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PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook

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Contents

General Preface

About This PeopleBook Preface xvii

PeopleSoft Enterprise Application Prerequisites xvii

Application Fundamentals xvii

Documentation Updates and Printed Documentation xviii

Obtaining Documentation Updates xviii

Downloading and Ordering Printed Documentation xviii

Additional Resources xix

Typographical Conventions and Visual Cues xx

Typographical Conventions xx

Visual Cues xxi

Country, Region, and Industry Identifiers xxi

Currency Codes xxii

Comments and Suggestions xxii

Common Elements Used in PeopleBooks xxii

Preface

PeopleSoft Supply Chain Management Integration Preface xxv

PeopleSoft Application Fundamentals xxv

Common Elements Used in This PeopleBook xxv

Part 1
Getting Started

Chapter 1

Getting Started with Supply Chain Management Integration 3

Navigating PeopleSoft SCM Integration Documentation 3

Integration Implementation 6

Part 2
Understanding SCM Integration

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Chapter 2
Understanding PeopleSoft Supply Chain Management Enterprise Integration Points....9
PeopleSoft SCM Inbound EIPs....9
Understanding the Inbound EIP Architecture....9
PeopleSoft SCM Outbound EIPs....12
Understanding the Outbound Transaction Architecture....12
Comprehensive List of SCM EIPs....14

Chapter 3
Implementing Integrations....83
Setting Up Service Operations....83
Pages Used to Set Up Service Operations....87
Setting Up Chunking....88
Pages Used to Set Up Chunking....89
Setting Up Electronic Data Collections....90
Page Used to Set Up Electronic Data Collections....90
Setting Up Electronic Data Collections Defaults....90
Setting Up BackBone InterlinX....91
Understanding BackBone InterlinX....91
Prerequisites....92
Pages Used to Set Up Backbone InterlinX....93
Setting Up Target Sets....93
Defining Integrations....93
Implementing XML Mapper....96
Understanding XML Mapper....96
Prerequisites to Using XML Mapper....96
Pages Used to Set Up XML Mapper....97
Defining Maps....97
Defining Map Set Detail....99
Defining Map Sets....100
Defining Node Associations....101

Chapter 4
Processing Enterprise Integration Points (EIPs)....103
Processing Inbound EIPs....103
Pages Used to Process Inbound EIPs....103
Using Transaction Maintenance....103

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Using Data Definition Maintenance.....104
Purging Transactions.....107
Processing Outbound EIPs.....108
Page Used to Process Outbound EIPs.....108
Processing Outbound EIPs.....108
Processing Backbone Interlinks.....109
Page Used to Process Backbone Interlinks.....109
Running the Backbone Interlink Process.....109

Chapter 5
Reviewing EIP Examples.....111
Understanding EIP Examples.....111
Common Elements in this Chapter.....112
Setting Up the Sales Order Load EIP.....113
Understanding the Sales Order Load EIP.....113
Page Used to Set Up the Sales Order Load EIP.....114
Activating the Sales Order Load Service Operations.....114
Verifying the Queue is in Run Mode.....116
Activating the Handler.....116
Activating the Routings.....117
Confirming the Parameters of the Routing Definition.....117
Verifying the Node is Active.....118
Setting the Inbound File Rule for EDI Flat File Data.....119
Setting the Inbound File Rule for Non-EDI Flat File Data.....121
Processing the Sales Order Load EIP.....121
Pages Used to Process Sales Orders Load EIP.....122
Loading EDI Flat File Data.....122
Loading Non-EDI Flat File Data.....123
Running Electronic Commerce.....124
Correcting Errors.....125
Completing the Orders.....127
Setting Up the Sales Order Acknowledgement EIP.....128
Understanding the Sales Order Acknowledgment EIP.....128
Pages Used to Set Up the Sales Order Acknowledgement EIP.....129
Verifying Contacts.....130
Activating the Sales Order Acknowledgement Service Operation.....131
Verifying the Queue is in Run Mode.....133
Activating the Handler.....134
Activating the Routings.....134

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Confirming the Parameters of the Routing Definition.....135
Verifying the Node is Active.....136
Verifying the Node is Connected to the Network.....137
Activate the Batch Publish Rule.....138
Setting Up Chunking for the Batch Publish Rule.....139
Processing the Sales Order Acknowledgement EIP.....140
Pages Used to Process the Sales Order Acknowledgement EIPs.....141
Publishing Outbound Sales Order Acknowledgement Messages.....141
Setting Up the Purchase Order Dispatch EIP.....142
Understanding the Purchase Order Dispatch EIP.....142
Pages Used to Set Up the Purchase Order Dispatch EIP.....143
Setting the Purchase Order Dispatch Method.....144
Activating the Purchase Order Dispatch Service Operation.....145
Verifying the Queue is in Run Mode.....147
Activating the Handler.....147
Activating the Routings.....148
Confirming the Parameters of the Routing Definition.....149
Verifying the Node is Active.....150
Verifying the Node is Connected to the Network.....150
Activate the Batch Publish Rule.....151
Setting Up Chunking for the Batch Publish Rule.....152
Processing the Purchase Order Dispatch EIP.....153
Pages Used to Process the Purchase Order EIP.....154
Dispatching Purchase Orders.....154
Publishing Outbound Purchase Order Messages.....155
Setting Up the Advanced Shipping Notice EIP.....156
Understanding the Advanced Shipping Notice EIP.....156
Pages Used to Set Up the Advanced Shipping Notice EIP.....157
Enabling the Inventory Business Unit.....159
Verifying Contacts.....159
Activating the ASN Service Operation.....161
Verifying the Queue is in Run Mode.....163
Activating the Handler.....163
Activating the Routings.....164
Confirming the Parameters of the Routing Definition.....165
Verifying the Node is Active.....166
Verifying the Node is Connected to the Network.....167
Activate the Batch Publish Rule.....167
Setting Up Chunking for the Batch Publish Rule.....168
Processing the Advanced Shipping Notice EIP.....169

