be a phantom or a component of a phantom. In addition, where substitutes exist, the item cannot be changed to a phantom.

## Pages Used to Substitute Items

| Page Name                               | Object Name        | Navigation                                                                                                             | Usage                                                                                                                                                                                                                                            |
|-----------------------------------------|--------------------|------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Define Item - Substitutes               | INV_ITEMS_DEFIN7   | Items, Review Item Information, Items, Substitutes<br><br>Items, Define Items and Attributes, Define Item, Substitutes | Establish a substitution definition for an item. An item substitution definition specifies alternate items that may be used in PeopleSoft Inventory, Purchasing, or Manufacturing when sufficient quantity of the requested item is unavailable. |
| Copy SetID to BU Substitute Items       | INV_SETID_BU_SP    | Click the Copy to Business Unit link on the Define Item - Substitutes page.                                            | Copy an item's substitution definition at the setID level to the business unit level.                                                                                                                                                            |
| Business Unit Substitute Items          | INV_SUB_ATTRIB_SEC | Click the View Current button on the Copy SetID to BU Substitute Items page.                                           | View the business unit's current substitution definition for an item before copying the item's substitution definition from the setID.                                                                                                           |
| Define Business Unit Item - Substitutes | SUBS_ATTRIB_INV    | Items, Define Items and Attributes, Define Business Unit Item, Substitutes                                             | Modify the substitution definition that is established for the item at the setID level to meet the requirements of the business unit.                                                                                                            |
| Copy Set ID Substitute Items            | INV_SUB_ITEM_SEC   | Click the Copy SetID Substitutes link on the Define Business Unit Item - Substitutes page.                             | View and copy (if available) the substitution definition for the item at the setID level.                                                                                                                                                        |

## Establishing a Substitution Definition for an Item

Access the Define Item - Substitutes page

|         |           |                    |               |        |       |
|---------|-----------|--------------------|---------------|--------|-------|
| General | Inventory | <b>Substitutes</b> | Configuration | Custom | Audit |
|---------|-----------|--------------------|---------------|--------|-------|

**SetID:** SHARE      **Item ID:** GR8000      **Standard Unit of Measure:** EA  
 Gear, Sugishita

| Substitute Item Details |           |               |            |            |                 |     |
|-------------------------|-----------|---------------|------------|------------|-----------------|-----|
| Substitute Item         |           | Usage         |            |            |                 |     |
| *Priority               | *Sub Item | Description   | Start Date | *End Date  | Conversion Rate | Sta |
| 1                       | GR8001    | Gear, Campani | 01/01/2000 | 12/31/2099 | 1.00000000      | EA  |

[Copy to Business Unit](#)

Define Item – Substitutes page

## Substitute Item

### Priority

The substitute item with the highest priority (the lowest number) is substituted first. Priority doesn't need to be sequential, though it must be greater than zero. PeopleSoft applications display, print, and suggest substitute options in priority order.

### Start Date, and End Date

Determines the date range for substitution validity. The current date appears by default as the start date, and December 31, 2099 appears as the default end date. You can change both dates.

### Conversion Rate

Indicates the quantity of the substitute item that is required to replace the original item. The default value is 1, but you can modify the value as necessary. Conversion rates are calculated by using the standard UOM.

### Copy to Business Unit

After you finish defining substitution options for the item, click this link to access the Copy SetID to BU Substitute Items page, where you can copy the setID's substitution definition to selected business units.

## Usage

### Use for Shipments

Indicates whether the substitute item is valid for material stock requests and sales orders during the picking process.

### Use for Manufacturing

Indicates whether the substitute item can be used for substitutions on BOMs or production picking plans.

### Use for Procurement

Indicates whether the substitute item can be used during online sourcing in PeopleSoft Purchasing.

---

**Note.** PeopleSoft Purchasing uses the substitution definition from only the setID level.

---

**See Also**

*PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Understanding PeopleSoft Manufacturing,” Item Substitution

**Copying an Item’s Substitution Definition**

To copy the substitution definition for the item from the setID to a business unit, select the business unit’s row, and then click OK. If a substitution definition for the item exists for the business unit, the system replaces it with the setID’s substitution definition for the item.

## CHAPTER 5

# Defining Items by Business Unit

This chapter discusses how to:

- Define items at the business unit level.
- Assign serial numbers automatically.

---

## Defining Items at the Business Unit Level

Before processing an inventory item in a PeopleSoft application, you must define the item within the system. Items are defined at the setID level first; then they are defined at the business unit level.

This section discusses how to:

- Define basic attributes for a business unit.
- Define item cost profiles.
- Define item usage attributes.
- Define item export information.
- Define customer ship to attributes for vendor managed inventory (VMI).
- Define shipping and handling item attributes.
- Associate an item with putaway and picking zones.
- Define item replenishment attributes.
- Define item weight and volume information.
- Define item utilization types.
- Define manufacturing information for an item.
- Set up item replenishment defaults.
- Specify planning information for an item.
- Define generation of item supply information.
- Define item forecast parameters.
- Define planning order modifiers.
- Define business unit attributes for configured items.

## Understanding how to Define Items by Business Unit

To specify item attributes at the business unit level, use the Define Business Unit Item (ITEM\_ATTRIBUTE) component. Inventory items are defined at the setID level and can be shared among all of the business units. However, some item information (such as rules for replenishment, planning, and physical accounting) may vary depending on which business unit the item is in. These are the types of item attributes to define at the business unit level.

**Note.** For non-inventory items, the only field values that you can override at the business unit level are Source Code (on the Define Business Unit Item - Manufacturing: General page), Explode Demand for Consumption, and Forecast Fulfillment Size (on the Define Business Unit Item - Planning: Forecast/Incremental page).

## Pages Used to Define Items for the Business Unit

| Page Name                                                | Object Name      | Navigation                                                                                                            | Usage                                                                                                                                                                                                                                               |
|----------------------------------------------------------|------------------|-----------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Define Business Unit Item - General: Common              | GEN_ATTRIB_INV   | Items, Define Items and Attributes, Define Business Unit Item, General                                                | Define basic business unit item attributes such as the item's cost element and current purchase cost, at the business unit level.                                                                                                                   |
| Define Business Unit Item - General: Costing             | CM_ITEM_METHOD   | Items, Define Items and Attributes, Define Business Unit Item, General<br>Select the Costing link.                    | Define item cost profiles of an item that is being added to a business unit in each of the books that the business unit uses.                                                                                                                       |
| Define Business Unit Item - General: Usage               | MATRL_USG_ATTRIB | Items, Define Items and Attributes, Define Business Unit Item, General<br>Select the Usage link.                      | Define item usage attributes for an item at the business unit level.                                                                                                                                                                                |
| Define Business Unit Item - General: Export Information  | GEN_ATTRIB_EXP   | Items, Define Items and Attributes, Define Business Unit Item, General<br>Select the Export Information link.         | Define item export information by specifying values that are used in export documentation that is generated for the business unit.                                                                                                                  |
| VMI Item Ship To Customers                               | IN_VMI_BU_ITEMS  | Items, Define Items and Attributes, Define Business Unit Item, General<br>Select the VMI Item Ship To Customers link. | Define customer ship to attributes for VMI items by selecting the ship to customers that are vendor managed by your organization for this item.<br><br><i>See PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Using Vendor Managed Inventory".</i> |
| Define Business Unit Item - Inventory: Shipping/Handling | OVRD_ATTRIB_INV  | Items, Define Items and Attributes, Define Business Unit Item, Inventory                                              | Define item attributes for shipping and handling for the business unit.                                                                                                                                                                             |

| Page Name                                                    | Object Name       | Navigation                                                                                                                           | Usage                                                                                                                                                                                                                                                      |
|--------------------------------------------------------------|-------------------|--------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Item Zone Assignments                                        | ZONE_ATTRIB_INV   | Click the Assign Item to Zones link on the Define Business Unit Item - Inventory: Shipping/Handling page                             | Associate an item with putaway and picking zones in the business unit. Zone assignment is optional; however, it enables much tighter control over the putaway and picking operations.                                                                      |
| Define Business Unit Item - Inventory: Replenishment         | REPLEN_ATTRIB_INV | Items, Define Items and Attributes, Define Business Unit Item, Inventory<br>Inventory, Replenish Inventory, Setup Item Replenishment | Define item replenishment attributes for use in the automated replenishment routines of a particular business unit.                                                                                                                                        |
| Define Business Unit Item - Inventory: Weight/Volume         | WTVOL_ATTRIB_INV  | Items, Define Items and Attributes, Define Business Unit Item, Inventory                                                             | Define item information for weight and volume at the business unit level.                                                                                                                                                                                  |
| Define Business Unit Item - Inventory: Utilization Types     | COUNT_ATTRIB_INV  | Items, Define Items and Attributes, Define Business Unit Item, Inventory                                                             | Define item types and groups for an item at the business unit level.                                                                                                                                                                                       |
| Define Business Unit Item - Manufacturing: General           | MFG_ATTRIB        | Items, Define Items and Attributes, Define Business Unit Item, Manufacturing                                                         | Define manufacturing information for an item by determining default production and bill of material (BOM) information if the installation includes PeopleSoft Manufacturing.                                                                               |
| Define Business Unit Item - Manufacturing: WIP Replenishment | MFG_ATTRIB2       | Items, Define Items and Attributes, Define Business Unit Item, Manufacturing                                                         | Set up item replenishment defaults, if you use PeopleSoft Manufacturing. This is required for PeopleSoft Flow Production. Also, set up default values if you use replenishment as the component issue method and you don't use PeopleSoft Flow Production. |
| Define Business Unit Item - Planning: General                | PL_ATTRIB_INV     | Items, Define Items and Attributes, Define Business Unit Item, Planning                                                              | Specify Planning information for an item.                                                                                                                                                                                                                  |
| Define Business Unit Item - Planning: Fences/Lead Time       | PL_ATTRIB_INV2    | Items, Define Items and Attributes, Define Business Unit Item, Planning                                                              | Define how to generate item supply by determining the planning time, planning message parameters, safety stock and excess stock parameters, and other general information regarding how you generate supply for inventory items.                           |

| Page Name                                             | Object Name        | Navigation                                                                   | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-------------------------------------------------------|--------------------|------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Define Business Unit Item - Planning: Forecast        | PL_ATTRIB_INV3     | Items, Define Items and Attributes, Define Business Unit Item, Planning      | Define forecast parameters by determining the parameters to control forecast consumption and incremental material supply and consumption.                                                                                                                                                                                                                                                                                                                              |
| Define Business Unit Item - Planning: Order Modifiers | PL_ATTRIB_INV4     | Items, Define Items and Attributes, Define Business Unit Item, Planning      | Define order modifiers for planning by determining planned transfer, purchase, and order quantity default values for a manufactured item. PeopleSoft Supply Planning use these values when creating planning models. When planning transfers between business units, purchases from suppliers, or the production of items using PeopleSoft Manufacturing, consider defining modifiers to set up guidelines when creating planned supply in PeopleSoft Supply Planning. |
| Define Business Unit Item - Configuration             | CONFIG_ATTR_PNL    | Items, Define Items and Attributes, Define Business Unit Item, Configuration | Define business unit attributes for configured items if you use PeopleSoft Product Configurator.                                                                                                                                                                                                                                                                                                                                                                       |
| Define Business Unit Item - Custom: Character         | ITEM_ATTR_CHAR_PNL | Items, Define Items and Attributes, Define Business Unit Item, Custom        | Define alphanumeric field values at the business unit level for item attributes that are unique to the enterprise.<br><br>Values that you define for the setID on the Define Item - Custom: Character page appear by default on this page, but you can modify them for the business unit.                                                                                                                                                                              |
| Define Business Unit Item - Custom: Numeric           | ITEM_ATTR_NUMB_PNL | Items, Define Items and Attributes, Define Business Unit Item, Custom        | Define numeric field values at the business unit level for item attributes that are unique to the enterprise.<br><br>Values that you define for the set ID on the Define Item - Custom: Numeric page appear by default on this page, but you can modify them for the business unit.                                                                                                                                                                                    |
| Business Unit Item Links                              | INV_BU_ITEM_LINKS  | Items, Define Items and Attributes, Business Unit Item Links                 | Access all the pages that are related to the business process of defining an item for a business unit.                                                                                                                                                                                                                                                                                                                                                                 |

## Defining Basic Business Unit Item Attributes

Access the Define Business Unit Item - General: Common page.

|                |           |             |               |          |               |        |
|----------------|-----------|-------------|---------------|----------|---------------|--------|
| <b>General</b> | Inventory | Substitutes | Manufacturing | Planning | Configuration | Custom |
|----------------|-----------|-------------|---------------|----------|---------------|--------|

Common [Costing](#) [Usage](#) [Export Information](#)

**Unit:** US008    **Item ID:** LT5003    **Standard Unit of Measure:** EA  
 Wheel Tire, 700x25

|                                                 |                                            |
|-------------------------------------------------|--------------------------------------------|
| <b>Item Status</b>                              |                                            |
| <b>Current Status Date:</b> 04/27/2000          | <b>*Current Status:</b> Active             |
| <b>Future Status Date:</b> <input type="text"/> | <b>Future Status:</b> <input type="text"/> |

**Default Cost Element:** 102 Material - Wheels    ☒ **Inventory Item**

**Standard Cost Group:**     **Current Purchase Cost:** 4.5600    **Avg Material Cost:** 0.0000

**Default Actual Cost:**     **Average Purchase Price:** 0.0000    **Last Price Paid:** 0.0000

|                                                               |                                              |
|---------------------------------------------------------------|----------------------------------------------|
| <b>Non-Owned</b>                                              |                                              |
| <input type="checkbox"/> <b>Non-Owned Item</b>                | <b>Vendor ID:</b> <input type="text"/>       |
| <input checked="" type="checkbox"/> <b>Consigned Purchase</b> | <b>Vendor Location:</b> <input type="text"/> |

[Related Links](#)

Define Business Unit Item - General: Common page

**Current Status Date,  
Current Status, Future  
Status Date, and Future  
Status**

See [Chapter 4, "Defining Items by SetID," Defining General Item Information, page 73.](#)

**Cost Element**

Select the default material cost element for all receipts. The system requires this value for average-costed, actual-costed, and standard-costed items. You define cost elements on the Cost Elements page.

**Inventory Item**

Appears by default from item definition at the setID level and cannot be overridden.

**Standard Cost Group**

Select a cost group code to select a set of items to roll up or update. You can also compare cost versions and report inventory value by cost group code. Establish cost group codes on the Cost Groups page, which you access from the Set Up Financials/Supply Chain - Product Related - Cost Accounting - Standard Cost Groups menu item.

**Current Purchase Cost**

Enter a value for the system to use to determine the material cost of purchased items and the lower-level material cost of a manufactured item when the cost type that you are rolling uses current costs. This value is per the standard UOM.

**Avg Matl Cost** (average material cost)

This average material cost is automatically updated when a purchase receipt is put away. The current value is stored in the AVERAGE\_COST\_MAT field of the BU\_ITEMS\_INV record. This cost reflects the vendor's price of the item. This average cost calculation includes only the material portion of the purchase order cost; it does not include landed costs, voucher updates, or cost adjustments.

**Default Actual Cost**

Enter a value for actual-costed items that can be used by the Update Stock Quantity (INPOPOST ) process if the item can be included in an inventory

count prior to an actual cost being generated from receipt of the item. The value in this field is used in these processes:

INS5050 (Reconciliation Report).

INS5200 (Slow Moving Inventory).

INS9080 (Forecasting Download).

INPBPROC (Confirmations).

INPOPROC, INPOTEST (Stock Qty Update).

INPQEOQC (Replenishment Parameters).

INPVVALD (Inventory Adjustments).

---

**Note.** You must enter a default actual cost if an average-costed book is defined for the business unit.

---

#### **Average Purchase Price**

The system updates this value whenever items are received and put away into an owned storage location or whenever the item is consigned. The only items that do not have this field updated are noncosted items or items for which all of the books are defined as standard costed. The average purchase price includes both the material and the landed cost of the item. This value is stored in the AVERAGE\_COST field of the BU\_ITEMS\_INV record.

#### **Last Price Paid**

The system updates this value when stock is put away from purchase receipts. It includes only the material cost of the received item.

#### **Non-Owned Item**

When you are adding an item to a VMI business unit, the item must be an inventory item, and it must be owned and non-consigned.

See [Chapter 4, “Defining Items by SetID,” Defining General Item Information, page 73](#).

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Using Vendor Managed Inventory”.

#### **Consigned Purchase**

If the item is non-owned, indicate whether it is also consigned in this business unit. Although consigned items are physically stocked in the business unit, they are owned by the vendors and are therefore not counted as part of the business unit’s total stock owned. They are, however, eligible for all inventory transactions.

---

**Note.** The item’s designation as non-owned or consigned appears by default from the Define Item - General: Common page, but you can override it. All transactions within PeopleSoft Inventory use the designation for the business unit rather than the designation that is assigned at the setID level.

---

#### **Vendor ID, Vendor Location**

If the item is consigned, you must indicate which vendor supplies the item by entering values. The item can be supplied to this business unit as a consigned item only by the vendor that you assign here. (Other vendors can supply the item as owned.) PeopleSoft Payables extracts this information for the creation of an invoice when the item is consumed.

---

**Note.** Consignment vendors must be established on the Procurement Options page (available from the Vendor Information - Location page, which you access from the Vendor Setup/Maintenance menu) before they are available for selection here.

---

## See Also

*PeopleSoft Enterprise Cost Management 9.0 PeopleBook*, “Structuring Your Cost Management System,” Setting Up the Cost Structure

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Receiving and Putting Away Stock”

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Managing Consigned Purchases Inventory”

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Managing Consigned Purchases Inventory,” Setting up the System for Consigned Purchases in Inventory Management

## Defining Item Cost Profiles

Access the Define Business Unit Item - General: Costing page.

The screenshot displays the 'Define Business Unit Item - General: Costing' page. At the top, there are tabs for 'General', 'Inventory', 'Substitutes', 'Manufacturing', 'Planning', 'Configuration', and 'Custom'. The 'General' tab is selected. Below the tabs, there are links for 'Common', 'Costing', 'Usage', and 'Export Information'. The 'Costing' link is active. The page contains several fields: 'Unit' (US008), 'Item ID' (LT5003), 'Standard Unit of Measure' (EA), 'Cost Profile Group' (1002), and 'Raw Material'. A 'Used in Mfg' checkbox is checked. Below these fields are two sections: 'Costing Details' and 'Profile'. The 'Costing Details' section includes 'Book Name' (FIN), 'Status' (Active), 'Ledger Group' (RECORDING), and 'Ledger' (LOCAL). The 'Profile' section includes 'Profile' (STD), 'Make Profile' (Y), 'Receipt Cost Method' (Standard Cost), 'Cost Flow' (First In First Out), and 'Deplete Cost Method' (Value at Current Standard).

Define Business Unit Item - General: Costing page

**Used in Mfg** (used in manufacturing)

Select if the item is used in PeopleSoft Manufacturing.

### Profile

Scroll through all the books for this business unit to view or set the cost profile for the item in each of those books. The profile for each book appears by default from the cost profile group that you define on the Define Item - General: Common page.

The item must have a cost profile for each book. If no cost profile group is associated with the item, or if a book is not associated with this cost profile group, the field is blank. Otherwise, an error message appears. You can change

the profile for an item in a book if the book is not seeded for that item and if you select the Allow Overrides to Profile check box on the Group - Books page.

---

**Note.** You cannot use this page to add or delete groups. To add, cancel, or delete books from a business unit, use the Define Inventory - Business Unit Books page.

---



---

**Warning!** Transactions involving a non-cost item (that is, items with a cost profile defined as non-cost) are not placed in the costing records by the Transaction Costing process. For example, putaway transactions are not moved to the CM\_RECEIPTS record. Use caution if you later decide to use this page to change an item's cost profile from non-cost item to an actual, standard, or average cost profile. After transactions have been generated in the system, changing a non-cost item can result in discrepancies between the costing and inventory records. A warning message displays on this page if you change the non-cost cost profile for an item with an on hand balance. If you decide to change a non-cost item please make sure you have no on hand quantity in the inventory business unit by running the Inventory Balance report (INS9090) and the Cost Management On hand Balance Validation report (CMS9010). Any inventory balance created while the business unit item used a non-cost profile will no longer be available when changing to another cost profile.

---

## See Also

*PeopleSoft Enterprise Cost Management 9.0 PeopleBook*, "Structuring Your Cost Management System," Setting Up the Cost Structure

## Defining Item Usage Attributes

Access the Define Business Unit Item - General: Usage page.

Use this page when tracking material usage for items that are issued from par locations.

### Usage Tracking

Select whether the item will be tracked for *Billing* or *Costing* purposes.

### Reconcile

Select to indicate that this item should go through the reconciliation process. This option is available after you select *Billing* or *Costing* in the Usage Tracking field.

## See Also

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Tracking Material Usage"

## Defining Item Export Information

Access the Define Business Unit Item - General: Export Information page.

### Export License Nbr (export license number)

The value is used in situations where the products that are shipped from the business unit are under a general classification of export license commonly known as the general destination license. This is the default export license that the system uses for products that do not specifically require export commodity control.

**ECCN** (export commodity control number)

Enter a value if the export control business needs require it.

**Origin Country**

Enter the country in which the item was originally manufactured. The system uses this value for Intrastat reporting purposes. The country is generally required for the Intrastat Arrivals Report; however, the PeopleSoft Intrastat Transaction Loader also provides the value in this field for arrival and dispatch transactions. You can enter a specific country code for the item. If you leave the field blank, the transaction loader uses the country code for the business unit that shipped the item as the default origin country for PeopleSoft Order Management and interunit shipment transactions.

**Region of Origin**

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

## Defining Customer Ship To Attributes for VMI Items

If the business unit is a VMI business unit, the VMI Ship To Customers link is displayed. Otherwise, the link is hidden. Only ship to customers that have material storage locations defined for the VMI business unit are displayed on this page.

**Select**

Select the check box next to the customers that have storage locations defined for the VMI business unit to indicate that they will stock the item.