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Pages Used to Process the Advanced Shipping Notice EIP....170
Publishing Advanced Shipping Notices....170
Data Separation....172
Troubleshooting Information....172
Setting Up the Billing Invoice EIP....172
Understanding the Billing Invoice EIP....172
Pages Used to Process Billing Invoices....173
Verifying Contacts....175
Activating the Billing Invoice Notice Service Operation....176
Verifying the Queue is in Run Mode....178
Activating the Handler....179
Activating the Routings....179
Confirming the Parameters of the Routing Definition....180
Verifying the Node is Active....181
Verifying the Node is Connected to the Network....182
Activating the Batch Publish Rule....182
Setting Up Chunking for the Batch Publish Rule....183
Publishing Billing Invoices....184
Pages Used to Process the Billing Invoice EIP....185
Publishing Billing Invoices....185

Part 3
Integrating to Warehouse Management Systems

Chapter 6
Understanding Warehouse Management Systems....189
General WMS Integration Issues....189
System-Wide Assumptions About WMS Integration....189
WMS EIPs....191
The Order-to-Cash Business Process in a WMS Integration....194
Order Entry....196
Reservation Processing....196
Order Release Processing....196
Order Changes....198
Shipping Processing....198
The Procure-to-Pay Business Process in a WMS Integration....199
Requisitions....200
Purchase Orders....201

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Purchase Order Expected Receipts Processing.....201
Receiving.....203
Four-Wall Warehousing Functions in a WMS Integration.....204
Inventory Adjustments.....204
Storage Location Transfers (Inventory Status Updates).....205
Physical Inventory (Stock Quantity Snapshots).....205
Static Information Updates in a WMS Integration.....206
Customer Data.....207
Vendor Data.....207
Item Data.....207
Carrier and Shipping Method Data.....207
Location Data.....207

Part 4
Integrating to Healthcare Applications

Chapter 7
Integrating With a Third-Party Point-of-Use Supplier System.....211
Understanding POU Supplier Systems.....211
Assumptions About POU Supplier System Integration.....212
Definition of Items and Par Locations for a POU Supplier Integration.....212
Chunking Rules for Streamlining POU Supplier Integration Processes.....213
POU Suppliers as Par Locations in PeopleSoft Inventory.....213
RTVs for POU Supplier Items.....213
Defining Par Location Data for the POU Supplier and the PeopleSoft System.....213
Managing Item Replenishment Data in the POU Supplier and the PeopleSoft System.....214
Restocking a POU Supplier.....215
Using POU Supplier EIPs.....216
Following the Data Flow Between the PeopleSoft System and the POU Supplier System.....216
Managing Subscription Errors for POU EIPs.....217

Chapter 8
Integrating With a Third-Party Surgical Resource Software Application.....219
Understanding SRS Applications.....219
Defining Assumptions of an SRS Application Integration.....219
Defining Items and Par Locations for an SRS Application Integration.....220
Using Chunking to Streamline SRS Application Integration Processes.....220

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Creating RTVs for Surgical Resource Par Location Items.....221
Implementing an SRS Application Integration.....221
Defining Par Location Data for the SRS Application and the PeopleSoft System.....221
Stocking Case Carts From a Surgical Resource Par Location.....222
Maintaining Item Replenishment Data in the SRS Application and the PeopleSoft System.....223
Restocking a Surgical Resource Par Location.....224
Using SRS Application EIPs.....225
Managing Errors for SRS EIPs.....226

Part 5
Integrating to Electronic Data Collection Systems

Chapter 9
Designing an Electronic Data Collection System.....229
Understanding Electronic Data Collection.....229
Setting Up Electronic Data Collection Defaults.....230
Setting Up Labels.....230
Page Used to Set Up Labels.....230
Setting Up Data Collection Labels.....230
Setting Up the UCC/EAN Manufacturer ID.....231
Pages Used to Set Up the UCC/EAN Manufacturer ID.....231
Specifying the Manufacturer ID.....231
Setting Up the Wedge Command Code.....231
Setting Up Unit of Measure.....232
Setting Up Picking.....232
Setting Up Putaway.....232

Chapter 10
Using an Electronic Data Collection System.....233
Understanding Electronic Data Collection.....233
Device Selection.....234
Using Electronic Data Collection Transactions.....235
Using Background Transaction Processes.....237
Purging Transactions.....239
Generating Labels.....239
Managing Files.....240
Common Elements Used in This Section.....242

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Pages Used to Print Labels....243
Printing Purchasing Receipt Labels....244
Printing Completion Labels....245
Printing Pull Ticket Labels....246
Printing Kanban Card Labels....246
Selecting the Kanban Card Label Range....247
Printing Storage Location Labels....247
Printing Item Storage Labels....248
Printing Storage Container Labels....249
Printing Shipping Carton Labels....249
Printing Shipping Serial Labels....252
Printing Shipping Container Label....252

Chapter 11
Understanding Record Layouts for the Electronic Data Collection System....255
Par Location Count and Physical Accounting File Formats....255
Par Location Count....255
Physical Accounting....259
Label Extract File Record Definitions....261
Item Usage Label....262
Item Storage Label....262
Storage Container Label....263
Storage Location Label....263
Shipping Carton Label....264
Shipping Container Label....268
Shipping Serial Number Label....270
Production Completion Label....270
Purchasing Receipt Label....272
Kanban Card and Pull Ticket Label....273
Picking Plan Extract File Record Definitions....275
Inventory Picking Extract File Format....276
Manufacturing Picking Extract File Format....280

Part 6
Integrating with Transportation Management Systems

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Chapter 12
Integrating with Transportation Management Systems.....289
Understanding the Transportation Management System Integration with PeopleSoft Inventory.....289
Setting Up PeopleSoft for TMS Integration.....291
Pages Used to Set Up PeopleSoft for TMS Integration.....292
Setting up the TMS Integration.....292
Publishing the TMS Order Release EIP.....293
Understanding the TMS Order Release Process.....293
Pages Used to Publish the TMS Order Release EIP.....295
Sending TMS Data from PeopleSoft Inventory to the TMS.....295
Communicating Order Changes to the TMS.....296
Understanding TMS Processing.....297
Receiving the Load Notification EIP.....297
Understanding the Load Notification EIP Process.....298
Pages Used to Subscribe to the Load Notification EIP.....299
Uploading TMS Data from the TMS to PeopleSoft Inventory.....299
Viewing and Correcting Errors.....300