**See Also**

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Using Vendor Managed Inventory”

## Defining Item Attributes for Shipping and Handling

Access the Define Business Unit Item - Inventory: Shipping/Handling page.

| General                                                                                                                                                                                                   | Inventory | Substitutes                             | Manufacturing | Planning                                                                                                                       | Configuration | Custom |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-----------------------------------------|---------------|--------------------------------------------------------------------------------------------------------------------------------|---------------|--------|
| Shipping/Handling <a href="#">Replenishment</a> <a href="#">Weight/Volume</a> <a href="#">Utilization Types</a>                                                                                           |           |                                         |               |                                                                                                                                |               |        |
| Unit: US008                                                                                                                                                                                               |           | Item ID: LT5003                         |               | Standard Unit of Measure: EA                                                                                                   |               |        |
| Wheel Tire, 700x25                                                                                                                                                                                        |           |                                         |               |                                                                                                                                |               |        |
| Ship Via: <input type="text"/>                                                                                                                                                                            |           | *Standard Pack Unit of Measure: EA      |               |                                                                                                                                |               |        |
| Stock Type: <input type="text"/>                                                                                                                                                                          |           | InterUnit Par Qty: <input type="text"/> |               |                                                                                                                                |               |        |
| UOM Conversion Flag: Convert to Standard UOM                                                                                                                                                              |           | Shelf Life (Days): <input type="text"/> |               | 0                                                                                                                              |               |        |
| <b>Inventory Attributes</b><br><input type="checkbox"/> Staged Date Control <input type="checkbox"/> Additional Handling<br><input type="checkbox"/> Isolate Item <input type="checkbox"/> Oversized Item |           |                                         |               | <b>Lot Control</b><br>Availability Lead Time (Days): <input type="text"/> 0<br>Retest Lead Time (Days): <input type="text"/> 0 |               |        |
| <a href="#">Assign Item to Zones</a>                                                                                                                                                                      |           |                                         |               |                                                                                                                                |               |        |

Define Business Unit Item - Inventory: Shipping/Handling page

|                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Ship Via</b>                                                  | For material stock requests, if the system does not find a ship via value for the item at the business unit level, then the system uses the ship via value that you define at the setID level. Establish ship via codes on the Ship Via Codes page, which you access from the Common Definitions menu.                                                                                                                                                                                                                                                                                                                                  |
| <b>Standard Pack Unit of Measure</b>                             | <p>The Shipping Carton Label (INS6025) process uses this value to determine how many labels to print.</p> <p>The UOMs must first be established on the Units of Measure page, which you access from the Common Definitions menu, before they are available for selection.</p>                                                                                                                                                                                                                                                                                                                                                           |
| <b>Stock Type</b>                                                | If the item is non-owned, you must select a value to identify the type of stock. Establish stock types on the Stock Types page, which you access from the Define Controls menu.                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>InterUnit Par Qty</b> (interunit par quantity)                | <p>Enter the minimum amount of stock that must be on hand in the business unit before the system fulfills interunit transfer requests.</p> <p>For example, suppose an interunit transfer request is made for 100 units of an item that has an interunit par quantity of 50. If the balance on hand in the business unit is 75 units, then only 25 units are available to transfer.</p> <p>PeopleSoft Inventory uses the interunit par quantity when entering material stock requests for interunit transfers and during reservation processing.</p>                                                                                     |
| <b>UOM Conversion Flag</b>                                       | <p>Select a value for processing transactions using a bar code-enabled system or the Fulfillment Engine feature in PeopleSoft Inventory. Values are:</p> <p><i>Convert to Default Stock UOM:</i> Converts the UOM on incoming transactions to the default stocking UOM.</p> <p><i>Convert to Standard UOM:</i> Converts the UOM on incoming transactions to the item's standard UOM. This value enables you to stock all the inventory in the standard UOM and perform material movement transactions by using any valid UOM for the item.</p> <p><i>Use Entered UOM:</i> Processes transactions with the UOM that the user enters.</p> |
| <b>Shelf Life (Days)</b>                                         | Enter the number of days that the item can remain in inventory before it is no longer usable. For lot-controlled items, PeopleSoft Inventory uses this value, along with the lot's creation date, to calculate the lot expiration date.                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Staged Date Control</b>                                       | This field appears by default from the Define Item - Inventory: Tracking/Description page.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Isolate Item</b>                                              | Select to restrict the item's putaway or transfer transactions to empty storage locations or to locations containing stock with the same item ID. The option is not valid if the item exists in mixed-item storage locations. After stock that is marked for isolation is transferred to an empty storage location, you cannot transfer or put away stock with any other item ID until the quantity in the location is fully depleted.                                                                                                                                                                                                  |
| <b>Additional Handling, Oversized Item</b>                       | PeopleSoft applications pass these values to the third-party system when calculating freight charges. You can also view this information on the Ship Container Details page.                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Availability Lead Time (Days) and Retest Lead Time (Days)</b> | If the item is lot-controlled, the availability lead time specifies the number of days between the lot's creation date and the date that it becomes available; the retest lead time specifies the number of days between a lot's creation date and                                                                                                                                                                                                                                                                                                                                                                                      |

the date that it needs to be retested. The Complete Putaway (INPPPTWY) process uses these lead times to calculate the lot's availability and retest dates.

---

**Note.** Although default values for shelf life and availability and retest lead times for the setID are established on the Define Item - Inventory: Tracking/Description page, PeopleSoft Inventory transactions requiring these parameters use the values that are defined at the business unit level.

---

### Assign Items to Zones

Click to access the Item Zone Assignments page, where you can associate the item with storage zones for putaway and picking that are established for the business unit. Zone assignment is optional; however, it enables much tighter control over the putaway and picking operations.

### See Also

*PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook*, "Processing Enterprise Integration Points (EIPs)," Purging Transactions

Chapter 2, "Working with Items," Using Units of Measure, page 30

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Preparing to Implement PeopleSoft Inventory," Defining Staged-Date Tracking

## Associating an Item with Putaway and Picking Zones

Access the Item Zone Assignments page.

### Priority

PeopleSoft Inventory uses zone priority levels to determine which storage locations to use when putting away or picking the item. For example, suppose that you assign an item to two putaway zones, specifying that the first priority zone is fast-moving goods and the second priority zone is bulk storage. During putaway, the system first tries to place the item into the fast moving goods zone; if not enough space is available in fast-moving goods, the system moves on to bulk storage. If you assign these same zones as picking zones, the picking plan directs pickers first to locations in the fast-moving goods zone, then to locations in the bulk storage zone.

### Zone Code

The options include all zones that are defined for the business unit that are also identified as putaway or picking zones for at least one storage location.

---

**Note.** Zone codes (defined on the Storage Zone Codes page, which you access from the Inventory menu) and storage location zone assignments (defined on the Zone Assignments page, which you access from the Maintain Storage Locations menu) must be established before they are available for selection.

---

### See Also

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Structuring Inventory," Establishing Putaway and Picking Zones

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Receiving and Putting Away Stock," Setting Up Putaway Defaults and Rules

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Picking Inventory," Picking Zones

## Defining Item Replenishment Attributes

Access the Define Business Unit Item - Inventory: Replenishment page.

| General                                                                                                                                            |       | Inventory                     |        | Substitutes                                                                                                                                                       |  | Manufacturing                     |  | Planning |  | Configuration |  | Custom |  |
|----------------------------------------------------------------------------------------------------------------------------------------------------|-------|-------------------------------|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|-----------------------------------|--|----------|--|---------------|--|--------|--|
| <a href="#">Shipping/Handling</a>                                                                                                                  |       | <a href="#">Replenishment</a> |        | <a href="#">Weight/Volume</a>                                                                                                                                     |  | <a href="#">Utilization Types</a> |  |          |  |               |  |        |  |
| Unit:                                                                                                                                              | US008 | Item ID:                      | LT5003 | Standard Unit of Measure:                                                                                                                                         |  |                                   |  | EA       |  |               |  |        |  |
|                                                                                                                                                    |       |                               |        | Wheel Tire, 700x25                                                                                                                                                |  |                                   |  |          |  |               |  |        |  |
| <b>Replenishment Options</b><br><input checked="" type="checkbox"/> Not Included In Replenishment<br><input type="checkbox"/> Include WIP Quantity |       |                               |        | <b>Replenishment Demand Options</b><br><input type="checkbox"/> Include Demand<br>Offset Days Option: <input type="text"/><br>Offset (Days): <input type="text"/> |  |                                   |  |          |  |               |  |        |  |
| Reorder Quantity Option:                                                                                                                           |       |                               |        | Use Business Unit Default                                                                                                                                         |  |                                   |  |          |  |               |  |        |  |
| Replenish Class:                                                                                                                                   |       |                               |        | <input type="text"/>                                                                                                                                              |  |                                   |  |          |  |               |  |        |  |
| Replenish Calc Period (Days):                                                                                                                      |       |                               |        | 365                                                                                                                                                               |  |                                   |  |          |  |               |  |        |  |
| Reorder Point:                                                                                                                                     |       |                               |        | <input type="text"/>                                                                                                                                              |  |                                   |  |          |  |               |  |        |  |
| Maximum Quantity:                                                                                                                                  |       |                               |        | <input type="text"/>                                                                                                                                              |  |                                   |  |          |  |               |  |        |  |
| Last Annual Demand:                                                                                                                                |       |                               |        | <input type="text"/>                                                                                                                                              |  |                                   |  |          |  |               |  |        |  |
| Desired Stock-In Probability:                                                                                                                      |       |                               |        | 95.0 %                                                                                                                                                            |  |                                   |  |          |  |               |  |        |  |
|                                                                                                                                                    |       |                               |        | Replenish Lead (Days): <input type="text"/>                                                                                                                       |  |                                   |  |          |  |               |  |        |  |
|                                                                                                                                                    |       |                               |        | Reorder Quantity: <input type="text"/>                                                                                                                            |  |                                   |  |          |  |               |  |        |  |
|                                                                                                                                                    |       |                               |        | Safety Stock: <input type="text"/>                                                                                                                                |  |                                   |  |          |  |               |  |        |  |
|                                                                                                                                                    |       |                               |        | Economic Order Quantity: <input type="text"/>                                                                                                                     |  |                                   |  |          |  |               |  |        |  |

Define Business Unit Item - Inventory: Replenishment page

### Not Included In Replenishment

Select to exclude the item from being processed by the Replenishment Options process (INPRROPT) and the Replenishment Parameters (INPQRPLP) process for the business unit. For example, select this check box if you use PeopleSoft Supply Planning to handle replenishment.

### Include WIP Quantity

Select to enable the Replenishment Options process to add the quantity in WIP storage locations to the quantity that is available when determining whether an item has reached its reorder point.

**Note.** Items in WIP locations are not considered to be available, so you must select this check box if you want to include WIP quantities in the replenishment calculation.

### Include Demand

Select to include all unreserved demand in the reorder point calculation. The time period for unreserved demand is determined by the entry in the Offset Days Option field.

### Offset Days Option

Select *Offset Days* to specify that the system should use offset days in the reorder point calculation. Select *Replenish Lead Days* to specify that the system should use replenish lead days in the reorder point calculation. This option is not available if the Include Demand option is not selected.

### Offset (Days)

Enter the number of days if the Offset Days option was selected. This option is not available if the Offset Days option is not selected.

### Reorder Quantity Option

Select the option for reorder quantities:

*Use Business Unit Default:* The system will use the Reorder Point Order Quantity option that is selected for the business unit.

*EOQ (economic order quantity):* The system creates replenishment requests using the economic order quantity.

*Min/Max:* The system calculates the order quantity that is required to meet the maximum stocking level.

*Static Reorder Qty:* The system creates replenishment requests using the reorder quantity.

### **Replenish Class**

Categorizes the items by usage profile. This information is required if the item is included in replenishment processing. Establish replenishment classes on the Replenishment Classes page, which you access from the Define Controls menu.

### **Replenish Calc Period (Days)** (replenishment calculation period in days)

Enter the number of days to use in calculating the item's replenishment values.

### **Replenish Lead (Days)** (replenishment lead time in days)

Enter the average number of days from placement of the purchase order to receipt of the stock. Enter this field manually or let PeopleSoft Inventory calculate it.

### **Reorder Point**

If the sum of an item's available quantity and its on-order quantity is less than or equal to this value for the item, then the Replenishment Options process generates a replenishment request for restocking purposes. Establish the reorder point levels or let PeopleSoft Inventory calculate a reorder point.

### **Reorder Quantity**

Enter the static quantity that is ordered by automated replenishment events. Reorder quantities are subject to vendor minimum and maximum analysis during procurement. If PeopleSoft Inventory calculates a reorder quantity that is less than the reorder point, it resets the reorder quantity to be equal to the reorder point the next time that you save the page. Otherwise, the stock level never rises above the reorder point, and PeopleSoft Inventory is caught in a loop of reordering insufficient quantity.

### **Maximum Quantity**

Enter the maximum stocking quantity for the item.

### **Safety Stock**

Enter a buffer stocking level to guard against unanticipated surges (or spikes) in average daily demand. Establish the safety stock levels for the item or let PeopleSoft Inventory calculate a statistical value for safety stock.

### **Last Annual Demand**

Enter a value for EOQ calculations. Enter the last annual demand manually or let PeopleSoft Inventory calculate it.

### **Economic Order Quantity**

Enter a fixed-order quantity to determine the amount of an item to purchase or manufacture at one time. The EOQ should minimize the combined costs of acquiring and carrying inventory. You can use the EOQ as the automated replenishment's reorder quantity. Enter an EOQ value or let PeopleSoft Inventory calculate it.

### **Desired Stock-In Probability**

Enter the percentage of the time that you want stock on hand for an item. PeopleSoft Inventory uses this value in safety stock calculations.

### **See Also**

*PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Replenishing Inventory"*

## Defining Item Information for Weight and Volume

Access the Define Business Unit Item - Inventory: Weight/Volume page.

|                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                     |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Packing Code</b>                                                                                                                                                                                                                                                                               | See <a href="#">Chapter 4, “Defining Items by SetID,” Establishing Item Shipping and Handling Attributes, page 82.</a>                                                                                                                                                                              |
| <b>Packaging Code</b>                                                                                                                                                                                                                                                                             | Establish packaging codes on the Item Packaging Codes Page, which you access from the Set Up Financials/Supply Chain - Product Related - Inventory menu, It can also be displayed in the Packing Session (PACK_EST_SHIP) component, which you access from the Fulfill Stock Orders - Shipping menu. |
| <b>Container Type</b>                                                                                                                                                                                                                                                                             | Establish container types by using the Container Types (CNTR_TYPE_INV_1) component, which you access from the Maintain Containers menu.                                                                                                                                                             |
| <b>Stocking Weight and Stocking Volume</b>                                                                                                                                                                                                                                                        | Enter the measurements for the item, plus any external straps, containers, pallets, or packing material that you use to stock the item. Enter values based on the UOM.                                                                                                                              |
| <hr/> <b>Note.</b> If you change the stocking weight and volume, you must recalculate capacity for the storage locations where capacity is tracked. For each storage location where the item is stored, select the Calc capacity at save time option on the Volume/Weight Capacity Checking page. |                                                                                                                                                                                                                                                                                                     |
| <b>Shipping Weight and Shipping Volume</b>                                                                                                                                                                                                                                                        | Enter the stocking measurements, plus any packing material or container measurements that you need for shipment. Enter values based on the UOM.                                                                                                                                                     |

### See Also

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Structuring Inventory,” Checking Storage Location Capacity

## Defining Item Utilization Types

Access the Define Business Unit Item - Inventory: Utilization Types page.

The screenshot shows the 'Define Business Unit Item - Inventory: Utilization Types' page. At the top, there are tabs for 'General', 'Inventory', 'Substitutes', 'Manufacturing', 'Planning', 'Configuration', and 'Custom'. The 'Inventory' tab is selected, and the 'Utilization Types' sub-tab is active. Below the tabs, there are fields for 'Unit' (US010), 'Item ID' (10012), and 'Standard Unit of Measure' (EA). The 'Item ID' field also displays 'Pro5500 Road Helmet'. Below these fields, there is a section titled 'Utilization Types' with a search bar and a list of utilization types. The first entry is 'CYCL' with a magnifying glass icon and the text 'Cycle count default'. Below this, there are fields for 'Utilization Type', 'Last Cycle Count' (04/21/2000), 'Cyc Interval (days)', 'Next Cycle Count', 'Last Physical Count', and 'Family' (PRO). There are also checkboxes for 'For Planning' and 'For Cycle Count'.

Define Business Unit Item - Inventory: Utilization Types page

|                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|--------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Utilization Group</b>                                                                   | Select the utilization group to which this item belongs. Utilization groups are set up on the Items - Define Controls - Utilization Groups page.                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Utilization Type</b>                                                                    | The Utilization Type Calculation (IN_UTIL_AE ) process assigns a type to an item. The system uses utilization types in conjunction with the due to count option for cycle counts.                                                                                                                                                                                                                                                                                                                                                |
| <b>Last Cycle Count, Cycle Interval (days) (cycle interval days), and Next Cycle Count</b> | <p>PeopleSoft Inventory considers the item's last cycle count date and cycle interval days, and then automatically calculates the next cycle count date when you launch the page.</p> <hr/> <p><b>Note.</b> If the business unit requires closure-calendar validation and processing for materials management activities as defined on the Closure Calendar page, and if the next cycle count date is on a defined closure date, then the system returns the first future valid date that is defined for the function.</p> <hr/> |
| <b>Last Physical Count</b>                                                                 | The value from the Update Stock Quantity process.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>For Planning</b>                                                                        | Select to indicate whether this is the default utilization group for inventory planning. This default is established on the Util Group Inv (Inventory Utilization Group) page, but can be overridden on this page.                                                                                                                                                                                                                                                                                                               |
| <b>For Cycle Count</b>                                                                     | Select to indicate whether this is the default utilization group for cycle counts. This default is established on the Util Group Inv page.                                                                                                                                                                                                                                                                                                                                                                                       |

## See Also

Chapter 3, "Defining Item Control Values," Defining Utilization Types, page 69

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Counting Inventory Stock"

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Counting Inventory Stock," Calculating Utilization Type Classifications

## Defining Manufacturing Information for an Item

Access the Define Business Unit Item - Manufacturing: General page.

| General                                                                                                                                                             |                      | Inventory |  | Substitutes                                                                                                                                                                                                                                      |                                                                                                  | Manufacturing |  | Planning                  |  | Configuration |    | Custom |  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|-----------|--|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|---------------|--|---------------------------|--|---------------|----|--------|--|
| General <a href="#">WIP Replenishment</a>                                                                                                                           |                      |           |  |                                                                                                                                                                                                                                                  |                                                                                                  |               |  |                           |  |               |    |        |  |
| Unit:                                                                                                                                                               | US008                |           |  | Item ID:                                                                                                                                                                                                                                         | LT5000                                                                                           |               |  | Standard Unit of Measure: |  |               | EA |        |  |
| Standard Wheel Subassembly                                                                                                                                          |                      |           |  |                                                                                                                                                                                                                                                  |                                                                                                  |               |  |                           |  |               |    |        |  |
| Production Area:                                                                                                                                                    | <input type="text"/> |           |  | <input type="checkbox"/> Calc Comp Yield at Completion                                                                                                                                                                                           | Component Issue Method                                                                           |               |  |                           |  |               |    |        |  |
| Source Code:                                                                                                                                                        | Make                 |           |  | <input type="checkbox"/> Phantom Item                                                                                                                                                                                                            | <input type="radio"/> Issue <input type="radio"/> Kit <input checked="" type="radio"/> Replenish |               |  |                           |  |               |    |        |  |
| Average Order Qty:                                                                                                                                                  | 50.0000              |           |  | BOM Usage                                                                                                                                                                                                                                        |                                                                                                  |               |  |                           |  |               |    |        |  |
| Associated Primary BOM:                                                                                                                                             | LT5000               |           |  | <input checked="" type="checkbox"/> Revision Control <input type="radio"/> By Effectivity Date<br><input checked="" type="checkbox"/> Auto Revision <input type="radio"/> By Revision                                                            |                                                                                                  |               |  |                           |  |               |    |        |  |
| Master Routing Option                                                                                                                                               |                      |           |  | Production Option Control                                                                                                                                                                                                                        |                                                                                                  |               |  |                           |  |               |    |        |  |
| <input checked="" type="radio"/> Item <input type="radio"/> Item Group <input type="radio"/> Item Family<br><br>Reference Routing Item: <input type="text"/> LT5000 |                      |           |  | <input checked="" type="radio"/> Use BOM/Routing Defaults    BOM Code: <input type="text"/><br><input type="radio"/> Use Prdn Option Maintenance    Routing Code: <input type="text"/><br><input type="checkbox"/> Valid Production Options only |                                                                                                  |               |  |                           |  |               |    |        |  |

Define Business Unit Item - Manufacturing: General page

### Production Area

PeopleSoft Product Configurator uses this as the default production area for configured items, and it also uses it to search for the item's production options. PeopleSoft Supply Planning uses the production area that is defined here when the system creates planned production orders and when the business unit and item aren't associated with a production area.

**Note.** You must create a production area and associate the item with it before specifying the production area information by using this page.

### Calc Comp Yield at Completion (calculate component yield at completion)

Select this option to calculate component yield automatically when recording a completion at an operation, a completion to stock, or an assembly scrap. If you do not select this option, the system doesn't calculate component yield at completions. If you want to calculate component yield manually, clear the check box and enter component yield by editing components during the Completions process by using the Edit/Issue Components component.

### Source Code

Select a value:

*Buy:* Items that you typically purchase.

*Expense:* Non-inventory items for which you do not maintain quantity on hand.

*Floor Stck* (floor stock): Items that you maintain in inventory, but don't expense until you issue them to production. These might represent low-cost items that issue in bulk to production and do not monitor for cost or quantity on hand. Both floor stock and expense items can be specified as components on a BOM but are not issued to production, considered in planning, or included in the assembly item's cost. You cannot create BOMs, routings, production IDs, or production schedules for floor stock or expense items.

Floor stock items cannot be identified as serial in production or the trace usage cannot be set to serial or lot.

*Make:* Assemblies or subassemblies that you manufacture in house, at a subcontractor, or both. For this source code, select the Phantom Item option to issue all components for this item, instead of issuing the item itself, within PeopleSoft Manufacturing.

*Make:* Assemblies or subassemblies that you manufacture in house, at a subcontractor, or both. For this source code, select the Phantom Item option to issue all components for this item, instead of issuing the item itself, within PeopleSoft Manufacturing.

---

**Important!** The source code for serial in production or trace usage items must be Make or Buy.

---

*Planning:* Non-inventory items that can represent a family or group of inventory items for which you do not maintain quantity on hand. Planning items can have a planning BOM or planning routing and can be components on a planning BOM. However, you cannot specify planning items on a production or engineering BOM or routing, or use them as a component in production.

---

**Note.** Because you define expense and planning items as non-inventory items at the setID level, many of the attributes are not applicable, and all fields except the Business Unit, Item ID, and Source Code are unavailable.

---

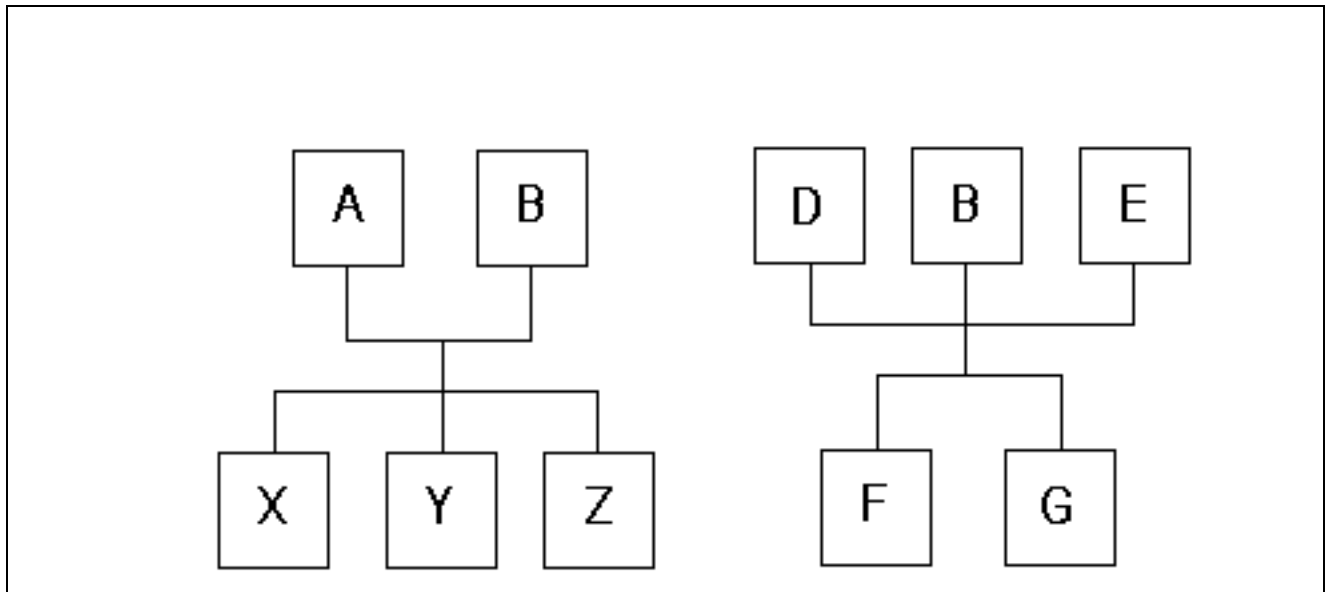
**Average Order Qty**  
(average order quantity)

The typical batch or lot size that is used to produce this item. PeopleSoft Managing Costs uses this value when calculating per unit setup, fixed-run, and post production conversion costs. The system determines each cost by dividing the cost of each process by the average order quantity (AOQ). Typically, it calculates these costs at the operation level, then adds the costs for each operation together to provide the total cost. When the production order quantity differs from the AOQ here, and when the per unit setup, fixed run, and post-production conversion costs differ as well, the system calculates a labor and machine and a material lot size variance. The Linear Programming solver in PeopleSoft Supply Planning uses the AOQ as a standard lot size.