Part 7
Integrating with PeopleSoft CRM

Chapter 13
Integrating with PeopleSoft CRM.....305
Understanding PeopleSoft SCM Integration with PeopleSoft CRM.....305
Common Object Integrations.....305
PeopleSoft Order Management Integration with PeopleSoft Order Capture.....306
PeopleSoft Billing Integration with PeopleSoft CRM 360 Degree View.....306
PeopleSoft SCM Integration with PeopleSoft FieldService.....307
Using CRM EIPs.....307
CRM EIPs.....307

Part 8
Integrating with Supply Chain Business Modeler

Chapter 14
Integrating with Supply Chain Business Modeler.....321

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Understanding the PeopleSoft Supply Chain Management Integration with the Supply Chain Business Modeler....321
Exporting Data to Supply Chain Business Modeler....326
Page Used to Export Data to Supply Chain Business Modeler....327
Exporting Data to Supply Chain Business Modeler....327
Importing Data From Supply Chain Business Modeler....330
Page Used to Import Data From Supply Chain Business Modeler....330
Importing Data From Supply Chain Business Modeler....330

Part 9
Integrating with Sales and Use Tax Applications

Chapter 15
Calculating Sales and Use Tax in Supply Chain Management....335
Understanding PeopleSoft Tax Solutions....335
Comparing PeopleSoft Tax Tables to Third-Party Tax Vendors....335
Understanding Tax Integration Technologies....336
Setting Up Third-Party Tax Solutions....337
Understanding Tax Product Groups....339
Associating Address Information with Geocodes....340
Understanding Geocodes....340
Page Used to Associate Address Information with Geocodes....341
Associating Addresses with Geocodes....341
Interacting with Third-Party Tax Vendors....341
Interacting with Third-Party Tax Solutions During Geocode Lookup....343
Interacting with Third-Party Tax Vendors During Online Tax Calculations....344
Interacting with Third-Party Tax Vendors During Invoicing....345
Interacting with Third-Party Tax Vendors During the Order Completion Process....345
Viewing Tax Calculation Errors in PeopleSoft Billing....345
Viewing Errors When Calculating Taxes Online....345
Viewing Errors When Calculating Taxes Through the Invoicing Process....346
Reviewing Third-Party Tax Liability Reporting....346
Comparing U.S. and Canadian Tax Support....346
Reviewing and Modifying Tax Jurisdiction Level Translation....347
Understanding Tax Authority Code Translation....347
Pages Used to Modify the Vertex O Series Tax Jurisdiction Translation Map....347
Modifying the Vertex O Series Tax Jurisdiction Translation Map....348

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Chapter 16
Integrating With Vertex O Series.....349
Understanding PeopleSoft Integration With Vertex O Series.....349
Configuring Vertex O Series Integration.....350
Pages Used to Configure Vertex O Series Integration.....350
Activating the TAX_INTEGRATION Service Operation Queue.....350
Activating the Service Operations.....351
Activating the Routings.....351
Activating the PSFT_TAX Node.....351
Setting Up PeopleSoft Installation Options for Vertex O Series.....352
Testing the Vertex O Series Integration.....353

Chapter 17
Integrating With Vertex Q Series.....355
Understanding PeopleSoft Business Interlinks to Vertex Q Series.....355
Identifying Vertex Q Series Plug-in Locations.....356
Identifying Vertex Q Series DLLs and Shared Library Locations.....357
Setting Up Variables for the Vertex Database Location.....357
Setting Up Vertex on a Microsoft Windows NT or Windows 2000 Platform.....357
Setting Up Vertex on a UNIX Platform.....359
Setting Up PeopleSoft Installation Options for Vertex Q Series.....359
Testing the Vertex Q Series Installation.....359
Troubleshooting Installation Errors.....359

Chapter 18
Integrating With Taxware Enterprise.....361
Understanding PeopleSoft Integration With Taxware Enterprise.....361
Configuring Taxware Enterprise Integration.....362
Pages Used to Configure Taxware Enterprise Integration.....362
Activating the TAX_INTEGRATION Service Operation Queue.....362
Activate the Service Operations.....362
Activating the Routings.....363
Activating the PSFT_TAX Node.....363
Setting Up PeopleSoft Installation Options for Taxware Enterprise.....363
Testing the Taxware Enterprise Integration.....364

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Chapter 19
Integrating with Taxware Sales and Use Tax.....365
Understanding PeopleSoft Business Interlinks to Taxware Sales and Use Tax.....365
Identifying Taxware Plug-in Locations.....366
Identifying Taxware DLLs and Shared Library Locations.....367
Setting Up Variables for the Taxware Database Location.....367
Setting Up Taxware on a Microsoft Windows NT or Windows 2000 Platform.....367
Setting Up Taxware on a UNIX Platform.....368
Setting Up PeopleSoft Installation Options for Taxware Sales and Use Tax.....368
Testing the Taxware Sales and Use Tax Installation.....369
Troubleshooting Installation Errors.....369

Glossary of PeopleSoft Enterprise Terms.....371

Index 397

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About This PeopleBook Preface

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

This preface discusses:

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

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft Enterprise applications are defined in this preface.

PeopleSoft Enterprise Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft Enterprise applications.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft Enterprise applications most effectively.

Application Fundamentals

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

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

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The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

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

Obtaining Documentation Updates

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

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

See Also

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

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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:

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- Order printed, bound volumes.

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

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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

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Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft Enterprise system.

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

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Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

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

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

Common Elements Used in PeopleBooks

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

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

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PeopleSoft Supply Chain Management Integration Preface

This preface discusses:

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

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

PeopleSoft Application Fundamentals

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

The following companion PeopleBooks apply specifically to the *PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook*.