**Associated Primary BOM**(associated primary bill of material)

If you use multiple outputs, a given co-product might be created in more than one way; in other words, an item is a co-product on more than one item's primary BOM. By assigning an associated primary BOM to a co-product, you tell the system which BOM to use in exploding the co-product to the next level.

This diagram illustrates multiple outputs:



Example: Two processes with the same co-product

In the first structure, A is the primary item, B is the co-product, and X, Y, and Z are the components. In the second structure, D is the primary, B and E are the co-products, and F and G are the components. Because two ways of making the same product are available, you need to decide which structure to use when exploding to lower levels. Therefore, you need to signify a primary structure (Associated Primary BOM) that is associated with each item that may exist as a co-product but not as a primary. To do this, you can assign B's associated primary BOM as either A or D. If B has its own BOM structure and you want to use that structure when exploding to lower levels, then you can leave B's associated primary BOM as B.

|                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Component Issue Method</b>             | Defines how to issue the item to the shop floor. If you define an item's component issue method as <i>Use Component's Method</i> for a production area on the Production Area/Item page, the system uses the component issue method that you define here.                                                                                                                                                                               |
| <b>Issue</b>                              | Enables you to generate a picking plan and use PUSH or PULL to issue material directly from PeopleSoft Inventory to the operation's work center. The operation's work center for the component is defined on the routing.                                                                                                                                                                                                               |
| <b>Kit</b>                                | Enables you to issue components directly to a production ID. As in the production issue method, you use a picking plan to list the required items. The items are then assembled into batches for each order. The material is charged to the production order when it is issued.                                                                                                                                                         |
| <b>Replenish</b>                          | Enables you to stock components in the WIP locations that are associated with the work center in which you use the components. The item is typically stocked to a maximum stocking level. When the quantity on hand falls below the replenishment point, a notification is sent to the stockroom.                                                                                                                                       |
| <b>BOM Usage</b> (bill of material usage) | <p>If you change from not maintaining revision control to maintaining revision control, and if you create one or more BOMs for the item, then you must make sure that the effectivity dates on the BOMs align with the effectivity dates on the revisions.</p> <p>If you do not select the Revision Control option, then the BOM Usage group box is unavailable for entry and By Effectivity Date appears by default for BOM usage.</p> |

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**Note.** The BOM usage settings, displayed on this page, appear by default from settings that are defined at the business unit level on the Manufacturing Business Unit Options page. You can, however, overwrite those business unit settings here.

---

|                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Revision Control</b>          | <p>If you select this option, and BOMs exist for the assembly item, then the dates for the components that are specified in the BOMs must be aligned with the dates within the revisions. If you select this option, you can select By Effectivity Date or By Revision to define how you want to maintain a BOM for this item. A BOM for the item need not exist for you to make this choice.</p> <p>You can always clear this option without deleting any revisions for the item.</p>                                                                                                                                                                                                                                                                                                                                                       |
| <b>By Effectivity Date</b>       | <p>You can enter dates on which components are in effect for an assembly's product structure when maintaining BOMs by using the BOM Maintenance Summary and Component pages. The system validates these dates so that they align with item revision dates.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Auto Revision</b>             | <p>If you select Revision Control, you can select this option. Selecting it indicates that revisions for the item can be automatically generated by using a scheme that is defined at the business unit level. If revisions are already created manually with the Revision Maintenance component, then the system uses the revision scheme to select the next available revision. If you want the system to create item revisions automatically, you can use the mass maintenance process in either PeopleSoft Manufacturing (by using the BOM Mass Maintenance by Mass Maintenance Code component) or PeopleSoft Engineering (by using the BOM Mass Maintenance by Engineering Change Order component). The mass maintenance process creates revisions only for those items that have both Revision Control and Auto Revision selected.</p> |
| <b>By Revision</b>               | <p>You can associate effective and obsolete revisions with components by using the BOM Maintenance and Component pages. Specify revision dates on the Rev Maintenance page.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Item</b>                      | <p>Select to link an item directly to the routings of the item that you select in the Reference Routing Item field. The default is the item itself.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Item Group</b>                | <p>Select to link the routings of a reference routing item to an item group. Before you use this option, define item group routings on the Group Rtg Assignment page</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Item Family</b>               | <p>Select to link the routings of a reference routing item to an item family. Before you use this option, define item group routings on the Family Rtg Assignment page.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Production Option Control</b> | <p>Determines whether the system uses BOM/routing defaults or uses production option maintenance. By using this page, you control how you define production options at the business unit and item level. This information is used by Supply Planning to extract data based on the option that you select from these two choices.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Use BOM/Routing Defaults</b>  | <p>Select this option if specific BOM/Routing combinations are not required. In addition, you can limit the number of BOM/routing combinations that are extracted to PeopleSoft Supply Planning by using the BOM and Routing fields in the Production Option Control group box. If you select this option, first create BOM and routing codes for an item, and then use the Production</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

**Use Prdn Option Maintenance** (use production option maintenance)

Option Maintenance component to link the BOM and routing codes together and (optionally) assign them to production areas.

If you select this option, you cannot access the Production Option Maintenance component for the item, but you can still limit the production options that are created in PeopleSoft Supply Planning by selecting a BOM code, a routing code, or both.

Select this option if you want to define specific BOM/routing combinations that can be extracted to PeopleSoft Supply Planning or used to create production IDs and production schedules. In addition, you can effective-date the BOM/routing combinations (for example, if you want to handle seasonal variations in the product mix).

If you select this option, first create BOM and routing codes for an item.

Next, use the Production Option Maintenance component to link the BOM and routing codes together and (optionally) assign them to production areas.

Select the Include in Planning check box to specify which BOM/routing combinations the Production DataLink sends to the Planning engine.

Finally, create production IDs and production schedules for the item.

**BOM Code and Routing Code**

Enter values to limit the number of BOM and routing combinations that the system extracts to PeopleSoft Supply Planning.

**Valid Production Options only**

If you select Use Prdn Option Maintenance, select this option only if you want to use predefined production options when creating production IDs. Do not select it if you want to be able to specify, in the Production ID Maintenance component, BOM/routing combinations that are not defined with the Production Option Maintenance component.

With either option (using production option maintenance or using BOM/routing defaults), you can create specific BOM/routing combinations for PeopleSoft Supply Planning. By selecting a specific BOM code and a routing code, you can limit the number of BOM/routing combinations that are extracted by PeopleSoft Supply Planning. For example, by picking a specific BOM code and routing code, you eliminate all but this specific combination from consideration. At the other extreme, if you leave both fields blank, PeopleSoft Supply Planning extracts all possible combinations. Here is an outline of the production options that are created when you select various BOM code and routing code combinations:

| <b>BOM Code and Routing Code Settings</b>             | <b>Production Options Created</b>                                                                 |
|-------------------------------------------------------|---------------------------------------------------------------------------------------------------|
| Both BOM code and routing code are blank.             | The system creates a production option for every possible BOM/routing combination.                |
| A BOM code is selected but the routing code is blank. | The system creates a production option for all routing codes with the specific BOM code selected. |
| A routing code is selected and the BOM code is blank. | The system creates production options for all BOMs with the specific routing code selected.       |
| Both a routing code and a BOM code are selected.      | The system creates one production option for the single specified BOM/routing combination.        |

## See Also

*PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Setting Up Production Areas”

*PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Maintaining Component Lists”

*PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Maintaining Bills of Material,” Assigning Associated Primary BOMs

*PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Defining Your Business Unit Structure”

*PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Structuring Routings”

*PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Defining Your Business Unit Structure,” Setting Up Manufacturing Business Unit Production Options

## Setting Up Item Replenishment Defaults

Access the Define Business Unit Item - Manufacturing: WIP Replenishment page.

Define Business Unit Item - Manufacturing: WIP Replenishment page

When creating replenishment requests or Kanban cards, the system checks whether production replenishment location default values exist first, then looks to the WIP replenishment default values that you set up for replenishment guidelines.

**Repl Point** (replenishment point) and **Iss Mult** (issue multiple)

Enter a value if you are using production replenishment as the component issue method. When the quantity that is on hand in the WIP location drops below the specified replenishment point, the system issues a workflow replenishment request indicating that additional material needs to be supplied, using the issue multiple that you specify here. If you use PeopleSoft Flow Production, the system uses the issue multiple for the Kanban quantity. If you do not have PeopleSoft Flow Production installed, the system uses only the Repl Point for items that have a WIP replenishment mode of Backflush-Controlled.

**Repl Max Qty** (replenishment maximum quantity), **WIP RPL Mode** (WIP replenishment mode), and **WIP RPL Type** (WIP replenishment type)

If you don't use PeopleSoft Flow Production, the WIP fields are unavailable for entry. In this case, the system uses defaults for a WIP replenishment mode of *Backflush Controlled* and a replenishment method of *Workflow*.

If you use PeopleSoft Flow Production, enter a replenishment maximum quantity to set the maximum amount of the item that you want stored at any WIP location using the item. It includes the item's on-hand quantity and any

open requests that are already made. The system issues a warning message if you perform a replenishment transaction that exceeds the replenishment maximum quantity. The replenishment maximum quantity is available for only those items that use the manual replenishment mode.

PeopleSoft Flow Production uses the WIP RPL Mode to determine how to generate replenishment requests for this item. Options include:

*Backflush Controlled:* You consume components from the WIP location while backflushing completions. When the quantity on hand falls below the replenishment point, the system automatically generates a replenishment request to bring the on-hand quantity back above the replenishment point. The replenishment request is a multiple of the issue multiple. For example, if the replenishment point is 60, the on-hand quantity is 30, and the issue multiple is 20, then the system generates a replenishment request for 40 to bring the on-hand WIP location quantity back above the replenishment point.

*Kanban Card:* The replenishment process uses Kanban cards as a manual request for material. In this scenario, Kanban cards are either entered or imported into the system and then printed out. 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 Kanban cards are picked up periodically at the WIP location and taken to a Kanban sorting room or to the source location (such as inventory, feeder line, or vendor) on the card to get the components.

*Manual:* You have a visual indicator that the WIP location needs replenishment, and you scan in the item ID and WIP location to generate a replenishment request for the specified issue multiple. This request includes the replenishment quantity and source location that is associated with that item and WIP location. This is largely used with electronic data collection.

#### **WIP RPL Source** (WIP replenishment source)

Determines where you send the PeopleSoft Flow Production replenishment request and what source supplies the WIP location. Options include:

*Feeder:* A feeder line creates subassemblies that it feeds into the main production line. When you use a certain quantity of the subassemblies, you send a replenishment signal to start production on the feeder line.

If you select this option, select the WIP production area that serves as a feeder line for this item.

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

*Vendor:* Use vendor replenishment to replenish the WIP location by directly receiving purchased components from a vendor. If you select this option, select the vendor ID and vendor location that directly replenish this item. You can override this prior to dispatch if necessary.

#### **WIP RPL Method** (WIP replenishment method)

Designate how the PeopleSoft Flow Production replenishment request is communicated. You must select *Backflush* or *Manual* as the WIP replenishment mode to use WIP replenishment methods. For vendor replenishment, a separate replenishment method is available and none of these options are used. The available WIP replenishment method options include:

*Workflow:* The system generates a worklist entry that takes you to the Production Replenishment worklist and uses defaults for the item, quantity, and from/to WIP locations. You can override the values to complete the transfer.

**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 supplies the default item, Kanban quantity, source, and WIP location information.

**Pull List:** A pull list is a list of Kanban requests that you use in a manner similar to the way you use a pick list. You scan in Kanban IDs to transfer quantities. You run the Pull List process on a scheduled basis, which picks up all new requests. As you do with pull tickets, you scan in the Kanban ID from the pull list to process each request.

### Source Location

If you select *Inventory* as the WIP replenishment source, this field is available for entry. Select the source storage location that replenishes this item. The location field is not mandatory but, if entered, must be a valid location. The storage levels that appear depend on the storage structure that is established on the Inventory Options page, which you access from the Set Up Financials/Supply Chain - Business Unit Related - Inventory menu.

### See Also

*PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Understanding PeopleSoft Manufacturing,” Flow Production

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Structuring Inventory,” Searching for Material Storage Locations

## Specifying Planning Information for an Item

Access the Define Business Unit Item - Planning: General page.

General [Fences/Lead Time](#) [Forecast](#) [Order Modifiers](#)

**Unit:** US008 **Item ID:** SR1001 **Standard Unit of Measure:** EA

Omega 500 Touring Bike

**Planner Cd:**

**\*Planned By:**

☒ Demand Planning Item

☒ Inventory Policy Planning Item

**Purchase Sourcing**

☐ Use Ship To Locations

☐ Spot Buy

Define Business Unit Item - Planning: General page

### Planner Cd (planner code)

Planner codes are used to filter information in most pages and processes in PeopleSoft Supply Planning. Third-party forecasting applications also use planner codes. You set up planner codes by using the Planner Code page, which you access from the Set Up Financials/Supply Chain - Product Related - Planning menu.

**Planned By**

Select one of these methods:

*Distribution Planning:* Select this method if you want to include the item in the distribution plan. The distribution plan typically displays the tasks that are quantities associated with the movement of the item throughout the distribution and manufacturing business units of the supply chain. Distribution-planned items are included in the PeopleSoft Supply Planning data model.

You should select this option if the item is planned across multiple business units and is either a transfer or purchase item. A distribution-planned item is most likely a finished good or spare part that is used to fulfill customer demand at an inventory-only business unit.

*Master Planning:* Select this method if you want to include the item in the master plan. The master plan provides a schedule of planned orders for the item at each manufacturing site.

Typically, master-planned items are the top-level, finished-good manufactured items. Master-planned items can be included in either PeopleSoft Supply Planning models. You use the Manufacturing Business Unit Options page to specify which model (Supply Planning) includes the master plan.

When the master plan is included in the PeopleSoft Supply Planning model, the system models production in a collapsed, aggregate view of all production capabilities for the item that is associated with the business unit. In addition, new planned orders and rescheduled messages for production can be returned from the planning server.

When the master plan is included in the PeopleSoft Supply Planning model, the system models production based on the detailed bills and routings that are defined for the item in PeopleSoft Manufacturing.

*Material Planning:* Select this method if you want to include the item in the material plan. The material plan schedules the raw materials and subassemblies that are required, supporting the production of finished goods. Material-planned items are included in the PeopleSoft Supply Planning model only.

*Not Planned:* Select this method if you do not want to include the item in any of the PeopleSoft Supply Planning generated plans.

**Demand Planning Item**

Select to indicate that this item is available to be download from PeopleSoft Supply Chain Management tables into PeopleSoft Demand Planning.

**Inventory Policy Planning Item**

Select to indicate that this item is available to be downloaded from PeopleSoft Supply Chain Management tables into PeopleSoft Inventory Policy Planning.

**Use Ship To Locations**

Select this option if you want to model sourcing requirements for new planned purchase orders based on the ship to location information that is established for vendors within PeopleSoft Purchasing. By using the ship to location information, you can establish specific purchase-source definitions for a single inventory business unit. If you don't select this option, the system bases the sourcing requirements for new planned orders on the item/vendor information. This information is used by the PeopleSoft Supply Planning solvers for modeling purposes.

**Spot Buy**

Select to indicate that this item is used by PeopleSoft Strategic Sourcing. This information is used by PeopleSoft Supply Planning solvers for modeling purposes.

## Defining Generation of Item Supply Information

Access the Define Business Unit Item - Planning: Fences/Lead Time page.

| General                                                                                                           | Inventory | Substitutes                                                       | Manufacturing | Planning                                                                   | Configuration | Custom                                                            |
|-------------------------------------------------------------------------------------------------------------------|-----------|-------------------------------------------------------------------|---------------|----------------------------------------------------------------------------|---------------|-------------------------------------------------------------------|
| <a href="#">General</a> <a href="#">Fences/Lead Time</a> <a href="#">Forecast</a> <a href="#">Order Modifiers</a> |           |                                                                   |               |                                                                            |               |                                                                   |
| Unit: US008                                                                                                       |           | Item ID: SR1001                                                   |               | Standard Unit of Measure: EA                                               |               |                                                                   |
| Omega 500 Touring Bike                                                                                            |           |                                                                   |               |                                                                            |               |                                                                   |
| Planning Time Fence [days]:                                                                                       |           | <input type="text" value="7.00"/>                                 |               | Safety Stock Level:                                                        |               | <input type="text"/>                                              |
| Action Message Cutoff [days]:                                                                                     |           | <input type="text" value="60.00"/>                                |               | Excess Stock Level:                                                        |               | <input type="text"/>                                              |
| Reschedule In Factor [days]:                                                                                      |           | <input type="text"/>                                              |               | Fixed Period (days):                                                       |               | <input type="text"/>                                              |
| Reschedule Out Factor [days]:                                                                                     |           | <input type="text"/>                                              |               | <input checked="" type="checkbox"/> Use Global Early Fence<br>Early Fence: |               |                                                                   |
| <b>Production Lead Times</b>                                                                                      |           |                                                                   |               |                                                                            |               |                                                                   |
| <input type="checkbox"/> Use Lead Time                                                                            |           |                                                                   |               |                                                                            |               |                                                                   |
| Fixed Lead Time:                                                                                                  |           | <input type="text" value="0"/> <input type="text" value="Hours"/> |               | Variable Lead Time:                                                        |               | <input type="text" value="0"/> <input type="text" value="Hours"/> |
| <b>New Order Fence (days)</b>                                                                                     |           |                                                                   |               |                                                                            |               |                                                                   |
| Released Order:                                                                                                   |           | <input type="text" value="999"/>                                  |               | Firmed Order:                                                              |               | <input type="text"/>                                              |

Define Business Unit Item - Planning: Fences/Lead Time page

- Planning Time Fence [days]** Identifies when changes or recommendations for an item are difficult to react to. You typically set this time fence to the cumulative lead time of the item.
- When the system generates messages, any message for an order with a start date that is equal to or less than the planning time fence receives a status code of *Before Planning Time Fence* in the appropriate review page in PeopleSoft Manufacturing, PeopleSoft Inventory, or PeopleSoft Purchasing. This alerts you to changes occurring early in the planning horizon that can be difficult to react to.
- Action Message Cutoff [days]** Tells the Receive Planning Messages process to stop creating action messages. The system generates recommendations for new orders only after this time fence. It does not generate recommendations for cancellations or reschedules.
- When the system generates messages for new orders, any message for a planned order with a start date that is greater than the cutoff time fence receives a status code of *After Cutoff Fence*.
- PeopleSoft Supply Planning uses message filters to reduce the number of planning system messages that require review in PeopleSoft Manufacturing, PeopleSoft Inventory, PeopleSoft Purchasing, and PeopleSoft Order Management. Each filter has a set tolerance that tells the system whether the message is automatically approved.
- Reschedule In Factor [days] and Reschedule Out Factor [days]** Set tolerances for recommendations to move an order. For example, if you set both factors to 5 and the production date is December 10, then planning automatically approves any order between the reschedule in date of December 5 and the reschedule out date of December 15 without going to the appropriate review page. This applies only if the change is a reschedule.

|                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Safety Stock Level</b>     | Enter the quantity of the item that you keep on hand to buffer against stock outages. If you want to change the safety stock level from period to period, you can set up a time-phased safety stock level on the Stocking Periods page in the Define Controls menu. PeopleSoft Supply Planning always uses the Stocking Period record first. If no record exists there, then the system uses the static quantity that you enter in the Define Business Unit Item Planning: Order Modifiers page..                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Excess Stock Level</b>     | The upper limit that you place on the quantity of the item to buffer against overstocking. You can also define excess stock levels (along with safety stock) on the Stocking Periods page.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Fixed Period [days]</b>    | Determines how far the system looks ahead for demand as you determine the amount of supply that is required during the creation of a new supply order. PeopleSoft Supply Planning uses this value when generating all supply (production, purchase, and transfer). When using the fixed period value, the system respects the order modifiers (minimums, maximums, and multiples) that are defined when you use the Define Business Unit Item - Planning: Order Modifiers page.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Use Global Early Fence</b> | Select to indicate that the system will use the early fence value that is defined on the Load Planning Instance component.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Early Fence</b>            | Enter a number of days (negative or positive) that will be used from any planning date to determine a boundary before which planning solvers make no changes to supply or demand tasks. For example, if the current planning date is January 15, 2000 and the early fence is set to 2, then the planning solver will make no changes to supply or demand tasks before January 17, 2000.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Production Lead Times</b>  | If you don't define any lead times, the PeopleSoft Supply Planning models both expect either an enterprise routing or a production routing, respectively, to exist in order to define the run rates when planning production.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>New Order Fence</b>        | <p>Define how the system uses the order start date to assign statuses to planned production orders that are received from a planning engine session. If you leave both fields in this group box blank, the system assigns the entered status to all new planned orders.</p> <p>To create all planned orders in the <i>Released</i> status, you can enter a value of 999 for the Released Order fence field and leave the Firm Order fence field blank. Alternatively, to create all planned orders in the firm status, enter a value of 999 in the Firm Order fence field and leave the Released Order fence field blank.</p> <p>If you enter a value in the Released Order fence field and nothing in the Firm Order fence field, then all the planned orders that are between the day that you run the Receive Planning Messages process and the released order fence days are created in the <i>Released</i> status. The planned orders that are scheduled after that day are created in the <i>Entered</i> status.</p> <p>When you review planning messages by using one of the planning message pages, the system determines the status of new planned orders based on these fences that are defined for the items. You can change the status during the planning message review process.</p> |

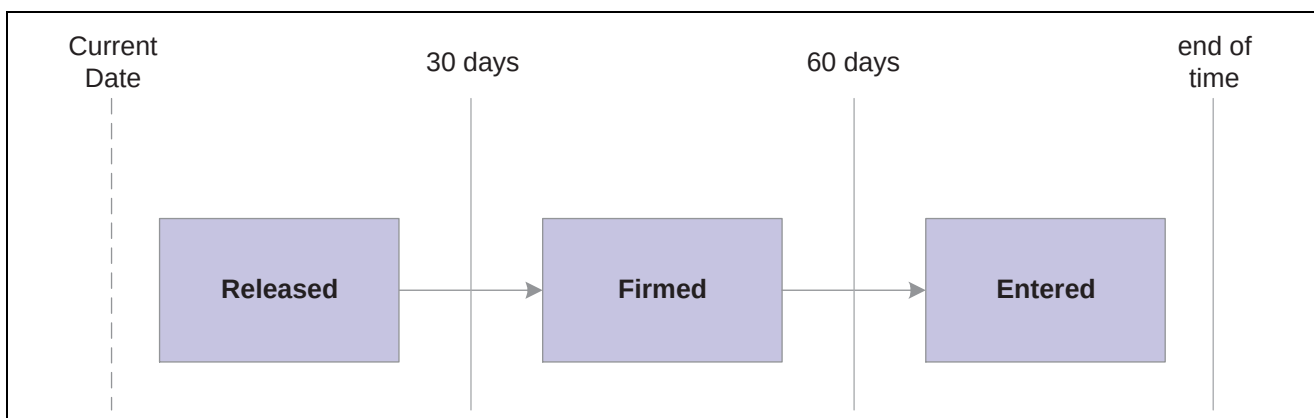
**Released Order**

Indicates the number of days from the current date that the system sets planned orders to the *Released* status when planning messages are received, reviewed, and applied.

**Firmed Order**

Enter the number of days that represents planned orders that are created in the *Firmed* status. The system creates all planned orders that are scheduled after the firmed order fence in the *Entered* status.

This diagram illustrates time fences for new orders:



New order fence example

Suppose that you set a released order fence of 30 days and a firmed order fence of 60 days; then the system creates all new planned orders with start dates that are between the current date and 30 days in the future as *Released*. The system creates all planned orders with start dates that are between 31 and 60 days as *Firmed*, and all planned orders beyond 60 days as *Entered*.

## Defining Item Forecast Parameters

Access the Define Business Unit Item - Planning: Forecast page.

|         |           |             |               |          |               |        |
|---------|-----------|-------------|---------------|----------|---------------|--------|
| General | Inventory | Substitutes | Manufacturing | Planning | Configuration | Custom |
|---------|-----------|-------------|---------------|----------|---------------|--------|

|                         |                                  |          |                                 |
|-------------------------|----------------------------------|----------|---------------------------------|
| <a href="#">General</a> | <a href="#">Fences/Lead Time</a> | Forecast | <a href="#">Order Modifiers</a> |
|-------------------------|----------------------------------|----------|---------------------------------|

|                        |       |                 |        |                                  |    |
|------------------------|-------|-----------------|--------|----------------------------------|----|
| <b>Unit:</b>           | US008 | <b>Item ID:</b> | SR1001 | <b>Standard Unit of Measure:</b> | EA |
| Omega 500 Touring Bike |       |                 |        |                                  |    |

---

|                                                                                                                                                                                      |                                                                                                 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|
| <b>Forecaster:</b>                                                                                                                                                                   | UNITEDST       |
| <b>UOM Group</b>                                                                                                                                                                     |                |
| <b>Demand Time Fence [days]:</b>                                                                                                                                                     | 45.00                                                                                           |
| <b>Forecast Adjustment Action:</b>                                                                                                                                                   | No Adjustment  |
| <b>Forecast Fulfillment Size:</b>                                                                                                                                                    |                |
| <input type="checkbox"/> Explode Demand for Consumption<br><input type="checkbox"/> Aggregate Demand                                                                                 |                                                                                                 |
| <b>Forecast Consumption Method</b>                                                                                                                                                   |                                                                                                 |
| <input type="checkbox"/> Sales <input type="checkbox"/> Production <input type="checkbox"/> Stock Request<br><input type="checkbox"/> Transfer <input type="checkbox"/> Extra Demand |                                                                                                 |

Define Business Unit Item - Planning: Forecast page

- Forecaster** Enables you to restrict, or segment, the demand data extracts to these item-forecaster records for PeopleSoft Demand Planning. You define forecasters by using the Forecaster page accessed from the Demand Planning - Demand Parameters - Set Forecaster Defaults menu item.
- UOM Group** Select the UOM Group that determines the type of measurement for this item. PeopleSoft Inventory Policy Planning uses the group to correlate different units of measure so that the system produces a single standard UOM output for a specified UOM group. You use UOM groups for informational purposes so that you can associate units of measure with certain quantities.
- Demand Time Fence [days]** Manages forecast consumption in the planning process. The demand time fence days is often set to the finishing lead time for an item, based on the current system date plus the demand time fence for the item. Before the demand time fence, forecast is ignored: only actual orders are used as demand. After the demand time fence, the greater of actual orders or forecast consumption is used as demand.
- Forecast Adjustment Action** Select an action to indicate how the forecast is allocated for PeopleSoft Supply Planning. Forecast adjustment alters the quantity of the next forecast planning bucket quantity to match the known actual demand. This is done by taking the unconsumed forecast from before the demand fence and prorating the unconsumed forecast to periods after the demand fence. Various actions are available to control how the unconsumed forecast is to be prorated.
- Forecast Fulfillment Size** Define the numerical value that you want to use when dividing the total forecast demand into portions that make up task quantities. The PeopleSoft Supply Planning application uses the fulfillment size when it attempts to meet certain portions of the forecast if the total forecast cannot be met entirely. The system divides net forecasts into tasks that are associated with the original

planning period, and each task represents a portion of the quantity that is required to meet the forecasted demand. These tasks represent the movable portions of a forecast when you make a feasible plan and allow the system to reschedule top-level demand.

### **Explode Demand for Consumption**

Select this option if you use:

- PeopleSoft Supply Planning and you want to explode sales order demand or transfer demand for forecast consumption at the inventory item level.

If production demand forecasts exist, the system explodes sales order demand or transfer demand for some end items by calculating the production demand that is to be used for forecast consumption. If you do not select the check box, the system doesn't explode the sales orders or transfer orders for the item.

- PeopleSoft Supply Planning and you want to explode sales order demand for forecast consumption at the inventory item level.

If production demand forecasts or transfer demand forecasts exist, the system explodes sales order demand for some end items by calculating the production demand or transfer demand that is to be used for forecast consumption. If you do not select the check box, then the system doesn't explode the sales orders for the item.

### **Aggregate Demand**

Identifies the item as representing a group of items for forecast consumption. For an aggregate demand item, you establish aggregate demand children. The forecast for the aggregate demand children is rolled up to one demand total for the aggregate demand item. Forecast consumption is then performed at the aggregate-item level rather than at the individual-item level. You can identify both planning items and inventory items as aggregate demand items.

### **Forecast Consumption Method**

Select the types of demand that PeopleSoft Supply Planning will use to consume the forecast.

## **Defining Order Modifiers for Planning**

Access the Define Business Unit Item - Planning: Order Modifiers page.

| General                                                                                           | Inventory | Substitutes                         | Manufacturing | Planning                     | Configuration | Custom |
|---------------------------------------------------------------------------------------------------|-----------|-------------------------------------|---------------|------------------------------|---------------|--------|
| <a href="#">General</a> <a href="#">Fences/Lead Time</a> <a href="#">Forecast</a> Order Modifiers |           |                                     |               |                              |               |        |
| Unit: US008                                                                                       |           | Item ID: SR1001                     |               | Standard Unit of Measure: EA |               |        |
| Omega 500 Touring Bike                                                                            |           |                                     |               |                              |               |        |
| <b>Transfer Attribute</b>                                                                         |           |                                     |               |                              |               |        |
| Order Modifier <input type="checkbox"/>                                                           |           | Transfer Yield: 100.0               |               |                              |               |        |
| Min Order Qty: <input type="text"/>                                                               |           | Max Order Qty: <input type="text"/> |               | Order Multiple: 1.0000       |               |        |
| <b>Purchase Attribute</b>                                                                         |           |                                     |               |                              |               |        |
| Order Modifier <input type="checkbox"/>                                                           |           | Purchase Yield: 100.0               |               |                              |               |        |
| Min Order Qty: <input type="text"/>                                                               |           | Max Order Qty: <input type="text"/> |               | Order Multiple: 1.0000       |               |        |
| <b>Manufacturing Attribute</b>                                                                    |           |                                     |               |                              |               |        |
| Order Modifier <input type="checkbox"/>                                                           |           |                                     |               |                              |               |        |
| Min Order Qty: <input type="text"/>                                                               |           | Max Order Qty: <input type="text"/> |               | Order Multiple: 1.0000       |               |        |

Define Business Unit Item – Planning: Order Modifiers page

**Transfer Attribute**

Transfer order modifiers that you enter are used as defaults on the Inventory Transfer Attributes pages that establish relationships between business units (destination and sourcing) and items. Order modifiers on the Inventory Transfer Attributes pages take precedence over order modifiers that are defined at the item level.

**Transfer Yield and Purchase Yield**

Enter the usable output, expressed as a percentage. This is used in planning to inflate the planned quantity on transfers or production orders to account for any loss that may occur during transport or production. For example, if you're expecting the yield of quality items from a transfer to be 90 percent of the delivered items and you need 90 items, then you should order 100 items to fulfill requirements.

## Defining Business Unit Attributes for Configured Items

Access the Define Business Unit Item - Configuration page.

| General                                                                            | Inventory | Substitutes | Manufacturing | Planning                                               | Configuration | Custom |
|------------------------------------------------------------------------------------|-----------|-------------|---------------|--------------------------------------------------------|---------------|--------|
| Unit: US008 Item ID: LT5011 Standard Unit of Measure: EA                           |           |             |               |                                                        |               |        |
| Custom Road Bicycle Wheel                                                          |           |             |               |                                                        |               |        |
| <b>Rules Attributes - Components</b>                                               |           |             |               | <b>Additional Attributes</b>                           |               |        |
| <input checked="" type="radio"/> Rule Based <input type="radio"/> Standard BOM     |           |             |               | MFG Business Unit: <input type="text"/>                |               |        |
| Reference BOM Item: <input type="text"/>                                           |           |             |               | Ship Via: <input type="text"/>                         |               |        |
| <b>Rules Attributes - Operations</b>                                               |           |             |               | Configuration Lead Time Hrs: <input type="text"/> 0.00 |               |        |
| <input checked="" type="radio"/> Rule Based <input type="radio"/> Standard Routing |           |             |               |                                                        |               |        |

Define Business Unit Item – Configuration page

## Rules Attributes - Components

|                           |                                                                                                                                                                                                                                                                                                                                                                                                          |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Rule Based</b>         | Indicates the component lists for production IDs that are based on component list rules that are carried out during production configuration. If a standard BOM exists for the item, the system doesn't use it to create production; the system includes only components that are identified by component list rules with the production ID.                                                             |
|                           | <hr/> <b>Note.</b> When you select this option, create at least one component list rule for that item. <hr/>                                                                                                                                                                                                                                                                                             |
| <b>Standard BOM</b>       | Indicates the component lists for production IDs that are based on predefined standard BOMs. The system includes all components on the BOM on the component list for the production ID. The system might encounter a component list rule during the production configuration process. If the system interprets the condition for the rule as true, it includes the component list with the standard BOM. |
| <b>Reference BOM Item</b> | Enter an item whose BOM you want to use when the system produces this item. When you enter a value, the system ignores the current item's BOM. Use this field only for components that are based on a standard BOM. When the system uses components that are based on a standard BOM, it includes all components from the BOM for this item in the component list for the production ID.                 |

## Additional Attributes

|                                                                       |                                                                                                                                                                                                                                                   |
|-----------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>MFG Business Unit</b>                                              | Enter business unit attributes; otherwise, the configuration process uses the setID values. The system uses business unit attributes to point to the business unit that produces the item and in distribution sites that do not produce the item. |
| <b>Ship Via</b>                                                       | Identifies the method of moving configured items between business units. This code identifies lead times to take into consideration for lower-level configured items that are manufactured in separate business units.                            |
| <b>Configuration Lead Time Hrs</b> (configuration lead time in hours) | Enter the average production time that is required for manufacturing the configured item. The production configuration process uses this lead time field to determine estimated start and due dates for production IDs.                           |

## Rules Attributes - Operations

|                         |                                                                                                                                                                                                                                     |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Rule Based</b>       | Indicates to use operation lists for production IDs based on Operation List rules. Rules identify which routing operations to use from predefined routings. You do not need to use all operation sequences on the standard routing. |
|                         | <hr/> <b>Note.</b> Whether you use rule-based or standard routing, you must set up a routing. Rule-based routing enables the selection of steps to use. <hr/>                                                                       |
| <b>Standard Routing</b> | Indicates to use operations that generate operation lists based on standard predefined routings. The production ID's operation list includes all operation sequences on the standard routing.                                       |

## Processing Items with BOMs and Component Lists

PeopleSoft Product Configurator enables you to process a standard BOM and a component list rule when an item is in production.

To process an item with a BOM and a component list rule:

1. Create a standard BOM for the item on the BOM Maintenance page (Manufacturing, Maintaining Bills of Materials).
2. Select the Standard BOM option, and then include the reference BOM item on the Define Business Unit Item - Configuration page.

The reference BOM refers to BOMs that you create for the item in step 1. To review this BOM, select the item ID on the BOM Maintenance page.

3. Create a component list for the item on the Component List page, and then add the component list to the production model for the item on the Model page.

Materials from the standard BOM that you create in step 1 and from the component list that you create in step 3 are now associated with the item.

To verify that the setup is correct:

1. Create a configured direct order for the item on the Configuration Orders page.
2. Order the item by using the Order Entry Form page, and then configure the item on the Order Entry Form - Configuration page.
3. Run a production request for the item on the Production Request page.
4. Obtain the production ID for the item on the Direct Production page.
5. Enter the production ID that you obtain in step 4 and the business unit on the Component List Maintenance page, and then click the Search button.

A list of components for the item appears.

6. Verify that the list of components includes materials from the standard BOM and the component list rule.

### See Also

*PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, “Using Configuration Rule Actions,” Defining Production Rules

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## Assigning Serial Numbers Automatically

This section discusses how to assign serial numbers automatically.

### Understanding how to Assign Serial Numbers Automatically

To assign serial numbers automatically, use the Automatic Serial Numbers (AUTO\_SERIAL\_NUM\_GBL) component. Use the AUTO\_SERIAL\_NUM\_CI component interface to load data into the tables for this component

When you assign serial numbers to items on a regular basis, you can streamline the data-entry process by establishing default automatic-numbering rules. If the installation includes PeopleSoft Purchasing or PeopleSoft Manufacturing, you can use this default information to assign serial numbers for items that are received in inventory or for completed assemblies that are being moved to another production area.

## Page Used to Assign Serial Numbers Automatically

| Page Name                | Object Name     | Navigation                                                   | Usage                                                     |
|--------------------------|-----------------|--------------------------------------------------------------|-----------------------------------------------------------|
| Automatic Serial Numbers | AUTO_SERIAL_NUM | Items, Define Items and Attributes, Automatic Serial Numbers | Define criteria to automatically generate serial numbers. |

## Defining Criteria to Automatically Generate Serial Numbers

Access the Automatic Serial Numbers page.

---

**Note.** If you do not define defaults by using this page, you can enter the information manually while receiving items or recording assembly completions.

---

**Last Serial Number** If you are generating shipping serial labels, the value in this field is updated by PeopleSoft Inventory. If you use PeopleSoft Manufacturing, the Completions process does not update this field.

**Zero Pad** Select this option if you want to use zeros as placeholders for the serial number length that you define.

### See Also

*PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook*, “Designing an Electronic Data Collection System”

*PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, “Completing Operations and Recording Scrap,” Generating Serial Numbers



## CHAPTER 6

# Loading Items

This chapter provides overviews of item loading, staged item maintenance, item price list and item master enterprise integration points (EIPs), and Item Loader data flow and discusses how to:

- Set up the item price list EIP.
- Load items and prices using the item price list EIP.
- Set up the item master EIP.
- Load staged item data using the item master EIP.
- Send outbound item data with the Item Loader process.
- Edit data errors in the Item Loader staging tables.
- Use the excel to component interface utility.

---

## Understanding Item Loading

Several ways are available to update the master data tables with inbound data to the item master. These data loads enable you to update or add items, change pricing, update potential vendors for each item, and change item attributes. You can add or update item data by using these options:

- The Item Price List and Item Master EIPs.
- A Microsoft Excel spreadsheet with the PeopleTools Excel to component interface utility.
- MarketPlace item updates using the MarketSite CUP file.
- The PeopleSoft eProcurement xCBL interface.
- Cohera product loads.
- Group purchase order (GPO) contract interface.

Each option enables you to load data into staging tables before loading the item data into master data tables. While the data is in the staging tables, validation and error correction can be completed. You can use Workflow to notify you when items do not load into the item master tables. You can view and correct data loads by using the Data Definition Maintenance component.

After the items have been loaded into the master data tables, you can change several items at the same time by using the Catalog Maintenance Extract (PO\_EXPORT\_CRITERIA) process. This process enables you to download items from master data tables to the Item Loader staging tables, where you can alter the items using the Catalog Maintenance Update (PO\_MASS\_UPDATE) process or the Data Definition Maintenance (IN\_EIP\_ITEM\_MAINT) component.

---

**Note.** This chapter does not discuss the Cohera product load, GPO contract interface, or catalog maintenance extract.

---

### See Also

Chapter 7, “Using Item Catalog Maintenance,” page 151

*PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, “Using PeopleSoft eProcurement with a Marketplace”

*PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, “Importing and Searching Supplier Catalogs”

*PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, “Importing and Searching Supplier Catalogs,” Loading Catalog Management Catalogs into PeopleSoft eProcurement

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## Understanding Staged Item Maintenance

The PeopleSoft system provides tools to import and maintain item catalog data. The Item Loader feature enables you to import item catalog data into staging tables, where you can manipulate item information by using the Item Loader Data Maintenance pages before loading the data into the master data tables.

The Item Loader feature supports two business processes for updating the master data tables with item data that is staged by third-party applications. These business processes enable you to:

- Import item price data that is received from vendors.
- Import item data to synchronize item records with those on a third-party system.

For both business processes, the Staged Item Load process (IN\_ITMLOAD) validates item data in staging tables and updates the master data tables with the valid records. Records with invalid data remain in the staging tables, and you can correct them online using the item Data Definition Maintenance component.

---

**Note.** While an item exists in the item staging tables, any changes that are made to the item in the master item data are overwritten when you run the Item Loader process.

---

### See Also

Chapter 7, “Using Item Catalog Maintenance,” Understanding Item Catalog Maintenance, page 151

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## Understanding Item Price List and Item Master Enterprise Integration Points

The Item Price List EIP enables you to receive item price data from third-party sources. The third-party source sends the item price data using a flat file or an XML based service operation to load data into the item price list staging tables. A third-party system can send item price information using the ITEM\_PRICELIST\_LOAD service operation in the ITEM\_CATALOG\_PRICE queue.

The `Item_PriceList_Load` service operation is specific to loading vendor items. You cannot create an item without providing a vendor using this feature. If the price that is sent by the vendor is for the same unit of measure, currency code, and date as the one that exists in the system, the price will be updated. If any of these attributes are different, the price will be inserted as a new effective-dated row. In the event that the vendor does not provide the date, the `Item_PriceList_Load` service operation will use the system date.

The Item Master EIPs enable you to send and receive item master data to and from third-party sources. The third-party system sends the item master data using an XML based service operation to load data into the item loader staging tables. You can send item master data to a third-party system using the `ITEM_SYNC`, `ITEM_SYNC_EFF`, `ITEM_FULLSYNC`, or `ITEM_FULLSYNC_EFF` service operation in the `ITEM_MAINTENANCE` queue. A third-party system can send item master information using the `ITEM_SYNC` or `ITEM_FULLSYNC` service operation in the `ITEM_MAINTENANCE` queue.

Item records that are received through the item master EIPs are staged directly in the Item Loader staging tables. No intermediate staging or processing is required. Additionally, you can specify whether the Item Loader process should be launched automatically or manually as part of the item master EIP setup.

To set up the Item Loader process to start automatically as a part of the item master EIP setup:

1. Access the Enterprise Components - Data Maintenance Utility Setup component.
2. Select a transaction type of *Item*.
3. Select the Flag 1 option to automatically start the Item Loader process for the item records in each item master service operation that is received.

If the Flag 1 option is not selected, the new item records are inserted in the Item Loader staging tables, and you must start the Item Loader process manually to update the master data tables.

## See Also

Chapter 6, “Loading Items,” Loading Items and Prices Using the Item Price List EIP, page 133

Chapter 6, “Loading Items,” Understanding Item Loader Data Flow, page 131

*Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*

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

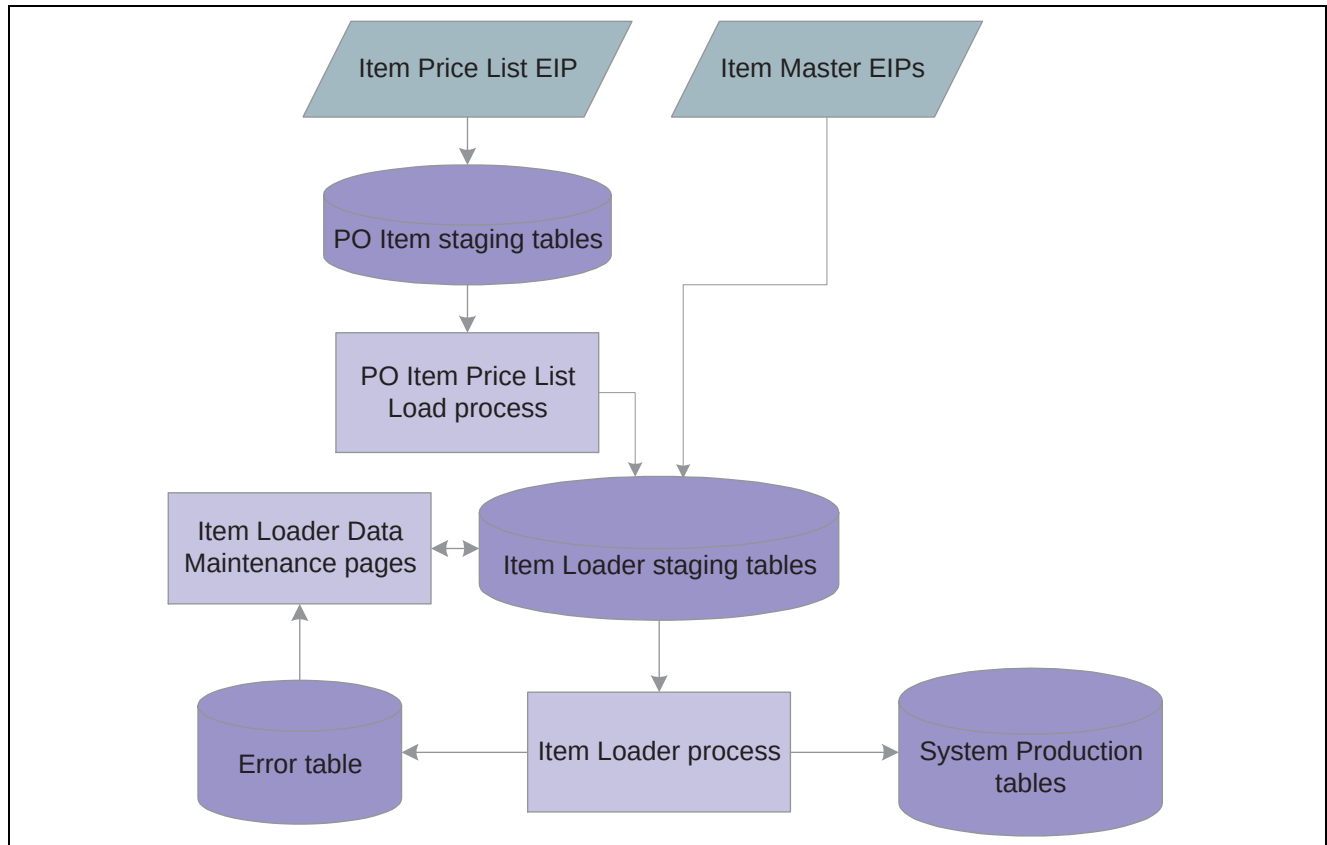
[http://www.peoplesoft.com/corp/en/products/technology/oif/eip\\_catalog.jsp](http://www.peoplesoft.com/corp/en/products/technology/oif/eip_catalog.jsp)

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## Understanding Item Loader Data Flow

The following diagram shows the data flow of the Item Loader process. The Item Price List and Item Master EIPs provide the mechanisms for populating the Item Loader staging tables.