- *PeopleSoft Enterprise Applications Fundamentals 9.0 PeopleBook*
- *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*
- *PeopleSoft Enterprise Components PeopleBook*

Common Elements Used in This PeopleBook

As of Date	The first date for which a report or process includes data.
BU or Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Freeflow text up to 256 characters.
Short Description	Freeflow text up to 15 characters.
Effective Date	Date which a table row becomes effective; the date that an action begins. For example, if you want to close a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can

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	view and change the information. Pages and batch processes that use the information use the current row. See *Enterprise PeopleTools 8.48 PeopleBook: Using PeopleSoft Applications*
Language or Language Code	The language of the field labels and report headings of reports to print. The filed values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Process Frequency	Designates the appropriate frequency to process: *Once*: executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to *Don't Run*. *Always Executes*: executes the request every time the batch process runs. *Don't Run*: Ignores the request when the batch process runs.
Process Monitor	View the status of submitted process requests. See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler*
Report ID	The report identifier.
Report Manager	View report content, check the status of a report, and see detailed messages. See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler*
Run Control ID	A request identification that represents a set of selection criteria for a report or process.
Run	Specify the location where a process or job runs and the process output format.
Status	Check the progress of a report or process. A valid status is *Posted*, *Not Posted*, *Generated*, *Processing*, or *Scheduled*.
User ID	The system identifier for the individual who generates a transactions.
Instance or Prcs Instance	The number that represents where the request is in the queue.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Designer

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PART 1

Getting Started

Chapter 1
Getting Started with Supply Chain Management Integration

CHAPTER 1

Getting Started with Supply Chain Management Integration

This section discusses supply chain management (SCM) integration documentation and implementations.

Navigating PeopleSoft SCM Integration Documentation

If you are using integration with the PeopleSoft Supply Chain Management (SCM) applications, please refer to this chapter to find the information you need.

PeopleSoft SCM provides powerful integration technology. You can integrate with specific application vendors or share transaction or definitional data directly with suppliers or customers.

We have information organized for functional users and technical implementers on how to set up and use enterprise integration points (EIPs) in PeopleSoft Supply Chain Management.

Integration Information Flow

When you're learning about EIPs, it is suggested that you follow the following order of information:

Step	Documentation	Type of Information	Primary Audience
Learning what EIPs are delivered with your application.	Application PeopleBooks	Functional descriptions of EIPs	Power users and managers
A high level understanding of the EIP architecture, and the types of technologies for which SCM delivers EIPs.	*PeopleSoft Enterprise Supply Chain Management Integration PeopleBook*	EIP overview information Descriptions of EIP groups integrating to specific technologies (warehouse management systems, electronic data collection, and so forth)	Power users and managers
How to set up EIPs and understand the delivered design patterns.	*PeopleSoft Enterprise Components PeopleBook*	EIP setup information Design pattern descriptions	Functional and technical implementers

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Step	Documentation	Type of Information	Primary Audience
Mapping EIP data	Interactive Services Repository	Technical details for each EIP	Functional and technical implementers
Creating or customizing EIPs	*Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*	Information on using this technology to create your own EIPs	Functional and technical implementers

Power Users and Managers

If you are looking for information on which EIPs to use and what they can do for you, you can find overview information as follows.

Area	Location
Overview of EIPs and integration technology	See Part 2, "Understanding SCM Integration," page 7. See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, "Understanding Enterprise Integration". See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, "Understanding Integration Points".
Functional description of individual EIPs.	The respective application PeopleBook.
EDI information	See *PeopleSoft Enterprise Electronic Data Interchange 9.0 PeopleBook*, "Understanding Electronic Data Interchange".
Warehouse Management Systems information	See Part 3, "Integrating to Warehouse Management Systems," page 187.
Healthcare application information	See Part 4, "Integrating to Healthcare Applications," page 209.
Electronic data collection information	See Part 5, "Integrating to Electronic Data Collection Systems," page 227.
Sales and Use Tax information	See Part 9, "Integrating with Sales and Use Tax Applications," page 333.
Transportation Management information	See Part 6, "Integrating with Transportation Management Systems," page 287.

Functional and Technical Implementers

Resources for technical information are in the Enterprise Integration section of the *PeopleSoft Enterprise Components PeopleBook, Enterprise PeopleTools 8.48 PeopleBook: Integration Broker,* and the Interactive Services Repository. There are also specific overview sections and examples in the *PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook*.

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Area	Location
EIP setup information	See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, “Activating Integration Points”. See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, “Assigning Publishing Rules”. See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, “Using the Effective Date Publish Utility”. See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, “Using the Flat File Utility”.
Chunking information	See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, “Assigning Publishing Rules,” Setting Up Message Chunking. See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, “Assigning Publishing Rules”.
EIP processing Information	See Chapter 4, “Processing Enterprise Integration Points (EIPs),” Processing Inbound EIPs, page 103. See Chapter 4, “Processing Enterprise Integration Points (EIPs),” Processing Outbound EIPs, page 108. See Chapter 5, “Reviewing EIP Examples,” page 111. The respective application PeopleBook.
Inbound error handling	See Chapter 4, “Processing Enterprise Integration Points (EIPs),” Processing Inbound EIPs, page 103. See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, “Using the Error Handling Utility”.
General technical information	*Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*
Technical details for each EIP	See http://www.peoplesoft.com/corp/en/iou/isr/index.jsp
Inbound EIP (subscribe) specific information	See Chapter 4, “Processing Enterprise Integration Points (EIPs),” Processing Inbound EIPs, page 103. See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, “Using the Error Handling Utility”. See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, “Using the Flat File Utility”.
Outbound EIP (publish) specific information	See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, “Assigning Publishing Rules”. See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, “Using the Effective Date Publish Utility”. See *PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook*, “Using the XML Schema Utility”.