This diagram illustrates how the Item Loader process acts on the Item Loader staging tables to load item data to the PeopleSoft system master data tables:



Item Loader process flow

**See Also**

Chapter 6, “Loading Items,” Running the Item Price List Load Application Engine Process, page 134

Chapter 6, “Loading Items,” Running the Item Loader Process, page 136

Chapter 6, “Loading Items,” Editing Data Errors in the Item Loader Staging Tables, page 140

[http://www.peoplesoft.com/corp/en/products/technology/oif/eip\\_catalog.jsp](http://www.peoplesoft.com/corp/en/products/technology/oif/eip_catalog.jsp)

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## Setting Up the Item Price List EIP

The Item Price List EIP is an asynchronous inbound service operation that receives price lists information from a third-party system.

**Enabling the Item Price List EIP**

PeopleSoft delivers the service operations in PeopleSoft Integration Broker with a default status of *Inactive*. You must activate each service operation before attempting to send or receive data from a third-party source or another PeopleSoft system, such as CRM. To set up this service operation:

1. Setup within the PeopleSoft Inventory application:  
For this service operation, there is no application-specific setup.
2. Setup within PeopleSoft Integration Broker and Enterprise Components:

Use the information in the following table and refer to the setup instruction in the PeopleSoft Supply Chain Management Integrations 9.0 PeopleBook, “Implementing Integrations” chapter, Setting Up Service Operations section.

| Service Operation   | Direction and Type      | Handlers          | Chunking Available? | Integrates With    |
|---------------------|-------------------------|-------------------|---------------------|--------------------|
| ITEM_PRICELIST_LOAD | Inbound<br>Asynchronous | ItemPriceListLoad | No                  | third-party system |

### See Also

*PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook*, “Implementing Integrations,” Setting Up Service Operations

*Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*

---

## Loading Items and Prices Using the Item Price List EIP

This section discusses how to load item price list data from a message or flat file to the item loader staging tables by using the Item Price List Load (RUN\_PO\_ITMLOAD) process. The new item records are inserted in the Item Loader staging tables with a *Hold* status.

This section discusses how to:

1. Process the XML message (Item\_PriceList\_Load) or a flat file (PRICELIST).
2. Run the Item Price List Load application engine process (PO\_ITMLOAD).
3. Run the Item Loader process (IN\_ITMLOAD).
4. Review errors.

### See Also

Chapter 6, “Loading Items,” Editing Data Errors in the Item Loader Staging Tables, page 140

## Pages Used to Load Items and Prices Using the Item Price List EIP

| Page Name            | Object Name    | Navigation                                                                                      | Usage                                                                                                                                                            |
|----------------------|----------------|-------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Inbound File Publish | EO_FILETOMSG   | Enterprise Components, Integration Definitions, Initiate Processes, Inbound File Publish        | Run the Inbound File Publish process to transfer data that is on a flat file into the item price list load staging tables.                                       |
| Item Price List      | RUN_PO_ITMLOAD | SCM Integrations, Process Transactions, Items, Item Price List Batch Load, Item Price List Load | Run the item price list load application engine process to specify the parameters for the PO Item Price List Load (purchase order item price list load) process. |

## Processing the Item\_PriceList\_Load Message or Flat File

Access the Inbound File Publish process page.

Inbound File Publish process page

Transactions are processed automatically. You must load flat files using the Inbound File Publish page. Item data is placed into the item price list staging tables (ITM\_LOAD\_MST\_EC, ITM\_LOAD\_INV\_EC, ITM\_LOAD\_PUR\_EC, and ITM\_LOAD\_VND\_EC).

## Running the Item Price List Load Application Engine Process

Access the Item Price List page.

Item Price List page

Use the Item Price List Load process (PO\_ITMLOAD) to add system default values to the item definitions and move the items from the item price list staging tables to the item loader staging tables. The new item records are inserted in the item loader staging tables with a status of *New*.

## Stage Loader Parameters

|                          |                                                                                                                                                                                                                            |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>All SetID</b>         | Select to load item records with any setID attribute. If you do not select this check box, enter a value in the SetID field to restrict the loading process to a specific setID.                                           |
| <b>All Vendors</b>       | Select to load item records with any vendor attributes. If you do not select this check box, enter values in the Vendor Set ID and Vendor ID fields to restrict the loading process to a specific vendor set ID or vendor. |
| <b>All Manufacturers</b> | Select to load items with any manufacturer attribute. If you do not select this check box, enter a value in the Manufacturer ID field to restrict the loading process to a specific manufacturer ID.                       |

**Note.** If the system does not find the manufacturer attributes that are associated with imported item data in the Manufacturer table (MANUFACTURER), it creates a new manufacturer.

## Other Options

|                                                                           |                                                                                                                                                                                 |
|---------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Purchasing Dflts From Category</b> (purchasing defaults from category) | Select to use the item category defaults that you established in the Item Categories (CATEGORY_TBL) component when creating the Purchasing Item Attributes segment of the item. |
| <b>Delete Loaded Items</b>                                                | Select to delete item records from the item price list staging tables as they are copied to the item loader staging tables. This enables you to work with                       |

smaller batches of item information by running the Item Price List Load process several times against the same item price list load staging tables until all records in the tables have been processed. To keep the data in the staging tables for audit purposes, do not select this check box.

|                                                    |                                                                                                                             |
|----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| <b>Auto Assign ID</b><br>(automatically assign ID) | Select the method by which the process assigns item IDs: <i>For All New Items</i> or <i>When Item ID is not specified</i> . |
| <b>Default Item Setid</b>                          | Select the setID that you want assigned to the loaded items if the item setID has not already been provided.                |
| <b>Default Vendor Setid</b>                        | Select the setID that you want assigned to the loaded items if the item vendor setID has not already been provided.         |

### See Also

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

## Running the Item Loader Process

Run the item loader process (IN\_ITMLOAD) to validate and transfer the item data into the PeopleSoft master data tables.

### See Also

Chapter 6, “Loading Items,” Loading Staged Item Data Using the Item Master EIP, page 137

## Reviewing Errors

Use the Data Definition Maintenance page to review any errors that did not pass the validation portion of the Item Loader process.

### See Also

Chapter 6, “Loading Items,” Editing Data Errors in the Item Loader Staging Tables, page 140

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## Setting Up the Item Master EIP

The Item Master EIPs include four XML-based service operations defined in PeopleSoft Integration Broker: ITEM\_SYNC, ITEM\_SYNC\_EFF, ITEM\_FULLSYNC, and ITEM\_FULLSYNC\_EFF. Activate the ITEM\_SYNC service operation to send incremental updates automatically as item information is updated online or by using the Change Item Status process (INS4000), Item Loader process (IN\_ITMLOAD), or Publish Outbound Message process. Activate the ITEM\_FULLSYNC service operation to perform full data replication by scheduling a batch process using the Full Data Publish utility. This process generates an outbound transaction containing item information.

If you are sending item data to a third-party system that cannot process effective-dated rows, activate the \_EFF version of either the ITEM\_SYNC or ITEM\_FULLSYNC service operations. When you send item updates by using the \_EFF service operations, future-dated segments of the data are removed from the outbound transaction and sent when the effective date equals the current date.

## Enabling the Item Master EIPs

PeopleSoft delivers the service operations in PeopleSoft Integration Broker with a default status of *Inactive*. You must activate each service operation before attempting to send or receive data from a third-party source or another PeopleSoft system, such as CRM. To set up this service operation:

1. Setup within the PeopleSoft application:

For these service operations, there is no application-specific setup.

2. Setup within PeopleSoft Integration Broker and Enterprise Components:

Use the information in the following table and refer to the setup instruction in the PeopleSoft Supply Chain Management Integrations 9.0 PeopleBook, “Implementing Integrations” chapter, Setting Up Service Operations section.

| Service Operation | Direction and Type                   | Handlers                                  | Chunking Available? | Integrates With    |
|-------------------|--------------------------------------|-------------------------------------------|---------------------|--------------------|
| ITEM_SYNC         | Outbound and Inbound<br>Asynchronous | ItemSync<br>ItemSyncEff<br>ROUTERSENDHDLR | Yes                 | Third-party system |
| ITEM_SYNC_EFF     | Outbound<br>Asynchronous             | ROUTERSENDHDLR                            | Yes                 | Third-party system |
| ITEM_FULLSYNC     | Outbound and Inbound<br>Asynchronous | ItemFullSync<br>ROUTERSENDHDLR            | Yes                 | Third-party system |
| ITEM_FULLSYNC_EFF | Outbound<br>Asynchronous             | ROUTERSENDHDLR                            | Yes                 | Third-party system |

### See Also

*PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook*, “Implementing Integrations,” Setting Up Service Operations

*Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*

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## Loading Staged Item Data Using the Item Master EIP

This section discusses how to run the Item Loader process.

To load item master data by using an item master EIP:

1. Process the item data.

A third-party system can send item data using these Item Master EIPs:

- ITEM\_SYNC

- ITEM\_FULLSYNC
- 2. Run the Item Loader process (IN\_ITMLOAD) either manually or from the subscription process.
- 3. Review errors.

### See Also

Chapter 6, “Loading Items,” Editing Data Errors in the Item Loader Staging Tables, page 140

## Page Used to Load Staged Item Data Using the Item Master EIP

| Page Name   | Object Name    | Navigation                                                 | Usage                                                                                                                        |
|-------------|----------------|------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|
| Item Loader | RUN_IN_ITMLOAD | SCM Integrations, Process Transactions, Items, Item Loader | Run the Item Loader process to validate data in the Item Loader staging tables and update the PeopleSoft master data tables. |

## Running the Item Loader Process

Access the Item Loader page.

Using the parameters that are defined on the Item Loader page, the Item Loader process:

- Validates the item records in the Item Loader staging tables.
- Logs any errors that it finds.
- Updates the master data tables with the valid item data.

Records with invalid data remain in the Item Loader staging tables with an *Error* status. You can edit them online by using the Data Definition Maintenance pages.

After correcting the data errors, you can rerun the Item Loader process to populate the master data tables with the corrected item records.

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**Note.** If you anticipate receiving large numbers of item records, manually schedule the Item Loader process to avoid peak processing times.

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**Warning!** Use extreme care when updating the master data tables, especially when modifying existing item data. The Item Loader process cannot be reversed.

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### Item Loader Parameters

#### Item Load Type

Select the staging source of the records in the Item Loader staging tables that you want to load to the master data tables:

*Item Export:* Select to process item data that is extracted to the staging tables by the Catalog Maintenance Extract process.

*Item Fullsync:* Select to process item data that is staged with the Item Master service operation ITEM\_FULLSYNC.

*Item Load From Excel:* Select to process item data that is staged with the Excel interface.

*Item MfgGPO*: Select to process item data that is staged with the GPO Load service operation ITEM\_MFG\_GPO\_LOAD.

*Item Pricelist*: Select to process item data that is staged with the Item Price List service operation ITEM\_PRICELIST\_LOAD. Select this option to load item and price data from PeopleSoft eProcurement staging tables including CUP and xCBL files.

*Item Sync*: Select to process item data that is staged with the Item Master service operation ITEM\_SYNC.

**All Item SetIDs**

Select to load item records with any setID attribute. If you do not select this check box, enter a value in the SetID field to restrict the loading process to a specific setID. This field is not available when you select *Item Export* in the Item Load Type field.

**All EIP\_CTL\_IDs**

Select to load item records with any EIP control ID attribute that is associated with the transaction that is specified in the Item Load Type field. If you do not select this check box, specify a range of EIP control IDs in the From and To fields.

**All Message Instances**

Select to load item records with any publication information that is associated with the transaction that is specified in the Item Load Type field. If you do not select this check box, then you should specify a publication node and ID.

**Market Code**

Select the type of market codes to use for the loaded items: *User Defined* or *UN/SPSC* (United Nations Standard Product and Services Codes). Use the Item Categories component to establish user-defined market codes.

**Purge Cancelled Transactions**

Select to purge item records that are marked for cancellation in the staging table. The records that are selected for purge must also meet the other criteria that you have set for the process.

**Only Run Validation portion**

Select to run only the data validation portion of the process. This feature enables you to check the data for errors before updating the master data tables. Correct any errors by using the Data Definition Maintenance pages.

**Re-process any Errors in Range**

Select to reprocess any item records in error that meet the criteria that you have set for the process.

**Re-process any Hold in Range**

Select to reprocess any item records with a *Hold* status that meet the criteria that you have set for the process.

---

**Note.** You must select the Re-process any Hold in Range check box to process item records that are staged with the Item Price List service operation ITEM\_PRICELIST\_LOAD. This is because when the item Price List Load process loads Item Price List EIP data to the item loader staging tables, it inserts new item records with a *Hold* status.

---

**Update Standard Price**

Select to update standard prices when an item/vendor UOM (unit of measurement) price record is loaded. This field is available only if *Item Pricelist* is selected in the Item Load Type field. Future effective-dated prices will not go into effect until the Item Price List Batch Load (PO\_ITMLOAD) process is run on or after the effective date.

**Update Business Unit Price**

Select to update standard prices for the business unit when an item/vendor UOM price record is loaded. This field is available only if *Item Pricelist* is

selected in the Item Load Type field. If the *Item Pricelist* field is selected, the new price is applied to all business units that match the setID and item combination and that have the Business Unit Update Price check box selected on the BU Specific Attributes (business unit specific attributes) page. Future effective-dated prices won't go into effect until the Price Update process is run on or after the effective date.

### See Also

Chapter 6, "Loading Items," Editing Data Errors in the Item Loader Staging Tables, page 140

*PeopleSoft Enterprise Source to Settle Common Information 9.0 PeopleBook*, "Using Group Purchasing Organizations"

Chapter 7, "Using Item Catalog Maintenance," Extracting Item Data, page 158

*PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Defining Purchasing Item Information," Running the Price Update Process

[http://www.peoplesoft.com/corp/en/products/technology/oif/eip/eip\\_catalog.jsp](http://www.peoplesoft.com/corp/en/products/technology/oif/eip/eip_catalog.jsp)

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## Sending Outbound Item Data with the Item Loader Process

In addition to updating the master data tables with inbound item master data, you can set the Item Loader process to publish item data using an Item Master EIP as part of each processing run. The outbound transaction contains the item data that was used to update the PeopleSoft master data tables. Third-party applications that need to synchronize their table records with the PeopleSoft application records can subscribe to this service operation.

To publish (send) an outbound transaction from the Item Loader process, use the Batch Publish Rules component to activate the IN\_ITMLOAD batch publish rule for the ITEM\_SYNC message.

### See Also

*PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, "Using the Effective Date Publish Utility"

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## Editing Data Errors in the Item Loader Staging Tables

View and modify the item data that is staged in the Item Loader staging tables by using the Data Definition Maintenance component. The Item Loader process flags any records with data errors that have an *Error* status. From the Data Definition Maintenance component, you can access the Item Loader Data Maintenance pages, correct any errors, and edit the staged item data.

After correcting the data errors, you can rerun the Item Loader process to populate the master data tables with the corrected item records.

The error is also found in the item loader error table (ITEMLOAD\_ERR).

## See Also

*PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook*, “Processing Enterprise Integration Points (EIPs),” Using Data Definition Maintenance

## Pages Used to Edit Data Errors in the Item Loader Staging Tables

| Page Name                                                                | Object Name       | Navigation                                                                                                                                                                                                                                  | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------------------------------------------------------------|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data Definition Maintenance                                              | EO_EIP_CTL_MAINT  | SCM Integrations,<br>Transaction Error Handling,<br>Maintain Data Definitions                                                                                                                                                               | Access the data definition maintenance - stage table data. The page provides information such as: the EIP control ID, the transaction type, reference data, the publishing node, the channel name, the last update date and time, and the process instance number.<br><br>See <i>PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook</i> , “Processing Enterprise Integration Points (EIPs),” Using Data Definition Maintenance. |
| Data Definition Maintenance - Errors                                     | IN_EIP_ITEM_MAINT | SCM Integrations,<br>Transaction Error Handling,<br>Maintain Data Definitions<br><br>Select the <i>ITEM</i> transaction type, and click the Search button.<br><br>Click the Show Detail Entry button for the desired row to view the error. | Access the error details of Item Loader data. Access other pages where fields for specific segments of the Item Loader data can be edited.<br><br>See <i>PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook</i> , “Processing Enterprise Integration Points (EIPs),” Using Data Definition Maintenance.                                                                                                                         |
| Data Definition Maintenance - Item Definition - General: Common          | IN_EIPITM_DEF1    | Click the Item Definition link on the Data Definition Maintenance - Errors page.                                                                                                                                                            | Edit item definition fields in the setID-level segment of staged Item Loader data.<br><br>See <a href="#">Chapter 4, “Defining Items by SetID,” Defining General Item Information, page 73.</a>                                                                                                                                                                                                                                                       |
| Data Definition Maintenance - Item Definition - General: Classifications | IN_EIPITM_DEF4    | Click the Classifications link on the Data Definition Maintenance - Item Definition - General: Common page.                                                                                                                                 | Edit item definition fields in the setID-level segment of staged Item Loader data.<br><br>See <a href="#">Chapter 4, “Defining Items by SetID,” Defining Additional Item Attributes, page 76.</a>                                                                                                                                                                                                                                                     |

| Page Name                                                                       | Object Name    | Navigation                                                                                                                   | Usage                                                                                                                                                                                                               |
|---------------------------------------------------------------------------------|----------------|------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data Definition Maintenance - Item Definition - General: Dimensions             | IN_EIPITM_DEF3 | Click the Dimensions link on the Data Definition Maintenance - Item Definition - General: Common page.                       | Edit item definition fields in the setID-level segment of staged Item Loader data.<br><br>See <a href="#">Chapter 4, “Defining Items by SetID,” Defining Item Dimensions, page 77.</a>                              |
| Data Definition Maintenance - Item Definition - General: Usage                  | IN_EIPITM_DEF8 | Click the Usage link on the Data Definition Maintenance - Item Definition - General: Common page.                            | Edit item definition fields in the setID-level segment of staged Item Loader data.<br><br>See <a href="#">Chapter 4, “Defining Items by SetID,” Defining Material Usage Attributes, page 77.</a>                    |
| Data Definition Maintenance - Item Definition - General: Related Language       | PV_EIPITM_DEF1 | Select the Gen-Related Language tab on the Data Definition Maintenance - Item Definition - General: Common page.             | Edit item definition fields in the setID-level segment of staged Item Loader data.<br><br>See <a href="#">Chapter 4, “Defining Items by SetID,” Defining Material Usage Attributes, page 77.</a>                    |
| Data Definition Maintenance - Item Definition - Inventory: Tracking/Description | IN_EIPITM_DEF2 | Select the Inventory tab on the Data Definition Maintenance - Item Definition - General: Common page.                        | Edit item definition fields in the setID-level segment of staged Item Loader data.<br><br>See <a href="#">Chapter 4, “Defining Items by SetID,” Establishing Item Tracking and Lot-Control Attributes, page 79.</a> |
| Data Definition Maintenance - Item Definition - Inventory: Shipping/Handling    | IN_EIPITM_DEF5 | Click the Shipping/Handling link on the Data Definition Maintenance - Item Definition - Inventory: Tracking/Description page | Edit item definition fields in the setID-level segment of staged Item Loader data.<br><br>See <a href="#">Chapter 4, “Defining Items by SetID,” Establishing Item Shipping and Handling Attributes, page 82.</a>    |
| Data Definition Maintenance - Item Definition - Inventory: Related Language     | PV_EIPITM_DEF2 | Select the Inv-Related Language tab on the Data Definition Maintenance - General - Common page.                              | Edit item definition fields in the setID-level segment of staged Item Loader data.<br><br>See <a href="#">Chapter 4, “Defining Items by SetID,” Defining Material Usage Attributes, page 77.</a>                    |
| Data Definition Maintenance - Item UOM (item unit of measurement) - Item UOM    | IN_EIPITEM_UOM | Click the Item UOM link on the Data Definition Maintenance - Errors page.                                                    | Edit item definition fields in the item UOM segment of staged Item Loader data.<br><br>See <a href="#">Chapter 4, “Defining Items by SetID,” Assigning a UOM to an Item, page 87.</a>                               |

| Page Name                                                                                | Object Name        | Navigation                                                                                                     | Usage                                                                                                                                                                                                                                           |
|------------------------------------------------------------------------------------------|--------------------|----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data Definition Maintenance - Item UOM - Item UOM Weight Volume                          | IN_EIPITEM_UOM_WVL | Select the Item UOM Weight Volume tab on the Data Definition Maintenance - Item UOM page.                      | Edit item definition fields in the item UOM segment of staged Item Loader data.                                                                                                                                                                 |
| Data Definition Maintenance - Item Revision - Item Revision                              | MG_EIPEN_REVISION  | Click the Item Revision link on the Data Definition Maintenance - Errors page.                                 | Edit item definition fields in the item revision segment of staged Item Loader data.<br><br><i>See PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, "Maintaining Bills of Material," Defining and Maintaining Revisions.</i>                 |
| Data Definition Maintenance - Item Revision - Revision Text                              | MG_EIPEN_REV_TEXT  | Select the Item Revision Text tab on the Data Definition Maintenance - Item Revision page.                     | Edit item definition fields in the item revision segment of staged Item Loader data.<br><br><i>See PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, "Maintaining Bills of Material," Defining and Maintaining Revisions.</i>                 |
| Data Definition Maintenance - Manufacturers                                              | IN_EIP_ITEM_MFG    | Click the Manufacturers link on the Data Definition Maintenance - Errors page.                                 | Edit item definition fields in the item manufacturer segment of staged Item Loader data.                                                                                                                                                        |
| Data Definition Maintenance - Universal Item Identifiers                                 | IN_EIP_ITEM_UPN    | Click the Universal Item Identifiers link on the Data Definition Maintenance - Manufacturers page.             | Maintain data in the universal item identifiers segment on the item stage tables.                                                                                                                                                               |
| Data Definition Maintenance - BU Attributes (business unit attributes) - General: Common | IN_EIPBU_GEN_ATTR  | Click the BU Attributes link on the Data Definition Maintenance - Errors page.                                 | Edit item definition fields in the business unit and item definition segment of staged Item Loader data.<br><br><i>See Chapter 5, "Defining Items by Business Unit," <a href="#">Defining Basic Business Unit Item Attributes</a>, page 99.</i> |
| Data Definition Maintenance - BU Attributes - General: Usage                             | IN_EIPBU_MATRL_USG | Click the Usage link on the Data Definition Maintenance - Item Definition - General: Common page.              | Edit item definition fields in the business unit and item definition segment of staged Item Loader data.                                                                                                                                        |
| Data Definition Maintenance - BU Attributes - General: Export Information                | IN_EIPBU_GATTR_EXP | Click the Export Information link on the Data Definition Maintenance - Item Definition - General: Common page. | Edit item definition fields in the business unit and item definition segment of staged Item Loader data.<br><br><i>See Chapter 5, "Defining Items by Business Unit," <a href="#">Defining Item Export Information</a>, page 102.</i>            |

| Page Name                                                                               | Object Name        | Navigation                                                                                                                        | Usage                                                                                                                                                                                                                                                                    |
|-----------------------------------------------------------------------------------------|--------------------|-----------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data Definition<br>Maintenance - BU<br>Attributes - Inventory:<br>Shipping/Handling     | IN_EIPBU_OVRD_ATTR | Select the Inventory tab<br>on the Data Definition<br>Maintenance - Item<br>Definition - General:<br>Common page.                 | Edit item definition fields in<br>the business unit and item<br>definition segment of staged<br>Item Loader data.<br><br>See <a href="#">Chapter 5, “Defining<br/>Items by Business Unit,”<br/>Defining Item Attributes for<br/>Shipping and Handling,<br/>page 103.</a> |
| Data Definition<br>Maintenance - BU Attributes<br>- Inventory: Replenishment            | IN_EIPBU_RPLN_ATTR | Click the Replenishment<br>link on the Data Definition<br>Maintenance - BU<br>Attributes - Inventory:<br>Shipping/Handling page.  | Edit item definition fields in<br>the business unit and item<br>definition segment of staged<br>Item Loader data.<br><br>See <a href="#">Chapter 5, “Defining<br/>Items by Business<br/>Unit,” Defining Item<br/>Replenishment Attributes,<br/>page 106.</a>             |
| Data Definition<br>Maintenance - BU Attributes<br>- Inventory: Weight/Volume            | IN_EIPBU_WTVL_ATTR | Click the Weight/Volume<br>link on the Data Definition<br>Maintenance - BU<br>Attributes - Inventory:<br>Shipping/Handling page.  | Edit item definition fields in<br>the business unit and item<br>definition segment of staged<br>Item Loader data.<br><br>See <a href="#">Chapter 5, “Defining<br/>Items by Business Unit,”<br/>Defining Item Information<br/>for Weight and Volume,<br/>page 108.</a>    |
| Data Definition<br>Maintenance - BU Attributes<br>- Manufacturing: General              | IN_EIPBU_MFG_ATTR  | Select the Manufacturing<br>tab on the Data Definition<br>Maintenance - Item<br>Definition - General:<br>Common page.             | Edit item definition fields in<br>the business unit and item<br>definition segment of staged<br>Item Loader data.<br><br>See <a href="#">Chapter 5, “Defining<br/>Items by Business Unit,”<br/>Defining Manufacturing<br/>Information for an Item,<br/>page 109.</a>     |
| Data Definition<br>Maintenance - BU Attributes<br>- Manufacturing: WIP<br>Replenishment | IN_EIPBU_MFG_ATTR2 | Click the WIP<br>Replenishment link on<br>the Data Definition<br>Maintenance - BU Attributes<br>- Manufacturing: General<br>page. | Edit item definition fields in<br>the business unit and item<br>definition segment of staged<br>Item Loader data.<br><br>See <a href="#">Chapter 5, “Defining<br/>Items by Business<br/>Unit,” Defining Item<br/>Replenishment Attributes,<br/>page 106.</a>             |

| Page Name                                                                 | Object Name        | Navigation                                                                                                            | Usage                                                                                                                                                                                                                                             |
|---------------------------------------------------------------------------|--------------------|-----------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data Definition<br>Maintenance - PO Attributes<br>- Purchasing Attributes | PO_EIPITM_TBL_PUR  | Click the PO Attributes link on the Data Maintenance Definition - Error page.                                         | Edit item definition fields in the item purchasing attributes segment of staged Item Loader data.<br><br><i>See PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Defining Purchasing Item Information," Defining Purchasing Item Attributes.</i> |
| Data Definition<br>Maintenance - PO Attributes<br>- Purchasing Controls   | PO_EIPITM_TBL_PUR2 | Select the Purchasing Controls tab on the Data Definition Maintenance - PO Attributes – Purchasing Attributes page.   | Edit item definition fields in the item purchasing attributes segment of staged Item Loader data.<br><br><i>See PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Defining Purchasing Item Information," Defining Purchasing Controls.</i>        |
| Data Definition<br>Maintenance - PO Attributes<br>- Purchasing Controls 2 | PO_EIPITM_TBL_PUR3 | Select the Purchasing Controls 2 tab on the Data Definition Maintenance - PO Attributes - Purchasing Attributes page. | Edit item definition fields in the item purchasing attributes segment of staged Item Loader data.<br><br><i>See PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Defining Purchasing Item Information," Defining Purchasing Controls.</i>        |
| Data Definition<br>Maintenance - PO Attributes<br>- Related Language      | PV_EIPITM_DEF4     | Select the Related Language tab on the Data Definition Maintenance - PO Attributes - Purchasing Attributes page.      | Edit item definition fields in the item purchasing attributes segment of staged Item Loader data.<br><br><i>See PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Defining Purchasing Item Information," Defining Purchasing Item Attributes.</i> |
| Data Definition<br>Maintenance - Categories                               | PV_EIPITEM_CAT     | Click the Categories link on the Data Definition Maintenance - Error page.                                            | Edit item definition fields in the item category segment of staged Item Loader data.<br><br><i>See PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Defining Purchasing Item Information," Defining Purchasing Item Categories.</i>              |

| Page Name                                                      | Object Name        | Navigation                                                                                              | Usage                                                                                                                                                                                                                                                                                               |
|----------------------------------------------------------------|--------------------|---------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data Definition<br>Maintenance - Item Vendor -<br>Item Vendors | PO_EIPITEM_VENDOR1 | Click the Item Vendor link<br>on the Data Definition<br>Maintenance - Error page.                       | Edit item definition fields in<br>the item vendor segment of<br>staged Item Loader data.<br><br><i>See PeopleSoft Enterprise<br/>Purchasing 9.0 PeopleBook,<br/>“Defining Purchasing Item<br/>Information,” Defining<br/>Purchasing Item Vendor<br/>Relationship Attributes and<br/>Priorities.</i> |
| Data Definition<br>Maintenance - Item Vendor -<br>Locations    | PO_EIPITEM_VENDOR2 | Select the Locations tab<br>on the Data Definition<br>Maintenance - Item Vendor -<br>Item Vendors page. | Edit item definition fields in<br>the item vendor segment of<br>staged Item Loader data.<br><br><i>See PeopleSoft Enterprise<br/>Purchasing 9.0 PeopleBook,<br/>“Defining Purchasing Item<br/>Information,” Defining<br/>Purchasing Item Vendor<br/>Relationship Attributes and<br/>Priorities.</i> |
| Data Definition<br>Maintenance - Item Vendor -<br>UOM          | PO_EIPITM_VND_UOM1 | Select the UOM tab on the<br>Data Definition Maintenance<br>- Item Vendor - Item Vendors<br>page.       | Edit item definition fields in<br>the item vendor segment of<br>staged Item Loader data.<br><br><i>See PeopleSoft Enterprise<br/>Purchasing 9.0 PeopleBook,<br/>“Defining Purchasing Item<br/>Information,” Updating Item<br/>Vendor Unit of Measure<br/>Conversion Rates.</i>                      |
| Data Definition<br>Maintenance - Item Vendor -<br>UOM Price    | PO_EIPITM_VND_UOM2 | Select the UOM Price tab<br>on the Data Definition<br>Maintenance - Item Vendor -<br>Item Vendors page. | Edit item definition fields in<br>the item vendor segment of<br>staged Item Loader data.<br><br><i>See PeopleSoft Enterprise<br/>Purchasing 9.0 PeopleBook,<br/>“Defining Purchasing Item<br/>Information,” Updating Item<br/>Vendor Unit of Measure<br/>Conversion Rates.</i>                      |
| Data Definition<br>Maintenance - Item Mfg<br>GPO Errors        | IN_EIPITM_MFG_GPO  | Click the Item Mfg GPO<br>link on the Data Definition<br>Maintenance - Error page.                      | Edit item definition fields<br>in the item manufacturer<br>GPO segment of staged Item<br>Loader data.                                                                                                                                                                                               |

## Accessing the Error Details of Item Loader Data

Access the Data Definition Maintenance - Errors page.

EIP Control ID: 40000000000001830000000001      Item ID: 30052      [Return](#)

| Errors                                                                                            |                                                                                  |                           | Customize   Find   View All    First 1-8 of 8 Last |
|---------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Field Name                                                                                        | Message Text                                                                     | Record Description        |                                                                                                                                       |
|  INVENTORY_ITEM  | Field is required.                                                               | Master Item Definition    |                                                                                                                                       |
|  LOT_CONTROL     | Field is required.                                                               | Master Item Definition    |                                                                                                                                       |
|  NON_OWN_FLAG    | Field is required.                                                               | Master Item Definition    |                                                                                                                                       |
|  PHYSICAL_NATURE | Invalid value -- press the prompt button or hyperlink for a list of valid values | Master Item Definition    |                                                                                                                                       |
|  SERIAL_CONTROL  | Field is required.                                                               | Master Item Definition    |                                                                                                                                       |
|  DISPOSABLE_FLAG | Field is required.                                                               | Inventory Item Definition |                                                                                                                                       |
|  RECYCLE_FLAG    | Field is required.                                                               | Inventory Item Definition |                                                                                                                                       |
|  REUSABLE_FLAG   | Field is required.                                                               | Inventory Item Definition |                                                                                                                                       |

[Item Definition](#)    [Item UOM](#)    Item Revision    [Manufacturers](#)    BU Attributes  
[PO Attributes](#)    [Categories](#)    Item Vendor    [Item Mfg GPO](#)

Data Definition Maintenance - Error page

If the staged Item Loader data contains errors, each field with an error appears in the Errors scroll area. The field name appears along with message text describing the problem and a record description. Click the Detail button to access the page where you can correct the error.

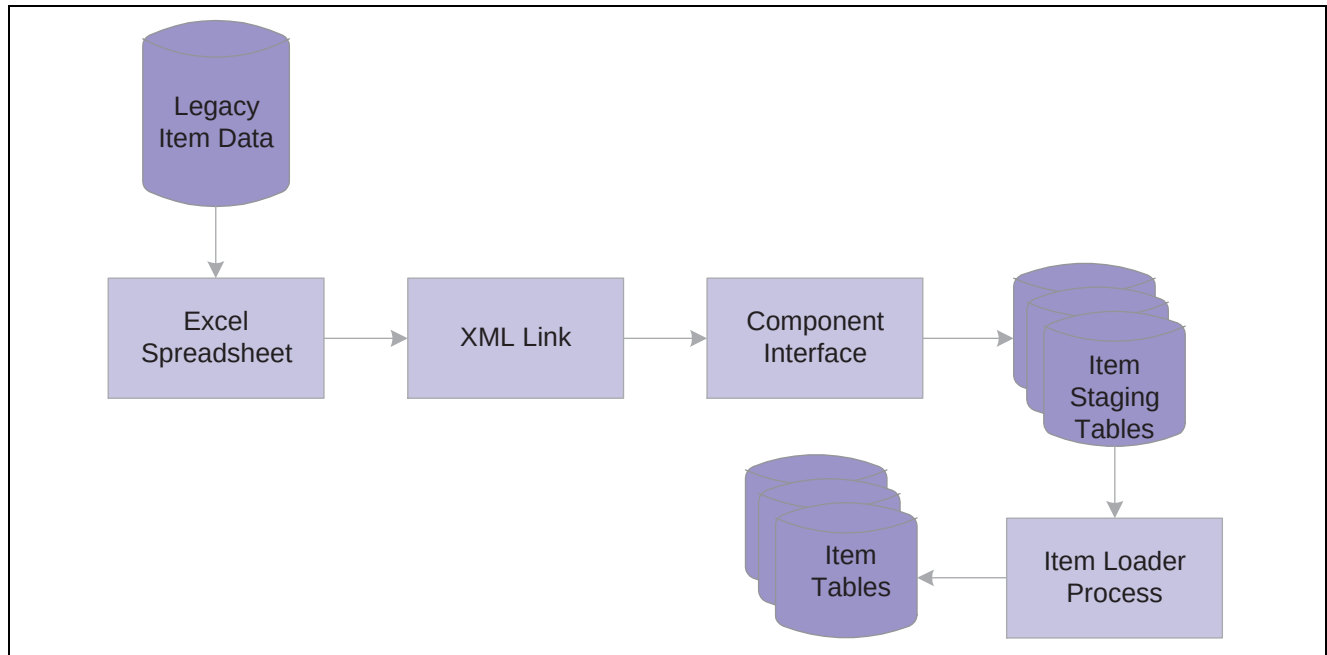
Click the links at the bottom of the page to access pages where you can modify the fields that are included in each segment of the message.

**Note.** If the Item Loader data for an item does not contain a specific message segment, you cannot access the corresponding pages.

## Using the Excel to Component Interface Utility

You can load item data into the Item Loader staging tables using a customized spreadsheet. This enables you to import data from a legacy system to a PeopleSoft system during the conversion process.

This diagram shows the process of loading item data from a spreadsheet:



Master Item Load Component Interface process

This process is divided into five steps:

1. Creating the spreadsheet.
2. Using the XML link.
3. Running the component interface.
4. Reviewing the item staging tables.
5. Running the Item Loader process.

## Creating the Spreadsheet

The spreadsheet enables you to create a template of the fields that you will enter and specify the component interface that will be used. The data in the spreadsheet is merged with any default values. You then run a provided macro by using an XML link.

Purchasing item attributes are added to the master item spreadsheet, not the item vendor spreadsheet. Purchasing item attributes must be defined for an item before you add the item vendor data.

## Using the XML Link

The XML link is a generic link that you use to enable the spreadsheet macro to communicate with the PeopleSoft component interface by using the *Add* mode.

## Running the Component Interface

Two component interfaces are available that you can use to load item data:

- The first component interface, `IN_MST_ITM_XLS`, enables you to define new items.

If an item ID exists on the master item table, the Item Loader process will reject this data. If an item ID is not provided, a new ID will be assigned. This component interface uses the same function as the item subscription to insert data into the staging tables. The component interface works only with those fields that are managed by the message. The records that are exposed during this component interface are:

- ITEM\_MFG\_CVW
- INV\_ITM\_UPN\_CVW
- ITEM\_CAT\_CVW
- BU\_ITM\_INV\_CVW (BU\_ITM\_WTVL\_CVW and EN\_REVISION\_CVW)
- INV\_ITM\_CVW
- ITM\_UOM\_CVW
- MASTER\_ITEM\_CVW
- PUR\_ITM\_ATR\_CVW
- The second component interface, IN\_VND\_ITM\_XLS, enables you to define new vendor item data for existing items.

You can provide SetID and INV\_ITEM\_ID or SetID and MFG\_ID and MFG\_ITEM\_ID to identify the existing items. If the system does not find master item or purchasing item data, the records are rejected by the component interface and are not added to the staging tables. The records that are exposed during this component interface are:

- MASTER\_ITEM\_CVW
- ITM\_VND\_CVW
- ITM\_VND\_LOC\_CVW
- ITM\_VND\_UOM\_CVW
- ITM\_VND\_UMP\_CVW

You cannot use both component interfaces to make changes to item data that exists in master data tables. You should make changes by using the Data Definition Maintenance component.

The Item Loader process performs the majority of the editing for errors; therefore, most errors are not returned to the spreadsheet by the component interface. You should review errors by using the Data Definition Maintenance component.

---

**Note.** You must load IN\_MST\_ITM\_XLS to add new item data, before IN\_VND\_ITM\_XLS if vendor item data is required.

---

## Reviewing the Item Staging Tables

The component interface populates the staging tables.

## Running the Item Loader Process

The Item Loader process picks up the data from the item staging tables, edits that data, and populates the Item Master data tables with the valid data. Editing for errors should be performed by using the Data Definition Maintenance option.

## See Also

[Chapter 6, “Loading Items,” Running the Item Loader Process, page 138](#)

[Chapter 6, “Loading Items,” Editing Data Errors in the Item Loader Staging Tables, page 140](#)



## CHAPTER 7

# Using Item Catalog Maintenance

This chapter provides an overview of item catalog maintenance, lists common elements, and discusses how to:

- Create and use catalog maintenance templates.
- Extract item data.
- Update staged item data.

---

## Understanding Item Catalog Maintenance

The Catalog Maintenance Template (ITM\_MASS\_TMPLT), Catalog Maintenance Extract (PO\_WXPORT\_CRITERIA), and Catalog Maintenance Update (PO\_MASS\_UPDATE) components enable you to efficiently update item data in the Item Loader staging tables in a secure and controlled environment.

The PeopleSoft Item Catalog Maintenance feature enables you to update item data for multiple items at one time. The item information is extracted from the item master tables into the item staging tables, where you can alter the data in a secure and controlled environment. You then use the Item Loader process to reload the data into the item master tables.

The Item Catalog Maintenance feature enables you to quickly change the data for large groups of items. This feature is especially useful for adding changes that affect numerous items. Examples include:

- Changing the item category for a large group of items.
- Increasing or decreasing the item prices by percentage.
- Correcting errors that are not found during an enterprise integration point (EIP) data load or MarketSite item load.

These are the steps to update data for items in PeopleSoft item master tables:

1. Create a template by using the Catalog Maintenance Template component:
  - a. Use the Record (Table) Name field on the Catalog Maintenance Template page to enter the records from the item staging tables that correspond to the item master tables that you want to change.
  - b. Select the Export Records check box to indicate that you want to use this template to export item data from the item master tables.
  - c. Click the View Export Records link to view the name of the item master tables containing data that will be downloaded to the item staging tables.
  - d. Click the Assign Roles link to access the Assign Roles page, where you select the roles with security rights to view and change item data by using this template.
  - e. Click the linked record description on the Catalog Maintenance Template page to access the Select Fields page, where you can select the record fields that can be altered when using this template.

- f. Use the Catalog Maintenance Template - Secure Data page to restrict the rows of item data that are retrieved from the item master tables.
2. Use the Catalog Maintenance Extract component to:
  - a. (Optional) Further refine the item selection by using the Catalog Maintenance Extract - Global Criteria page.
  - b. (Optional) View the data that will be downloaded.  
 From the Catalog Maintenance Extract page, select the item master table to be viewed and then click the View Data button to access the Select Fields page. After you have selected the fields to view, the data in the fields appear. This is the data to be extracted from the item master tables.
  - c. Run the process that extracts the item data.  
 Click the Execute Request button to run the process.
3. Use the Catalog Maintenance Update component to:
  - a. (Optional) Narrow the selection of items to be updated by using the Catalog Maintenance Update - Global Criteria page.
  - b. Enter the changes to the item data by using the Catalog Maintenance Update page.
  - c. Run the process that updates the item staging tables with the changes.  
 Click the Execute Request button to run the process.
4. Use the Item Loader page to reload the items into the PeopleSoft item master tables.  
 Be sure to identify the template to be used and to select the value of *Item Export* in the Item Load Type field.

---

**Note.** After you have placed an item in the item staging tables, any changes that you make to the item by using the standard pages may be overridden when the item is reloaded. A warning message appears when you access the downloaded items by using the following PeopleSoft pages and components:

Define Item component.

Purchasing Attributes component.

Item Approval page.

Define Business Unit Item component.

Define Item component.

Define Item - Units of Measure page.

Item Approval page.

Item Copy page.

Price Adjustments component.

Miscellaneous Charges page.

---

## Changing the Item's Standard Unit of Measure

The standard unit of measure (UOM) for an item can only be changed before transactions have been entered for the item ID. You can use the Define Item-General page to change the standard UOM for a few item IDs. However, to change a large number of items you will want to use the item catalog maintenance feature. Use the following steps to ensure that standard UOM updates are done correctly:

1. Create a template to extract the MASTER\_ITEM\_TBL and the INV\_ITEM\_UOM tables. On the Catalog Maintenance Template component, enter the staging tables of MASTER\_ITEM\_EC and INV\_ITEM\_UOM\_EC in the Record (Table) Name fields.

---

**Note.** There is no need to extract the INV\_ITEMS table. If the INV\_ITEMS table is extracted, there is an additional step in the process, which is detailed below.

---

2. Use the Catalog Maintenance Extract component to extract the item data based on the template previously created.
3. Based on the same template and same selection criteria used in the previous step, use the Catalog Maintenance Update component to:
  - a. Update the MASTER\_ITEM\_EC record with the new standard unit of measure (UNIT\_MEASURE\_STD).
  - b. Update the action field (AUDIT\_ACTN) on the MASTER\_ITEM\_EC record to the value of C (change).

---

**Note.** If the INV\_ITEMS record is extracted, use the Catalog Maintenance Update component to change the AUDIT\_ACTN field on the INV\_ITEM\_EC record to the value of C. This step is not necessary if the INV\_ITEMS record is not extracted.

---

- c. Click the Execute Request button to update the item staging tables with your changes.
4. Use the Item Loader page to reload the items into the PeopleSoft item master tables and update MASTER\_ITEM\_TBL and INV\_ITEM\_UOM tables with the new standard unit of measure.
- Be sure to identify the template to be used and to select the value of *Item Export* in the Item Load Type field.

---

**Note.** Once the Item Loader process is complete, the conversion rate for the standard UOM is set to 1. The Unit of Measure page (INV\_ITEM\_UOM ) displays the conversion rate between the standard UOM and other UOMs used by the item. After you have run the Item Loader process, you need to validate or change the conversion rates for any existing UOMs.

---

## See Also

[Chapter 6, “Loading Items,” Understanding Item Loader Data Flow, page 131](#)

## Common Elements Used in This Chapter

### Condition

This field is available for entry if you have two or more rows of criteria. Values are:

*AND*: Select if you want the system to consider each of the selected criteria when narrowing the scope of the item data update. For example, suppose that you select account 212020 *and* alternate account 111000. The system updates only item data that has been assigned to account 212020 and alternate account 111000.

*OR*: Select if you want the system to narrow the scope of the item data update by using any one of the selection criteria that you have selected. For example, suppose that you select account 212020 *or* alternate account 111000. The system updates item data that has been assigned to either account 212020 or alternate account 111000.

Use a combination of *AND* and *OR* conditions to specify more complex selection criteria. For example, suppose that you select account 212020 *or* alternate account 111000 *and* primary buyer Atamian, Wes. The system updates item data that has been assigned to either account 212020 or alternate account 111000 and that has also been assigned to the primary buyer Atamian, Wes.

**Field Name**

The technical name of the field that is used as criteria. The fields that are available for selection depend on the record that is selected. The system provides any prompts that are associated with the field that you select.

**Operator**

Select to define the quantifier for the value that you enter in the Value field. Values are:

*<=*: Less than or equal to the criteria.

*>=*: Greater than or equal to the criteria.

*Equal*: Equal to the criteria.

*Greater*: Greater than the criteria.

*Less*: Less than the criteria.

*Not Equal*: Does not match the criteria.

*Like*: Enables the use of wild cards in the Value field. The target item data must contain the criteria that are defined here. Valid wild cards depend on the database system.

*Not Like*: Enables the use of wild cards in the Value field. The target item data must not contain the criteria that are defined here. Valid wild cards depend on the database system.

**Value**

The system narrows the update to item data based on this value, combined with the operator value and the field that is selected.

**<View Values>**

Click to access the Select Valid Value page, where you can view and select values for the selected field.

---

## Creating and Using Catalog Maintenance Templates

This section discusses how to:

- Create catalog maintenance templates.
- Select and view catalog maintenance update fields.
- Assign role users to templates.
- Secure item data.

## Pages Used to Create and Use Catalog Maintenance Templates

| Page Name                                                          | Object Name       | Navigation                                                                                                                                                                                                                                                                                                                                                                                    | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|--------------------------------------------------------------------|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Catalog Maintenance Template                                       | ITM_MASS_TMPLT    | SCM Integrations, Setup, Catalog Maintenance Template                                                                                                                                                                                                                                                                                                                                         | Create catalog maintenance templates that serve as guides to the fields and records that can be updated by the assigned role users.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Select Fields                                                      | PO_MASS_FLD_SEL   | <p>Click the linked record description on the Catalog Maintenance Template page.</p> <p>Click the linked record description on the Secure Data page.</p> <p>The link text depends on the value in the Record (Table) Name field. If you are in Add mode, the link text is Select Fields.</p> <p>This page cannot be accessed unless a value is selected in the Record (Table) Name field.</p> | <p>Select and view catalog maintenance update fields.</p> <ul style="list-style-type: none"> <li>When you access this page from the Catalog Maintenance Template page, you can use the Select Fields page to specify the fields that a role that is assigned to the template can update.</li> <li>When you access this page from the Catalog Maintenance Update page, you can use the Select Fields page to view the fields that you have chosen to update.</li> <li>When you access this page from the Catalog Maintenance Update - Global Criteria page, you can use the Select Fields page to select the fields to include in the global criteria.</li> </ul> |
| Catalog Maintenance Template - Secure Data                         | ITM_TMPLT_GBL_CRT | SCM Integrations, Setup, Catalog Maintenance Template, Secure Data                                                                                                                                                                                                                                                                                                                            | Enter criteria to restrict the item data that is available to be altered.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Item Ctlg Maint Role Assign (item catalog maintenance role assign) | ITM_TMPLT_OPR     | Click the Assign Roles link on the Catalog Maintenance Template page.                                                                                                                                                                                                                                                                                                                         | Assign role users to the selected template.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

## Creating Catalog Maintenance Templates

Access the Catalog Maintenance Template page.