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See Also

http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

Part 2, “Understanding SCM Integration,” page 7

Integration Implementation

There are no table-loading implementation steps for integrations. 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 Applications Fundamentals 9.0 PeopleBook,* with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, “Getting Started With PeopleSoft Enterprise Application Fundamentals”

PeopleSoft Enterprise Financials, Enterprise Service Automation, Asset Lifecycle Management Portal Packs 9.0 PeopleBook, “Configuring PeopleSoft Financials, Enterprise Service Automation, Asset Lifecycle Management Portal Packs”

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PART 2

Understanding SCM Integration

Chapter 2
Understanding PeopleSoft Supply Chain Management Enterprise Integration Points

Chapter 3
Implementing Integrations

Chapter 4
Processing Enterprise Integration Points (EIPs)

Chapter 5
Reviewing EIP Examples

CHAPTER 2

Understanding PeopleSoft Supply Chain Management Enterprise Integration Points

This chapter discusses:

- PeopleSoft Supply Chain Management (SCM) Inbound Enterprise Integration Points (EIPs).
- PeopleSoft SCM Outbound EIPs.
- Comprehensive list of SCM EIPs.

PeopleSoft SCM Inbound EIPs

Third-party systems can send information to PeopleSoft applications using a number of integration points established throughout the system. Depending on the application, various technologies provide multiple options for interacting with the PeopleSoft system. Each option provides audit trails, validations, and error handling to insure that data integrity is maintained within the PeopleSoft database.

Understanding the Inbound EIP Architecture

Depending on the requirements of the interacting system and the integration point within the PeopleSoft system, various technologies are used to receive transactions into the PeopleSoft system.

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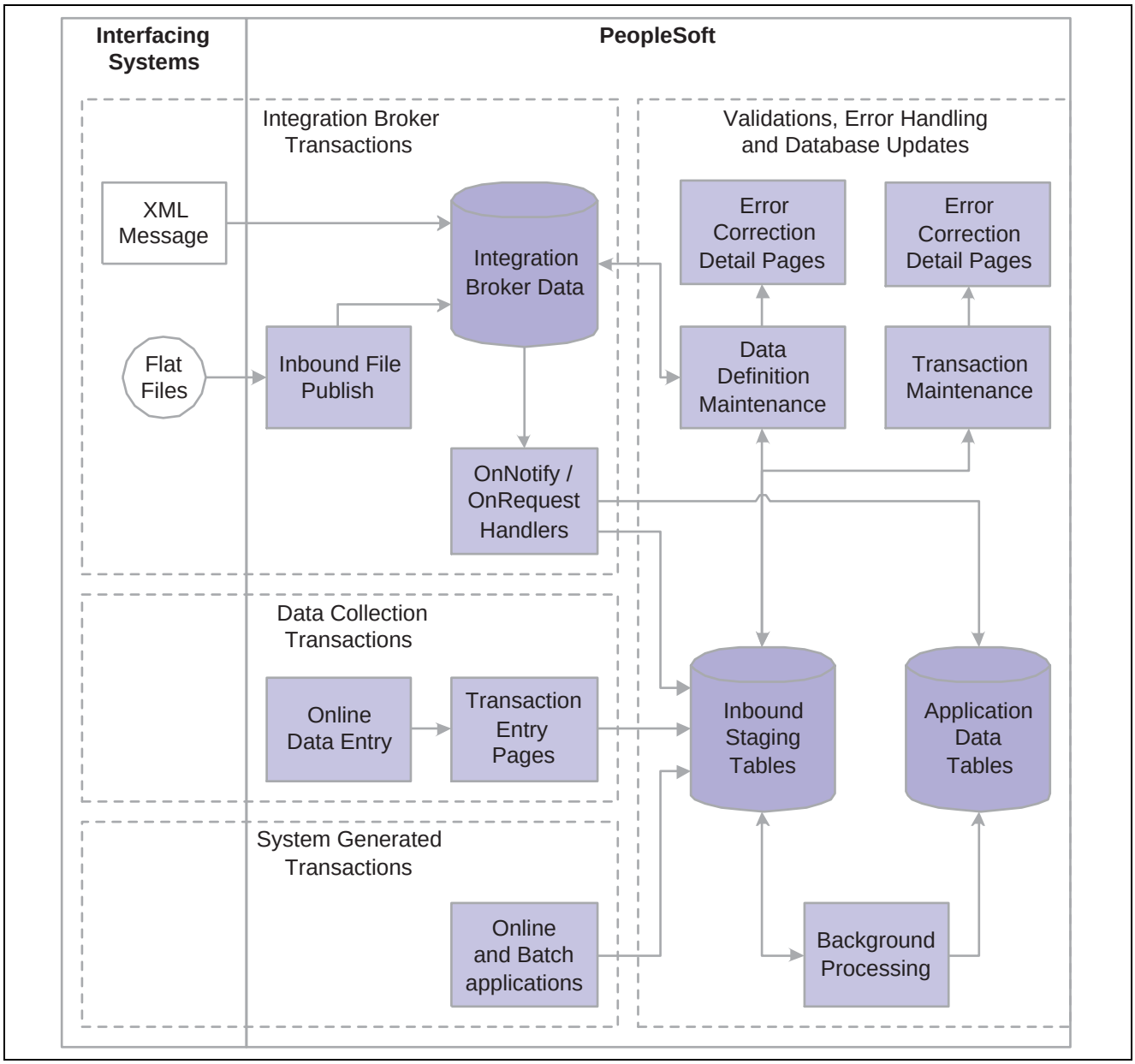

Inbound transaction flow

Integration Broker Based Transaction

The PeopleSoft Integration Broker provides a method for communications between external systems and PeopleSoft applications using industry standard XML-formatted transactions. Transactions are automatically loaded into the PeopleSoft system by handlers associated with each service operation. Once transactions have been loaded into the PeopleSoft system, you can view all transactions in the transaction log and access detail pages that enable you to correct transaction errors. Most asynchronous EIPs load data into staging tables where background programs validate and process individual transactions within the service operation instance.

The Inbound File Publish utility, which utilizes the File Layout Object tool, may also be used to automatically convert flat file input to XML-based service operations. Examples are provided showing how to use this utility, and many PeopleSoft SCM electronic data interchange (EDI) transactions have been set up to take advantage of this feature.

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See *PeopleSoft Enterprise Electronic Data Interchange 9.0 PeopleBook*, "Understanding Electronic Data Interchange".