**Catalog Maintenance Template** **Secure Data**

**SetID:** SHARE **Template ID:** MAINTSTAGE

**\*Descr:** Maintain Item Stage **Short Desc:** Update Stg

☒ **Export Records?** ☐ **Update All Staged Data**

**Select Record** Find | View All First 1 of 11 Last

**\*Record (Table) Name:** BU\_ITM\_INV\_EC [Operating Inventory Record](#)

**Select Fields** Find | View 100 First 1-4 of 103 Last

| *Field Name     | Short Name      |
|-----------------|-----------------|
| ADD_HANDLING    |                 |
| AUDIT_ACTN      | Action          |
| AVAIL_LEAD_TIME | Avail Lead Time |
| BOM_CODE        | BOM             |

[Assign Roles](#) [View Export Records](#)

Catalog Maintenance Template page

Use the Catalog Maintenance Template component to create templates that define which records and fields can be extracted from the item master tables and updated. You assign role users to the templates to determine which users have authority to update the item data in the template. These templates serve as guides to which items can be updated and as security features.

## Select Record

### Record (Table) Name

Enter the record that is accessible to the roles that are assigned to the selected template. This record determines which fields are available for selection in the Select Fields scroll area. The records that are available for selection are limited to those that are currently in the staging tables for the Item Loader process.

### <Record Description>

Click the linked record description of the selected record (table) name to access the Select Fields page, where you can specify the fields that a role that is assigned to the template can update.

## Select Fields

Use the Select Fields scroll area to select the fields that you want to include in the template.

### Export Records

Select to enable users of this template to extract item data from the item master tables into the item staging tables, where the items can be changed.

### Update All Staged Data

Select to enable users of this template to update any data in the item staging tables without the template restrictions. Only power users should use this feature.

### Assign Roles

Click to access the Assign Roles page, where you can assign role users to the selected template.

**View Export Records**

Click to view the item master tables that contain item data that will be extracted to the item staging tables. The tables that are displayed are based on the entries in the Record (Table) Name field.

---

**Warning!** Only power users should select the Update All Staged Data check box. This option enables you to update data that is not related to the template.

---

**See Also**

[Chapter 6, “Loading Items,” Loading Items and Prices Using the Item Price List EIP, page 133](#)

[Chapter 7, “Using Item Catalog Maintenance,” Understanding Item Catalog Maintenance, page 151](#)

[Chapter 7, “Using Item Catalog Maintenance,” Updating Staged Item Data, page 162](#)

**Selecting and Viewing Catalog Maintenance Update Fields**

Access the Select Fields page.

**Select**

When you access this page from the Catalog Maintenance Template page, select to add the associated field to the item template. The fields that are available for selection are all of those that are not already assigned to the template. Select as many fields as necessary.

When you access this page from the Catalog Maintenance Update - Global Criteria page, select to add the associated field to the global criteria.

When accessed from the Secure Data page, select to add the associated field to the data extraction criteria.

When you click OK, the values that you selected appear on the primary page from which you accessed this page.

When accessed from the Catalog Maintenance Update page, any fields that you have selected to update on the Catalog Maintenance Update page appear with their associated check boxes selected.

**See Also**

[Chapter 7, “Using Item Catalog Maintenance,” Updating Staged Item Data, page 162](#)

**Assigning Role Users to Templates**

Access the Item Ctlg Maint Role Assign (item catalog maintenance role assign) page.

**Assign Roles****Role Name**

The role that is assigned to the template. When using the Catalog Maintenance Update component, users are able to access only the templates to which their own roles have been assigned.

**See Also**

*Enterprise PeopleTools 8.48 PeopleBook: Security Administration*

[Chapter 7, “Using Item Catalog Maintenance,” Creating and Using Catalog Maintenance Templates, page 154](#)

## Securing Item Data

Access the Catalog Maintenance Template - Secure Data page.

**Catalog Maintenance Template** **Secure Data**

**SetID:** SHARE **Template ID:** MAINTSTAGE  
**Descr:** Maintain Item Stage **Short Desc:** Update Stg

**Select Record** Find | View All First 1 of 1 Last  
**Record (Table) Name:** MASTER\_ITEM\_EC [Item Master Stage Table](#)

**Enter Criteria** Find | View All First 1 of 1 Last

| Condition | Field Name | Operator | Value |
|-----------|------------|----------|-------|
|           | SETID      | Equal    | SHARE |

Secure Data page

Use this page to restrict the data that is extracted from the item master tables that are listed on the Catalog Maintenance Template page. Specify the criteria that must be met before a row of data can be extracted from the item master tables to the item staging tables. Be sure to specify criteria to restrict the download to the current, active row of data.

## Extracting Item Data

This section discusses how to:

- Extract the selected data.
- View data before extraction.
- Filter items before extraction.

After a template is defined, you can extract the data from the item master tables and store it in the item staging tables. Use the Catalog Maintenance Extract component to:

- (Optional) Narrow the item data selection.
- Extract item data to the staging tables.

## Pages Used to Extract Item Data

| Page Name                                                                  | Object Name        | Navigation                                                                                   | Usage                                                                                                                                                                                                                                                                                            |
|----------------------------------------------------------------------------|--------------------|----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Catalog Maintenance Extract                                                | PO_EXPORT_CRITERIA | SCM Integrations, Process Transactions, Items, Catalog Maintenance Extract                   | Select the item record to download and run the extract process to move data from the item master tables to the item staging tables.                                                                                                                                                              |
| Select Fields                                                              | PO_MASS_FLD_SEL    | Click the View Operating Inventory Record Data link on the Catalog Maintenance Extract page. | Select the fields for which you want to view data.                                                                                                                                                                                                                                               |
| Item Ctlg Maint Export View Log (item catalog maintenance export view log) | PO_EXPORT_LOG      | Click the View Operating Inventory Record Log link on the Catalog Maintenance Extract page.  | View the meta SQL that is used to extract the data.                                                                                                                                                                                                                                              |
| Catalog Maintenance Extract - Global Criteria                              | PO_EXP_GLB_CRTRIA  | SCM Integrations, Process Transactions, Items, Catalog Maintenance Extract, Global Criteria  | Enter criteria to further restrict the item data that is available to be changed.                                                                                                                                                                                                                |
| Select valid value                                                         | PO_MASS_VAL_SEL    | Click the View Values button on the Catalog Maintenance Extract - Global Criteria page.      | Select values for the associated field. This page is accessible only when the selected field name has associated value prompts. Select the value that you want to use as a filter in combination with the value in the Operator field on the Catalog Maintenance Extract - Global Criteria page. |

## Extracting the Selected Data

Access the Catalog Maintenance Extract page.

| Catalog Maintenance Extract                                                                                                                                     |                     | Global Criteria                |            |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|--------------------------------|------------|
| <b>User ID:</b>                                                                                                                                                 | SAMPLE              | <b>Selection Criteria ID:</b>  | MAINEXTRCT |
| <b>SetID:</b>                                                                                                                                                   | SHARE               | <b>Template ID:</b>            | MAINTSTAGE |
|                                                                                                                                                                 |                     | <b>Entered on:</b>             | 12/17/2001 |
| <b>Delete Pending Stage Records</b> <input checked="" type="checkbox"/>                                                                                         |                     |                                |            |
| <b>Records to Export</b> <span style="float: right;">Customize   Find   View All   First 1-7 of 11 Last</span>                                                  |                     |                                |            |
| <input type="checkbox"/>                                                                                                                                        | Record (Table) Name | Record Description             |            |
| <input checked="" type="checkbox"/>                                                                                                                             | BU_ITEMS_INV        | Operating Inventory Record     |            |
| <input type="checkbox"/>                                                                                                                                        | BU_ITEMS_WTVOL      | Item Weight/Volume by UOM      |            |
| <input type="checkbox"/>                                                                                                                                        | EN_REVISION         | Item/Revision Record           |            |
| <input type="checkbox"/>                                                                                                                                        | INV_ITEM_UOM        | Inv Unit of Measure Conversion |            |
| <input type="checkbox"/>                                                                                                                                        | INV_ITEMS           | Inventory Item Master          |            |
| <input type="checkbox"/>                                                                                                                                        | ITM_VENDOR          | Vendor Item Table              |            |
| <input type="checkbox"/>                                                                                                                                        | ITM_VENDOR_LOC      | Vendor Location Item Table     |            |
| <span>Execute Request</span> <span><a href="#">View Operating Inventory Record Data</a></span> <span><a href="#">View Operating Inventory Record Log</a></span> |                     |                                |            |

Catalog Maintenance Extract page

### Delete Pending Stage Records

Select to delete rows in the item staging table from a previous extraction process. This option enables you to purge existing data for this template in the item staging tables.

### Execute Request

Click the Execute Request button to run the PeopleCode that extracts the data. The records that you select on this page are retrieved from the item master tables and placed in the item staging tables.

### View Data

Click to access the Select Fields page, where you can select the fields to view. Then click OK on the Select Fields page to access the View Data page, where you can review data. The text of this link changes depending on the record that is selected in the Record (Table) Name field.

### View Log

Select to access the Item Ctlg Maint Export ViewLog (item catalog maintenance export view log) page, where you can view information about updates that are made by using this selection criteria ID. The information on this page can be useful for backtracking purposes. The text of this link changes depending on the name of the record that is selected in the Record (Table) Name field.

## Viewing Data Before Extraction

To view the data that will be extracted:

1. Access the Catalog Maintenance Extract page.
2. Select the check box next to the item master table to be viewed.
3. Click the View Data link on the to access the Select Fields page.
4. Select the fields that you want to view, and then click OK.

The View Data page appears.

## Filtering Items Before Extraction

Access the Catalog Maintenance Extract - Global Criteria page.

**Catalog Maintenance Extract** **Global Criteria**

**User ID:** SAMPLE **Selection Criteria ID:** MAINEXTRCT  
**SetID:** SHARE **Template ID:** MAINTSTAGE **Entered on:** 12/17/2001  
**Delete Pending Stage Records** ☒

**Select Record** Find | View All First 1 of 1 Last  
**Record (Table) Name:** MASTER\_ITEM\_TBL [Item Master Header Table](#)

**Enter Criteria** Find | View All First 1-2 of 2 Last

| Condition | Field Name  | Operator | Value |
|-----------|-------------|----------|-------|
|           | SETID       | Equal    | SHARE |
| AND       | INV_ITEM_ID | Equal    | 10002 |

Global Criteria page

To filter items before extracting them, use the fields on this page to filter items that you do not want to extract.

### Select Record

Select the records that you want to include in the global criteria. This narrows the scope of fields that you want to update.

**Record (Table) Name** Enter the record that you want to include in the global criteria. This record determines which fields are available for selection in the Enter Criteria scroll area.

### Enter Criteria

Define field criteria to use to narrow the scope of the item data update. For example, select Field Name *ACCOUNT*, Operator *Equal*, and Value *212020* to isolate the item data updates to items that are associated with account 212020.

**<View Values>** Click to access the Select valid value page, where you can select values to use as filters in the Value field.

**<Choose a date>** Click to access a calendar, where you can select a date to be placed in the Value field.

**Note.** When you are entering criteria for an effective-dated record, the system assumes these two criteria when extracting the data if no criteria was entered for the fields:

Effective Date (EFFDT) equals the maximum date prior or equal to the current date.

Status of Effective Date (EFF\_STATUS) equals *A* (Active).

### See Also

Chapter 7, “Using Item Catalog Maintenance,” Creating and Using Catalog Maintenance Templates, page 154

## Updating Staged Item Data

This section discusses how to:

- Update item records and fields.
- Select values for associated fields.
- Preview item data changes.
- View logs for previous catalog maintenance updates.
- Select subquery criteria.

The PeopleSoft application staged item update functionality enables you to efficiently update item data in the Item Loader staging tables in a secure and controlled environment. Using catalog maintenance templates and the pages in the Catalog Maintenance Update component, you can specify the values with which to update existing records and fields and narrow the scope of the fields to update.

### Pages Used to Update Staged Item Data

| Page Name                  | Object Name     | Navigation                                                                                                                    | Usage                                                                                                                                                                                                                                                                                   |
|----------------------------|-----------------|-------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Catalog Maintenance Update | PO_MASS_UPDATE  | SCM Integrations, Process Transactions, Items, Catalog Maintenance Update                                                     | Select item data records and fields that you want to update. Specify the values with which you want to update the item data. After you save the information that you enter in this component, you can return and carry out the same item data changes by selecting the same control ID. |
| Select valid value         | PO_MASS_VAL_SEL | Click the View Values button on the Catalog Maintenance Update page or the Catalog Maintenance Update - Global Criteria page. | View and select values for the associated field. This page is accessible only when the selected field name has associated value prompts.                                                                                                                                                |
| View Data                  | MASS_VIEW       | Click the View Data link on the Catalog Maintenance Update page. Or click OK on the Select Fields page.                       | Preview the item data changes that you specified on the Catalog Maintenance Update pages.                                                                                                                                                                                               |

| Page Name                                                                 | Object Name        | Navigation                                                                                                                                                                                                                                                                                                          | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|---------------------------------------------------------------------------|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Select Fields                                                             | PO_MASS_FLD_SEL    | <ul style="list-style-type: none"> <li>Click the View Data link on the Catalog Maintenance Update page.</li> <li>Click the Select Fields link on the Catalog Maintenance Update - Global Criteria page. The link text changes depending on the value that was selected in the Record (Table) Name field.</li> </ul> | <ul style="list-style-type: none"> <li>When you access this page from the Catalog Maintenance Update page, view the fields that you have chosen to update.</li> <li>When you access this page from the Catalog Maintenance Update - Global Criteria page, select the fields to include in the global criteria.</li> </ul> <p>See <a href="#">Chapter 7, “Using Item Catalog Maintenance,” Selecting and Viewing Catalog Maintenance Update Fields, page 157</a>.</p> |
| Item Ctlg Maint Update ViewLog (item catalog maintenance update view log) | PO_MASS_LOG        | Click the View Log link on the Catalog Maintenance Update page.                                                                                                                                                                                                                                                     | View information about updates to item data that are made by using the selected control ID. The information on this page can be useful for backtracking purposes. Each time you click the Execute button on the Catalog Maintenance Update page for a control ID, a new log record is created.                                                                                                                                                                       |
| Catalog Maintenance Update - Global Criteria                              | PO_MASS_GLB_CRTRIA | SCM Integrations, Process Transactions, Items, Catalog Maintenance Update, Global Criteria                                                                                                                                                                                                                          | Specify any criteria that you want to use to narrow the scope of records to be updated.                                                                                                                                                                                                                                                                                                                                                                              |

## Updating Item Records and Fields

Access the Catalog Maintenance Update page.

| Catalog Maintenance Update |        | Global Criteria               |            |
|----------------------------|--------|-------------------------------|------------|
| <b>User ID:</b>            | SAMPLE | <b>Selection Criteria ID:</b> | UPDTSTG    |
| <b>SetID:</b>              | SHARE  | <b>Template ID:</b>           | MAINTSTAGE |
|                            |        | <b>Entered on:</b>            | 12/17/2001 |

| Select Record                       |                                            | Find   View All         | First | 1 of 2 | Last |
|-------------------------------------|--------------------------------------------|-------------------------|-------|--------|------|
| <input checked="" type="checkbox"/> | <b>Record (Table) Name:</b> MASTER_ITEM_EC | Item Master Stage Table |       |        |      |

| Update Fields    |            | Find   View All | First | 1 of 1 | Last |
|------------------|------------|-----------------|-------|--------|------|
| Field Name       | Short Name | Value           | %     |        |      |
| 1 CONSIGNED_FLAG | Consigned  | N               |       |        |      |

[Execute Request](#)
[View Item Master Stage Table Data](#)
[View Item Master Stage Table Log](#)

Catalog Maintenance Update page

**Entered On** Displays the date that the selection criteria ID was created.

## Select Record

**Record (Table) Name** Select the record that you want to update. Only records that are defined in the selected template ID are available for selection. Select the check box next to this field to activate the links at the bottom of the Catalog Maintenance Update page.

## Update Fields

Select the fields that you want to update, and define the values with which you want to update the fields.

**Field Name** Enter the object name of the field to be updated. Fields that are available for selection are based on the table that is selected in the Record (Table) Name field. The system provides any prompts that are associated with the field that you select. If prompts are applicable, the View Values button becomes available for use with the Value field. If the selected field is numeric, the % field becomes available for entry. The fields that are available for selection depend on the selected template ID.

**Value** The value with which the selected field will be updated. If the % field is also available for entry, enter a value in only one of these fields.

**%** If the selected field name is numeric, this field is available for entry, in addition to the Value field. Enter a value in only one of these fields. For example, if you want to update item pricing by a specific percentage increase or decrease, enter a value in the % field.

**Execute Request** Click to perform the item data updates that you have defined.

## Selecting Values for Associated Fields

Access the Select valid value page.

**Select** Select the appropriate field value and click OK. The value that you selected appears on the page that you used to access the Select valid value page.

## Previewing Item Data Changes

Access the View Data page.

The column headings that appear on this page depend on the item data updates that you defined on the Catalog Maintenance Update pages.

The information that appears in the columns provides a preview of the changes that will be made to the item data.

**Rows** The number of rows that will be altered by updates that are defined on the Catalog Maintenance Update pages.

## Viewing Logs for Previous Catalog Maintenance Updates

Access the Item Ctlg Maint Update ViewLog (item catalog maintenance update view log) page.

**Item Ctlg Maint Update ViewLog**

**User ID:** SAMPLE **Selection Criteria ID:** UPDTSTG  
**SetID:** SHARE **Template ID:** MAINTSTAGE **Entered on:** 12/17/2001

**Update Log**
Find | View All
 First 1 of 1 Last

**Record (Table) Name:** MASTER\_ITEM\_EC  
**User ID:** SAMPLE  
**Datetime Modified:** 09/08/03 4:51PM  
**Count:** 0.00  
**Scope of Work:**

```

UPDATE PS_MASTER_ITEM_EC SET CONSIGNED_FLAG = 'N' WHERE
(SETID = 'SHARE' AND ITM_TMPLT_ID = 'MAINTSTAGE') AND EXISTS
(SELECT 'X' FROM PS_EO_EIP_CTL D WHERE D.EIP_CTL_ID =
PS_MASTER_ITEM_EC.EIP_CTL_ID AND D.EIP_DTA_STATUS IN('0', '4'))

```

Item Ctlg Maint Update ViewLog page

### Update Log

**Record (Table) Name** Displays the name of the record that was updated.

**User ID** Displays the user ID of the person who performed the item update process.

**Datetime Modified** Displays the date and time when the update was performed.

|                      |                                                                                   |
|----------------------|-----------------------------------------------------------------------------------|
| <b>Count</b>         | Displays the number of records that were updated.                                 |
| <b>Scope of Work</b> | Displays the information about the changes that were made by the selected update. |

## Selecting Subquery Criteria

Access the Catalog Maintenance Update - Global Criteria page.

Global Criteria page

### Select Record

Select the records that you want to include in the global criteria. This narrows the scope of fields that you want to update.

|                            |                                                                                                                                                                      |
|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Record (Table) Name</b> | Enter the record that you want to include in the global criteria. This record determines which fields are available for selection in the Enter Criteria scroll area. |
|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### Enter Criteria

Use the Enter Criteria scroll area to define field criteria to narrow the scope of the item data update. For example, select Field Name *ACCOUNT*, Operator *Equal*, and Value *212020* to isolate the item data updates to items that are associated with account 212020.

|                              |                                                                                                                                              |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| <b>&lt;View Values&gt;</b>   | Click the View Values button to access the Select valid value page, where you can select values to use as filters in the <i>Value</i> field. |
| <b>&lt;Choose a date&gt;</b> | Select to access a calendar, where you can select a date to be placed in the <i>Value</i> field.                                             |

### See Also

Chapter 7, “Using Item Catalog Maintenance,” Creating and Using Catalog Maintenance Templates, page 154

## APPENDIX A

# Delivered Workflow for PeopleSoft Managing Items

This appendix discusses workflows for the PeopleSoft Enterprise Managing Items PeopleBook.

### See Also

*PeopleSoft Enterprise Inventory 9.0 PeopleBook*, “Preparing to Implement PeopleSoft Inventory,” Using Workflow in PeopleSoft Inventory

*Enterprise PeopleTools 8.48 PeopleBook: Workflow Technology*

*Enterprise PeopleTools 8.48 PeopleBook: Using PeopleSoft Applications*

---

## Delivered Workflow for PeopleSoft Managing Items

This section discusses PeopleSoft workflow for managing items. The workflows are listed alphabetically by workflow name.

### Item Approval

The section discusses the item approval workflow.

#### Description

|                            |                                                                                                                                      |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| <b>Event Description</b>   | This workflow routes item approvals to appropriate role users. Select item approval method on the Installation Options-Overall page. |
| <b>Action Description</b>  | Selecting a worklist entry transfers you to the Item Approval page. If approval is denied, then an email is sent.                    |
| <b>Notification Method</b> | Email and Worklist                                                                                                                   |

**Workflow Objects**

|                          |                                                                                          |
|--------------------------|------------------------------------------------------------------------------------------|
| <b>Event</b>             | MASTER_ITEM_TBL                                                                          |
| <b>Workflow Action</b>   | Route for approval                                                                       |
| <b>Role</b>              | Role is defined by user.                                                                 |
| <b>Email Template</b>    | INV_ITEM_A_WL                                                                            |
| <b>Business Process</b>  | Approve Inventory Items                                                                  |
| <b>Business Activity</b> | Inventory Item Approval and Item Approval                                                |
| <b>Business Event</b>    | Inventory Item Approval, Inventory Item Denial, and Inventory Item Under Initialization. |

## APPENDIX B

# PeopleSoft Item Reports

This appendix provides an overview of item reports and enables you to:

- View a summary table of reports.
- View report details.

---

## PeopleSoft Item Reports

This table lists the items reports sorted in alphanumerical order by report ID. The reports listed are SQR reports. If you need more information about a report, refer to the report details at the end of this appendix.

| Report ID and Report Name               | Description                                                                                                                                                                                                                                                                                                                                                                                                                     | Navigation                                             | Run Control Page |
|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|------------------|
| INS4000<br>Item Status Change Exception | The Item Status Change process generates this report when a scheduled item status change to <i>Inactive</i> cannot be implemented. The Item Status Change process produces two versions of this report. One version reflects scheduled <i>Inactive</i> status changes that could not be made for the item at the business unit level, the other shows <i>Inactive</i> status changes that could not be made at the setID level. | Items, Define Items and Attributes, Change Item Status | RUN_INS4000      |
| INS9030<br>Device Tracking Master List  | Displays device-tracked items, filtered according to the specified parameters.                                                                                                                                                                                                                                                                                                                                                  | Items, Reports, Device Tracking Master List            | RUN_INS9030      |
| INS9040<br>Basic Item Listing Report    | Lists the basic attributes for each item.                                                                                                                                                                                                                                                                                                                                                                                       | Items, Reports, Basic Item Listing                     | RUN_INS9040      |

---

## PeopleSoft Item Reports: A to Z

This section provides detailed information on individual reports. The reports are listed in alphanumerical order by report ID.

## Item Status Change Exception (INS4000)

---

**Note.** If the Item Status Change process successfully implements all scheduled changes to *Inactive* status, the Item Status Change Exception report is not generated.

---

Exceptions can exist on the business unit or the setID level.

If an item cannot be inactivated at the business unit level, the business unit level report lists all business unit tables where transactions preventing inactivation exist.

|                                          |                                                                                                                                                                                  |
|------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reference to Item Exists in Table</b> | Business unit table that contains a record or transaction that prevents the item from being inactivated. All records or transactions are listed where this item ID still exists. |
|------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

If an item cannot be inactivated at the setID level, the setID report lists the business units where the item has not been successfully inactivated. You cannot inactivate an item at the setID level until the item has been inactivated at all business units that belong to the setID.

|                                               |                                                                                                                                          |
|-----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Business Units Where Item Not Inactive</b> | Business units where the items status has not been successfully changed to <i>Inactive</i> , preventing inactivation at the setID level. |
|-----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|

## Device Tracking Master List (INS9030)

|                               |                                                                                                                                                   |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Include Inactive Items</b> | Select to include items that are restricted to warehouse movement transactions, adjustments, RMA and RTV transactions, and receiving transaction. |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|

## Basic Item Listing (INS9040)

For information on Basic Item Listing, see Managing Inventory by Item Status.

# Glossary of PeopleSoft Enterprise Terms

|                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>absence entitlement</b>   | 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.                                                                                                                                                                                                                                               |
| <b>absence take</b>          | This element defines the conditions that must be met before a payee is entitled to take paid time off.                                                                                                                                                                                                                                                                                                                                                                      |
| <b>academic career</b>       | 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). |
| <b>academic institution</b>  | 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.                                                                                                                                                                                                                                                                              |
| <b>academic organization</b> | 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.                                                                                                                                                                                   |
| <b>academic plan</b>         | 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.                                                                                                                                                                                                                                                                                                            |
| <b>academic program</b>      | In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.                                                                                                                                                                                                                                                                                                                                      |
| <b>accounting class</b>      | 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.                                                                  |
| <b>accounting date</b>       | 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. |
| <b>accounting split</b>      | The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.                                                                                                                                                                                                                                                                                                                                               |
| <b>accumulator</b>           | 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.                                                                                              |
| <b>action reason</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>action template</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>activity</b>                | <p>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.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>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.</p> |
| <b>address usage</b>           | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>adjustment calendar</b>     | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>administrative function</b> | 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.                                                                                                                                                                                                                                                                                                                                        |
| <b>admit type</b>              | In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>agreement</b>               | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>allocation rule</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>alternate account</b>       | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>analysis database</b>       | 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.                                                                                                           |
| <b>Application Messaging</b>  | 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. |
| <b>AR specialist</b>          | Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.                                                                                                                                              |
| <b>arbitration plan</b>       | 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.                                                                                                                                             |
| <b>assessment rule</b>        | 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.                                                                                                |
| <b>asset class</b>            | An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.                                                                                                                                                                           |
| <b>attribute/value pair</b>   | In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.                                                                                                                                                                                    |
| <b>auction event</b>          | In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.                                                                                                                                                                   |
| <b>audience</b>               | 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.             |
| <b>authentication server</b>  | A server that is set up to verify users of the system.                                                                                                                                                                                                                                                      |
| <b>base time period</b>       | In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.                                                                                                                                                                                                                     |
| <b>benchmark job</b>          | 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.                                                                                                                               |
| <b>bid response</b>           | In PeopleSoft Strategic Sourcing, the response by a bidder to an event.                                                                                                                                                                                                                                     |
| <b>billing career</b>         | 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.                                                                                                                             |
| <b>bio bit or bio brief</b>   | 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.                                                                                                                      |
| <b>book</b>                   | In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.                                                                                                                                    |
| <b>branch</b>                 | A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.                                                                                                                                                                                                        |
| <b>budgetary account only</b> | 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."                                                                                                                 |

|                                  |                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>budget check</b>              | In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.                                                                                                                                                                                                                                                              |
| <b>budget control</b>            | 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. |
| <b>budget period</b>             | 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.                                                                                                                                                |
| <b>business activity</b>         | 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.                                                                                                                                                                                                                                                           |
| <b>business event</b>            | <p>In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.</p> <p>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).</p>                                              |
| <b>business process</b>          | <p>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.</p> <p>See also <i>detailed business process</i>.</p>         |
| <b>business unit constraints</b> | 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.                                                                                                                                                                                                    |
| <b>business task</b>             | The name of the specific function depicted in one of the business processes.                                                                                                                                                                                                                                                                                                                                 |
| <b>business unit</b>             | A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.                                                                                                                                                                                                                                                                               |
| <b>buyer</b>                     | 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.                                                                                                                                                                        |
| <b>buy event</b>                 | 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.                                                                                                                                                                                       |
| <b>campus</b>                    | 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.                                                                                                          |
| <b>cash drawer</b>               | A repository for monies and payments taken locally.                                                                                                                                                                                                                                                                                                                                                          |
| <b>catalog item</b>              | 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.                                       |
| <b>catalog map</b>               | In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.                                                                                                                                                                                                                                                                          |

|                                    |                                                                                                                                                                                                                                                                                                                                    |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>catalog partner</b>             | In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.                                                                                                                                                                                            |
| <b>categorization</b>              | Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.                                                                                                                                                                                                                            |
| <b>category</b>                    | 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.                                                                   |
| <b>channel</b>                     | In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.                                                                                                                                                                                                               |
| <b>ChartField</b>                  | 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.                                                                                                                         |
| <b>ChartField balancing</b>        | You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.                                                                                                                                                                                                                      |
| <b>ChartField combination edit</b> | The process of editing journal lines for valid ChartField combinations based on user-defined rules.                                                                                                                                                                                                                                |
| <b>ChartKey</b>                    | 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.                                                                                                                                                                                  |
| <b>checkbook</b>                   | 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.                                                                                                                                                  |
| <b>checklist code</b>              | 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.                                                                                        |
| <b>claimback</b>                   | 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.                                                                                                     |
| <b>class</b>                       | In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.<br><br>See also <i>course</i> .                                                                                                                                                                                      |
| <b>Class ChartField</b>            | A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .                                                                                                                     |
| <b>clearance</b>                   | 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. |
| <b>clone</b>                       | In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.                                                                                                                                     |
| <b>cohort</b>                      | 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.<br><br>See also <i>population</i> and <i>division</i> .                      |

|                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>collection</b>                      | 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. |
| <b>collection rule</b>                 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>comm key</b>                        | See <i>communication key</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>communication key</b>               | In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i> ) can be created for background processes as well as for specific users.                                                                                                                                                                                                                                             |
| <b>compensation object</b>             | 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.                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>compensation structure</b>          | In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>component interface</b>             | 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.                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>condition</b>                       | 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.                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>configuration parameter catalog</b> | 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.                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>configuration plan</b>              | 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.                                                                                                                                                                                                                                                                                                                                                        |
| <b>constituents</b>                    | 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).                                                                                                                                                                                                               |
| <b>constraint</b>                      | A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>content reference</b>               | 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.                                                                                                                                                                                                                                                                                                                                                                               |
| <b>context</b>                         | 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.<br><br>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                                                                                                                                                                                                                                                      |

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|                                | 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.                                                                                                                                |
| <b>control table</b>           | 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.                                                                                                                   |
| <b>cost plus contract line</b> | 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.                                                                                                                                              |
| <b>cost plus pricing</b>       | In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.                                                                                                                                                                                                                                                          |
| <b>cost profile</b>            | 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.                                                                                                     |
| <b>cost row</b>                | A cost transaction and amount for a set of ChartFields.                                                                                                                                                                                                                                                                                                 |
| <b>counter sale</b>            | 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.                                                                  |
| <b>course</b>                  | 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.<br><br>See also <i>class</i> . |
| <b>course share set</b>        | 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.                                                                                                                                                              |
| <b>current learning</b>        | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.                                                                                                                                                                                                            |
| <b>data acquisition</b>        | 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).                                                                                                                                                              |
| <b>data cube</b>               | 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.         |
| <b>data elements</b>           | Data elements, at their simplest level, define a subset of data and the rules by which to group them.<br><br>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.                                                                                                               |
| <b>dataset</b>                 | 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.                                                              |

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| <b>delivery method</b>            | <p>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.</p> <p>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.</p> |
| <b>delivery method type</b>       | 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.                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>detailed business process</b>  | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>dimension</b>                  | <p>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.</p>                                                                                                                          |
| <b>direct receipt</b>             | Items shipped from a warehouse or vendor to another warehouse.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>direct ship</b>                | Items shipped from the vendor or warehouse directly to the customer (formerly referred to as <i>drop ship</i> ).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>directory information tree</b> | In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>division</b>                   | <p>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.</p> <p>See also <i>population</i> and <i>cohort</i>.</p>                                                                                                                                                                                                                                                                                                                                                  |
| <b>document sequencing</b>        | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>dynamic detail tree</b>        | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>edit table</b>                 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>effective date</b>             | 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.                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>EIM ledger</b>                 | Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.                                                                                                                                                                                                                                                                                                                                                                        |

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| <b>elimination set</b>           | In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.                                                                                                                                                                                                                                                                                                                                         |
| <b>entry event</b>               | 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.                                                                                                                                                                                                                    |
| <b>equitization</b>              | 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.                                                                                                                                                                                       |
| <b>equity item limit</b>         | 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.                            |
| <b>event</b>                     | <p>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.</p> <p>In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.</p>                               |
| <b>event constraints</b>         | In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.                                                                                                                                                                                                                                                                                                                     |
| <b>event propagation process</b> | 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.        |
| <b>exception</b>                 | In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.                                                                                                                                                                                                                                                                                                                                                                         |
| <b>exclusive pricing</b>         | 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.                                                                                                                                                                                                                                                                                           |
| <b>fact</b>                      | 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.                                                                                                                                                            |
| <b>financial aid term</b>        | 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.                                                                                                                                                          |
| <b>financial sanctions</b>       | <p>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.</p> <p>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).</p> |
| <b>forecast item</b>             | 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.                                                                                                                                                   |

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| <b>fund</b>                 | 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.                                                                                                                                                                                                                                                                                                         |
| <b>gap</b>                  | 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.                                                                                                                                                                        |
| <b>generic process type</b> | 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.                                                                                                                                                                                                                                                                                                            |
| <b>gift table</b>           | In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.                                                                                                                          |
| <b>GDS</b>                  | Abbreviation for <i>Global Distribution System</i> . Broad-based term to describe all computer reservation systems for making travel plans.                                                                                                                                                                                                                                                                                                                                                                       |
| <b>GL business unit</b>     | Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.<br><br>See also <i>business unit</i> .                                                                                                                                                                                                                                                                                      |
| <b>GL entry template</b>    | Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.                                                    |
| <b>GL Interface process</b> | Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.                                                                                                                                       |
| <b>global constraints</b>   | 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.                                                                                                                                                                                                                                                                                                       |
| <b>group</b>                | In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).<br><br>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. |
| <b>ideal response</b>       | 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.                                                                                                                                                                                                                             |
| <b>incentive object</b>     | 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.                                                                                                                                                                                                                                                   |

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| <b>incentive rule</b>      | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>incur</b>               | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>initiative</b>          | 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.                                                                                                                                                                                                                                                           |
| <b>inquiry access</b>      | In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.<br><br>See also <i>update access</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>institution</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>integration</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>integration point</b>   | An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>integration set</b>     | A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>item</b>                | In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).<br><br>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.<br><br>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. |
| <b>item shuffle</b>        | In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>itinerary</b>           | In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as <i>pending reservations</i> . Reservations that have been paid for are referred to as <i>confirmed reservations</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>joint communication</b> | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

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| <b>keyword</b>              | 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.                                                                                                                                                                                                                                                                                                                  |
| <b>KPI</b>                  | An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.                                                                                                                                                                                                                                                                                                                                                                |
| <b>KVI</b>                  | Abbreviation for <i>Known Value Item</i> . Term used for products or groups of products where the selling price cannot be reduced or increased.                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>landlord</b>             | In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>LDIF file</b>            | Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise data and directory data.                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>learner group</b>        | 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.                                                                                                                                                                                             |
| <b>learning components</b>  | 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.                                                                                                                                                                                                                                                                |
| <b>learning environment</b> | 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.                                                                                                                                                                               |
| <b>learning history</b>     | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>lease</b>                | 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.                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>lease abstract</b>       | 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.                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>ledger mapping</b>       | You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i> ) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table. |
| <b>library section</b>      | 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.                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>line</b>                 | In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

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| <b>linked section</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>linked variable</b>        | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>LMS</b>                    | Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>load</b>                   | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>local functionality</b>    | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>location</b>               | Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.                                                                                                                                                                                                                                                                                                                                               |
| <b>logistical task</b>        | 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. |
| <b>market template</b>        | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>mass change</b>            | 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.<br><br>See also <i>3C engine</i> .                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>match group</b>            | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>MCF server</b>             | Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>merchandising activity</b> | 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.                                                                                                                                                                                                                                                                                                                                                                      |

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| <b>meta-SQL</b>            | 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.                                                                                                                                                                   |
| <b>metastring</b>          | 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.                                                                                                                |
| <b>multibook</b>           | 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).                                                                                                            |
| <b>multicurrency</b>       | The ability to process transactions in a currency other than the business unit's base currency.                                                                                                                                                                                                                                                                                 |
| <b>national allowance</b>  | 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.                                                                                                                                      |
| <b>NDP</b>                 | Abbreviation for <i>Non-Discountable Products</i> . Term used for products or groups of products where the selling price cannot be decreased.                                                                                                                                                                                                                                   |
| <b>need</b>                | In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> . |
| <b>node-oriented tree</b>  | A tree that is based on a detail structure, but the detail values are not used.                                                                                                                                                                                                                                                                                                 |
| <b>Optimization Engine</b> | 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.                                                                                                                              |
| <b>pagelet</b>             | 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.                                                                                               |
| <b>participant</b>         | In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.                                                                                                                                                                                                                                                   |
| <b>participant object</b>  | Each participant object may be related to one or more compensation objects.<br>See also <i>compensation object</i> .                                                                                                                                                                                                                                                            |
| <b>partner</b>             | A company that supplies products or services that are resold or purchased by the enterprise.                                                                                                                                                                                                                                                                                    |
| <b>pay cycle</b>           | In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.                                                                                                                                                                                                                                   |
| <b>payment shuffle</b>     | 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.                                                                                                                          |
| <b>pending item</b>        | 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.                                                                                                                                                                                   |

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| <b>PeopleCode</b>                            | 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.                                                                                                                                                                                                                                                                               |
| <b>PeopleCode event</b>                      | See <i>event</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>PeopleSoft Pure Internet Architecture</b> | 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.                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>performance measurement</b>               | 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.                                                                                                                                                                                                                                                                        |
| <b>period context</b>                        | 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.                                                                                                                                                                                                                                    |
| <b>person of interest</b>                    | A person about whom the organization maintains information but who is not part of the workforce.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>personal portfolio</b>                    | In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>phase</b>                                 | A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>pickup quantity</b>                       | The product quantity that the customer is taking with them from the counter sales environment.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>plan</b>                                  | 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.                                                                                                                                                                                                                                                                                                                                                                           |
| <b>plan context</b>                          | 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. |
| <b>plan template</b>                         | 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.                                                                                                                                                                                                                                                                                                              |
| <b>planned learning</b>                      | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>planning instance</b>                     | In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>population</b>                            | In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

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|                              | Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.<br><br>See also <i>division</i> and <i>cohort</i> .                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>portal registry</b>       | 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.                                                                                                                                                                                                                                   |
| <b>predecessor task</b>      | A task that you must complete before you start another task.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>price breaks</b>          | In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>price components</b>      | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>price list</b>            | 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.                                                                                                                                                                                                        |
| <b>price rule</b>            | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>price rule conditions</b> | 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.                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>price rule key</b>        | The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>primacy number</b>        | 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. |
| <b>primary name type</b>     | 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.                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>process category</b>      | In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>process group</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>process definition</b>    | Process definitions define each run request.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>process instance</b>      | 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.                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>process job</b>           | 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.                                                                                                                                                                                                                                                                                                                                                                                            |

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| <b>process request</b>     | 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.                                                                                                                                                                                                                                                             |
| <b>process run control</b> | 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.                                                                                                       |
| <b>product</b>             | 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.                                                           |
| <b>product adds</b>        | The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as <i>giveaways</i> ).                                                                                                                                                                                                                                                                                                      |
| <b>product bidding</b>     | 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.                                                                                                                                                                                                                                                               |
| <b>product category</b>    | 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.                                                                                                                                                                            |
| <b>product family</b>      | 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.                                                                                                                                                                            |
| <b>product line</b>        | 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.                                                                                                                                                                                                                                   |
| <b>programs</b>            | 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.                                                                                                                                                                        |
| <b>progress log</b>        | 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. |
| <b>project transaction</b> | In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.                                                                                                                                                                                                                                                                                                 |
| <b>promotion</b>           | 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.                                                                                                                                                                                                                                                    |
| <b>prospects</b>           | In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.<br><br>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.                                                                                                                             |
| <b>proxy bidding</b>       | 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.                                                                                                                                                                                                                                                               |

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| <b>publishing</b>              | In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>rating components</b>       | In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>record group</b>            | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>record input VAT flag</b>   | Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT. |
| <b>record output VAT flag</b>  | Abbreviation for <i>record output value-added tax flag</i> .<br>See <i>record input VAT flag</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>recname</b>                 | The name of a record that is used to determine the associated field to match a value or set of values.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>recognition</b>             | 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.                                                                                                                                                                                                                                                                                                                                                                |
| <b>reference data</b>          | In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>reference object</b>        | 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).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>reference transaction</b>   | 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.                                                                                                                                   |
| <b>regional sourcing</b>       | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>relationship object</b>     | In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>remote data source data</b> | Data that is extracted from a separate database and migrated into the local database.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

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| <b>REN server</b>           | Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.                                                                                                                                                                                                                                                                     |
| <b>requester</b>            | In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.                                                                                                                                                                                             |
| <b>reservations</b>         | In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.                                                                                                                                                                                                                                                                             |
| <b>reversal indicator</b>   | In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.                                                                                                                                                                                                              |
| <b>RFI event</b>            | In PeopleSoft Strategic Sourcing, a request for information.                                                                                                                                                                                                                                                                                                          |
| <b>RFx event</b>            | 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.                                                                                                                                                               |
| <b>role</b>                 | 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.                                                                                                                                            |
| <b>role user</b>            | 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. |
| <b>roll up</b>              | In a tree, to roll up is to total sums based on the information hierarchy.                                                                                                                                                                                                                                                                                            |
| <b>run control</b>          | 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.                                                                                                                                                                             |
| <b>run control ID</b>       | A unique ID to associate each user with his or her own run control table entries.                                                                                                                                                                                                                                                                                     |
| <b>run-level context</b>    | 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.                                                 |
| <b>saved bid</b>            | In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.                                                                                                                                                                                                                                          |
| <b>score</b>                | In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.                                                                                                                                                                                                             |
| <b>SCP SCBM XML message</b> | Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.                                                                                                                                                       |
| <b>search query</b>         | 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.                                                                                                                                                                                          |
| <b>search/match</b>         | 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.                                                                                                                                                                    |
| <b>seasonal address</b>     | 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.                                                                                                                                                                                                           |

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| <b>section</b>                 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>security event</b>          | In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>sell event</b>              | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>serial genealogy</b>        | In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>serial in production</b>    | In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>service impact</b>          | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>service indicator</b>       | 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.                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>session</b>                 | <p>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.</p> <p>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.</p> |
| <b>session template</b>        | 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.                                                                                                                                                                                                                                                                                                                                                  |
| <b>setup relationship</b>      | In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>share driver expression</b> | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>short-term customer</b>     | A customer not in the system who is entered during sales order entry using a template.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

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| <b>single signon</b>         | 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.                                                                                                                                                                                                                                                                                                   |
| <b>source key process</b>    | 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.                                                                                                                                                                                                                                                                                                    |
| <b>source transaction</b>    | 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.                                                                                                                                                                             |
| <b>sourcing objective</b>    | For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>speed key</b>             | See <i>communication key</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>SpeedChart</b>            | 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.                                                                                                                                                                                                                                                                                                                            |
| <b>SpeedType</b>             | A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.                                                                                                                                                                                                                                                                                                                                                                               |
| <b>staging</b>               | A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>standard letter code</b>  | 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.                                                                                                                                                                                                                                                                   |
| <b>statutory account</b>     | Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.                                                                                                                                                                                                                                                                                                                      |
| <b>step</b>                  | In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.                                                                                                                                                                                                                                                                                                                                                                   |
| <b>storage level</b>         | 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.                                                                                                                                                                                                                                                                            |
| <b>subcustomer qualifier</b> | A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Summary ChartField</b>    | 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).                                                                                                                                                                      |
| <b>summary ledger</b>        | 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. |
| <b>summary time period</b>   | 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.                                                                                                                                                                                                                                                                        |

|                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>summary tree</b>     | A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>syndicate</b>        | To distribute a production version of the enterprise catalog to partners.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>system function</b>  | In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>system source</b>    | <p>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).</p> <p>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).</p> |
| <b>TableSet</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>TableSet sharing</b> | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>target currency</b>  | The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>task</b>             | A deliverable item on the detailed sourcing plan.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>tax authority</b>    | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>template</b>         | 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.                                                                                                                                                                                                                                                                                                                                                        |
| <b>tenant</b>           | In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>territory</b>        | In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>third party</b>      | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>tiered pricing</b>   | Enables different portions of a schedule to be priced differently from one another.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>time span</b>        | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>total cost</b>       | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

|                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>travel group</b>                | In PeopleSoft Expenses, the organization's travel rules and policies that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.                                                                                                                                                       |
| <b>travel partner</b>              | In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>3C engine</b>                   | Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes. |
| <b>3C group</b>                    | Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.                                                                                                             |
| <b>trace usage</b>                 | 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.                                                                                                                                                                                                                                                     |
| <b>transaction allocation</b>      | 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.                                                                                                                                                                                                           |
| <b>transaction state</b>           | 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.                                                                                                 |
| <b>Translate table</b>             | 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.                                                                                                                                                                                                                                                                                                                        |
| <b>tree</b>                        | 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.                                                                                                                                                                                                                                                |
| <b>tuition lock</b>                | In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i> ) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.                                                                                                                           |
| <b>unclaimed transaction</b>       | 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.                                                                                                                                                                |
| <b>universal navigation header</b> | 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.                                                                                                                       |
| <b>update access</b>               | In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.                                                                                                                                                                                                                                                                                                                                                                     |

See also *inquiry access*.

|                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>user interaction object</b> | 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). |
| <b>variable</b>                | 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.                                                                                                                  |
| <b>VAT exception</b>           | Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.                                                                                                                                                                                                                                           |
| <b>VAT exempt</b>              | Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.                                                                                                                                                                                   |
| <b>VAT exoneration</b>         | Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.                                                                                                                                                                                                                                                                         |
| <b>VAT suspension</b>          | Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.                                                                                                                                                                                                                                                                                                                 |
| <b>warehouse</b>               | A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.                                                                                                                                                                                                                                                                                                                      |
| <b>weight or weighting</b>     | 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.                                                                                                                                                                                                                                   |
| <b>work order</b>              | 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.                                                                                                                         |
| <b>worker</b>                  | A person who is part of the workforce; an employee or a contingent worker.                                                                                                                                                                                                                                                                                                                                                                        |
| <b>workset</b>                 | 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.                                                                                                                                                                                                                           |
| <b>worksheet</b>               | 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.                                                                                                                                                                                                                                            |
| <b>worklist</b>                | 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.                                                                                                                                                                                                                                            |
| <b>XML link</b>                | The XML Linking language enables you to insert elements into XML documents to create a links between resources.                                                                                                                                                                                                                                                                                                                                   |
| <b>XML schema</b>              | An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.                                                                                                                                                                                                                                                                                                                     |
| <b>XPI</b>                     | Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.                                                                                                                                                                                                                                            |

**yield by operation**

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

**zero-rated VAT**

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



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