Electronic Data Collection Transaction Pages

PeopleSoft SCM includes transaction pages for many of the inbound asynchronous transactions. The transaction pages are designed for quick data entry. There are minimal edits, and no application database updates are performed in these pages as the background programs scanning the transaction logs handle detail processing. The transaction pages provide a method of quick data entry for much of the transaction-based information processed by the system. You can enter the transactions directly onto the page, or attach a wedge and bar code reader to take advantage of bar code scanning benefits.

System-Generated Transactions

Several transactions that are fed in the transaction log are generated from internal application programs. By generating these transactions, applications push heavy processing functions to a background mode.

Validations, Error Handling, and Database Updates

Most inbound transactions, no matter which technology delivers them to the PeopleSoft system, are loaded into staging tables, where they are validated by background routines scanning these transaction logs awaiting incoming work. If errors are found, the transaction status in the transaction log is changed to *Error,* and rows are inserted into error tables for each error message.

Error messages appear on the Transaction Maintenance page for transactional type data such as, inventory adjustments and purchase order receipts. For definitional type data such as item master and bills of material, the Data Definition page is used to review and correct the erroneous information.

Once you have corrected the information and saved the page, the transaction is ready to be reprocessed.

Some transactions provide functionality to immediately validate and update application tables from subscription processes. For example, the Consumer and Par Location Count transactions both attempt to update the application tables, but if errors are found, the transactions write the data to the error tables so that corrections can be made.

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See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook, "Enterprise Integration"

PeopleSoft Enterprise Electronic Data Interchange 9.0 PeopleBook, "Understanding Electronic Data Interchange"

Chapter 10, "Using an Electronic Data Collection System," page 233

PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, "Issuing Material to Production," Issuing Material Using Electronic Data Collection

PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, "Issuing Material to Production," Processing Picking Plans Using Electronic Data Collection

PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, "Issuing Material to Production," Processing Kit Issues and Returns Using Electronic Data Collection

PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, "Recording Completions and Scrap Using Electronic Data Collection," Recording Completions Using Electronic Data Collection

PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, "Recording Completions and Scrap Using Electronic Data Collection," Processing Other Electronic Data Collection Transactions

Chapter 4, "Processing Enterprise Integration Points (EIPs)," Using Transaction Maintenance, page 103

Chapter 4, "Processing Enterprise Integration Points (EIPs)," Using Data Definition Maintenance, page 104

PeopleSoft SCM Outbound EIPs

Outbound EIPs exist throughout the PeopleSoft system, providing interface points for third-party applications requiring information as activity occurs within the PeopleSoft system. Most of these integrations utilize PeopleSoft Integration Broker technology to format and send industry standard XML service operations. For example, as item master information is entered into PeopleSoft applications, the system uses XML-based service operations to notify third-party systems enabling them to use this information to maintain their own item master tables.

Understanding the Outbound Transaction Architecture

PeopleSoft SCM applications as well as interacting third-party systems have various processing and timing requirements that dictate when information can be generated or received. For this reason, the integration points provided by PeopleSoft utilize a number of different approaches when generating outbound service operations.

For example, a third-party system requiring item master information from the PeopleSoft Inventory application may want immediate incremental updates as information is changed online, or may want periodic updates on a nightly or weekly basis. The Item Master EIP provides both options, giving the third-party system the choice as to how it wants to receive this information.

Component or Incremental Publish

The system generates an incremental transaction immediately upon saving a component in various PeopleSoft applications. Components used to maintain information such as items or customers utilize the Component Publish approach.

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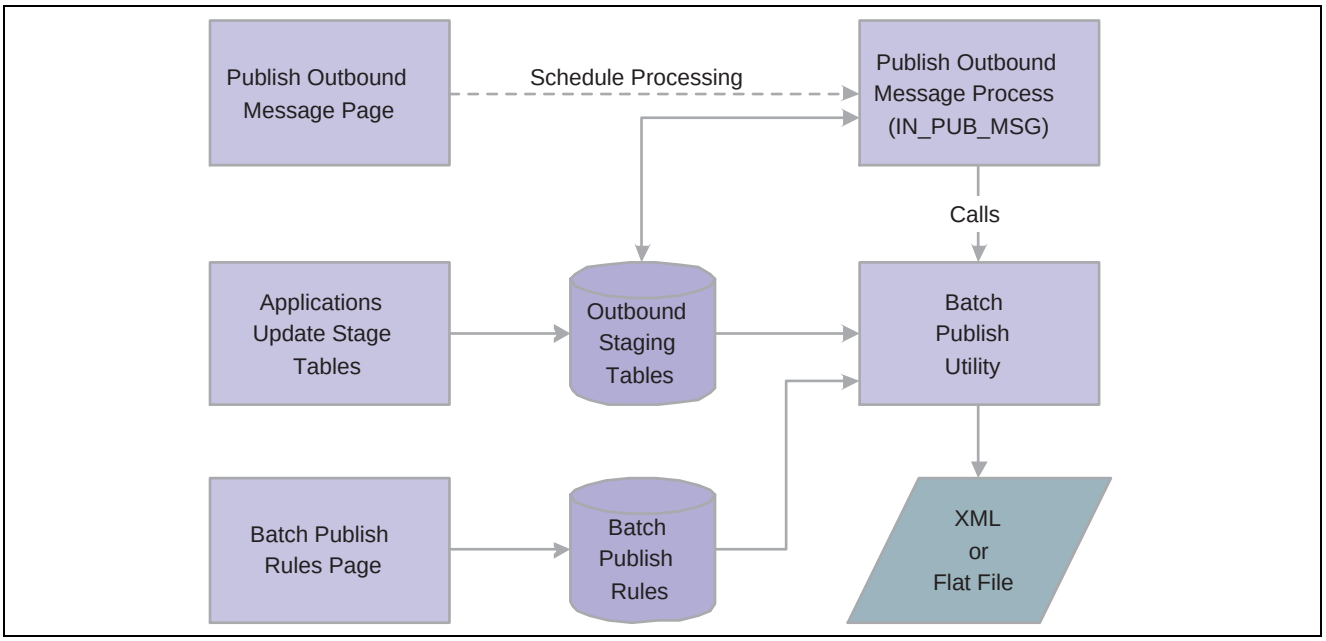
Batch Publish

This diagram illustrates the batch publish process flow:



Supply chain management batch publish process flow

The Integration Broker enables grouping many like transactions into a single service operation. Background processes that work on batches of transactions at one time utilize this approach.

In addition, other processes use this approach where interface requirements demand various groupings of like transactions based on common information within each transaction. For example, an Advanced Shipping Notice service operation can be sent to a customer when the customer's order is shipped within the PeopleSoft Inventory system. This transaction may go directly to the customer or it may go through third-party software that converts the XML to one of the industry standard EDI formats, such as X.12, before passing it on to the customer. Using the options available with the Batch Publish approach, users can dictate whether to create a single service operation for all customers to send to the third-party software or create individual service operations to send directly to each customer.

PeopleSoft SCM applications all use the Publish Outbound Message process to initiate the Batch Publish of outbound EIPs. Built into this routine is the Batch Publish utility, a common PeopleSoft tool that provides the functionality to group and filter or chunk transactions as noted in the previous example.

The Batch Publish utility also provides the option to create flat files instead of XML-based output, when file layout objects exist for transactions being generated. File layout objects are easy to modify, and PeopleSoft provides examples for all transactions included in the EDI feature.

See *PeopleSoft Enterprise Electronic Data Interchange 9.0 PeopleBook*, "Understanding Electronic Data Interchange".

Full Data Replication

Full data replication is the process used to seed, or initially populate or repopulate, a copy of an entire table onto a remote database or legacy system. The entire contents of the table are published to all systems that require a copy of the table. Generally, full data replication occurs with setup tables, or, relatively static, low volume tables keyed by setID.

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Once a copy of the table exists, incremental updates provide a mechanism or process to keep the copy up-to-date with changes made on the master. Incremental updates occur most often with transaction tables, or frequently updated tables keyed by business unit.

Most full data replication service operation names end in _FULLSYNC.

Comprehensive List of SCM EIPs

PeopleSoft SCM provides a comprehensive group of inbound and outbound EIPs for you to use. This table lists all the EIPs deliverd by SCM and provides cross reference information to the PeopleSoft applications that utilize that EIP.

See http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

Note. Some of the EIPs are shared by multiple SCM applications. Those EIPs that are shared are listed in the table under the primary application that maintains that EIP.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Billing and PeopleSoft Order Management	Credit Card Authorize, Bill and Credit	CREDITCARD_TRANSACTION	Outbound	Sync	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Processing Credit Cards".
PeopleSoft Billing	CRM 360 Degree View	BI_EIP360_REQ BI_EIP360_RSP	Inbound	Sync	See *PeopleSoft Enterprise Billing 9.0 PeopleBook*, "Integrating PeopleSoft CRM with Billing," Activating the Service Operation.
PeopleSoft Billing	Billing Invoice	BILLING_INVOICE_NOTICE	Outbound	Async	See *PeopleSoft Enterprise Billing 9.0 PeopleBook*, "Processing EDI Transactions in PeopleSoft Billing".
PeopleSoft Billing	Billing Invoice	EDI_TXN_810 **Note.** EDI_TXN_810 is the BILLING_INVOICE_ NOTICE in X.12 EDI format.	Outbound	Async	See *PeopleSoft Enterprise Billing 9.0 PeopleBook*, "Processing EDI Transactions in PeopleSoft Billing".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Billing	Bill Source Fullsync	BILL_SOURCE_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Billing 9.0 PeopleBook*, "Integrating PeopleSoft CRM with Billing," Setting up Bill Type, Bill Source, and Tax Header EIPs.
PeopleSoft Billing	Bill Source Sync	BILL_SOURCE_SYNC	Outbound	Async	See *PeopleSoft Enterprise Billing 9.0 PeopleBook*, "Integrating PeopleSoft CRM with Billing," Setting up Bill Type, Bill Source, and Tax Header EIPs.
PeopleSoft Billing	Bill Type Fullsync	BILL_TYPE_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Billing 9.0 PeopleBook*, "Integrating PeopleSoft CRM with Billing," Setting up Bill Type, Bill Source, and Tax Header EIPs.
PeopleSoft Billing	Bill Type Sync	BILL_TYPE_SYNC	Outbound	Async	See *PeopleSoft Enterprise Billing 9.0 PeopleBook*, "Integrating PeopleSoft CRM with Billing," Setting up Bill Type, Bill Source, and Tax Header EIPs.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Billing, Order Management, Purchasing, and Accounts Payable	Geocode Request	GET_GEOCODE_REQ GET_GEOCODE_RES **Note.** These EIPs can be used with any third-party tax calculation systems.	Outbound	Sync	See Chapter 18, "Integrating With Taxware Enterprise," page 361.
PeopleSoft Billing and PeopleSoft Order Management	Tax Calculation	TAXWARE_CALCTAX	Outbound	Sync	See Chapter 15, "Calculating Sales and Use Tax in Supply Chain Management," page 335.
PeopleSoft Billing and PeopleSoft Order Management	Tax Calculation	VERTEX_CALCTAX	Outbound	Sync	See Chapter 15, "Calculating Sales and Use Tax in Supply Chain Management," page 335.
PeopleSoft Billing, Order Management, Purchasing, and Accounts Payable	Tax Calculation Request	DO_TAXCALC_REQ DO_TAXCALC_RES **Note.** These EIPs can be used with any third-party tax calculation systems.	Outbound	Sync	See Chapter 18, "Integrating With Taxware Enterprise," page 361.
PeopleSoft Billing	Tax Code Fullsync	TAX_HEADER_TBL_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Billing 9.0 PeopleBook*, "Integrating PeopleSoft CRM with Billing," Setting up Bill Type, Bill Source, and Tax Header EIPs.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Billing and PeopleSoft Order Management	Tax Geocode	TAXWARE_GEOCODES	Outbound	Sync	See Chapter 15, "Calculating Sales and Use Tax in Supply Chain Management," Associating Address Information with Geocodes, page 340. See Part 9, "Integrating with Sales and Use Tax Applications," page 333.
PeopleSoft Billing and PeopleSoft Order Management	Tax Geocode	VERTEX_GEOCODES	Outbound	Sync	See Chapter 15, "Calculating Sales and Use Tax in Supply Chain Management," Associating Address Information with Geocodes, page 340. See Part 9, "Integrating with Sales and Use Tax Applications," page 333.
PeopleSoft Billing, Order Management, Purchasing, and Accounts Payable	Vertex Tax Area Request	GET_VERTEX_TAXAREA_REQ GET_VERTEX_TAXAREA_RES	Outbound	Sync	See Chapter 16, "Integrating With Vertex O Series," page 349.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Billing, Order Management, Purchasing, and Accounts Payable	Vertex Tax Calculation Request	DO_VERTEX_TAXCALC_REQ DO_VERTEX_TAXCALC_RES	Outbound	Sync	See Chapter 16, "Integrating With Vertex O Series," page 349.
PeopleSoft Enterprise Pricer	Arbitration Plan	ARBITRATION_PLAN_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Arbitration Plan	ARBITRATION_PLAN_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Arbitration Plan	ARBITRATION_PLAN_SYNC	Inbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Arbitration Plan	ARBITRATION_PLAN_SYNC	Outbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Enterprise Pricer	Price List	PRICE_LIST_DETAIL_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Price List	PRICE_LIST_DETAIL_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Price List	PRICE_LIST_DETAIL_SYNC	Inbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Price List	PRICE_LIST_DETAIL_SYNC	Outbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Price List	PRICE_LIST_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Enterprise Pricer	Price List	PRICE_LIST_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Price List	PRICE_LIST_HEADER_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Price List	PRICE_LIST_HEADER_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Price List	PRICE_LIST_HEADER_SYNC	Inbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Price List	PRICE_LIST_HEADER_SYNC	Outbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Enterprise Pricer	Price List	PRICE_LIST_SYNC	Inbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Price List	PRICE_LIST_SYNC	Outbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Price Rule	PRICE_RULE_DATA_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Price Rule	PRICE_RULE_DATA_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Price Rule	PRICE_RULE_DATA_SYNC	Inbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Enterprise Pricer	Price Rule	PRICE_RULE_DATA_SYNC	Outbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Price Rule	PRICE_RULE_KEYS_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft Enterprise Pricer	Price Rule	PRICE_RULE_KEYS_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Pricer 9.0 PeopleBook*, "Using Pricing Data Enterprise Integration Points".
PeopleSoft eProcurement	Direct Connect	PV_CXML1_ORDER	Outbound	Sync	See *PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, "Integrating with Direct Connect Suppliers".
PeopleSoft eProcurement	Direct Connect	PV_CXML1_POOM	Outbound	Sync	See *PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, "Integrating with Direct Connect Suppliers".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft eProcurement	Direct Connect	PV_CXML1_POSR	Outbound	Sync	See *PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, "Integrating with Direct Connect Suppliers".
PeopleSoft eProcurement	ePro Availability Check	PV_AVAIL_CHECK_REQ PV_AVAIL_CHECK_RESP	Outbound	Sync	See *PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, "Using PeopleSoft eProcurement with a Marketplace," Using Price and Availability Check.
PeopleSoft eProcurement	ePro Direct Connect	PV_DC_CONNECT_REQST PV_DC_CONNECT_RESP	Outbound	Sync	See *PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, "Integrating with Direct Connect Suppliers," Setting Up Direct Connect.
PeopleSoft eProcurement	ePro Direct Connect	PV_ORDER_REQ PV_ORDER_RESP	Outbound	Sync	See *PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, "Using PeopleSoft eProcurement with a Marketplace," Activating Service Operations.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft eProcurement	ePro Order Status	PV_ORD_STS_REQ PV_ORD_STS_RESP	Outbound	Sync	See *PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, "Using PeopleSoft eProcurement with a Marketplace," Activating Service Operations.
PeopleSoft eProcurement	ePro Price Check	PV_PRICE_CHECK_REQ PV_PRICE_CHECK_RESP	Outbound	Sync	See *PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, "Using PeopleSoft eProcurement with a Marketplace," Activating Service Operations.
PeopleSoft eProcurement	ePro Procurement Order	PV_ORDER	Outbound	Async	See *PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, "Using PeopleSoft eProcurement with a Marketplace," Activating Service Operations.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft eProcurement	ePro xCBL Order	PV_ORDER_XCBL3	Outbound	Async	See *PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, "Dispatching Purchase Orders in PeopleSoft eProcurement," Setting Up Dynamic Dispatching.
PeopleSoft eProcurement	ePro Requisition Approval email	PV_EMAIL_REQ_APPROVAL	Inbound	Async	See *PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, "Using Approval Workflow Within PeopleSoft eProcurement," Setting Up Email Approvals for eProcurement. See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Using Workflow and Managing Approvals".
PeopleSoft eProcurement	Marketplace Integration	PV_MS_PODISPATCH	Outbound	Sync	See *PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, "Integrating with Direct Connect Suppliers".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Flow Production	Kanban ID Import and Replenishment Request	PRODUCTION_REPLENISHMENT_REQ	Inbound	Async	See *PeopleSoft Enterprise Flow Production 9.0 PeopleBook*, "Maintaining Kanban Cards and Replenishment Requests".
PeopleSoft Flow Production	Replenishment Request Dispatch	REPLENISHMENT_REQUEST_DISPATCH	Outbound	Async	See *PeopleSoft Enterprise Flow Production 9.0 PeopleBook*, "Maintaining Kanban Cards and Replenishment Requests".
PeopleSoft Inventory	Advance Shipping Notice	ADVANCED_SHIPPING_NOTICE	Outbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Creating Shipping Documentation," Creating Advanced Shipping Notices.
PeopleSoft Inventory	Consumer	CONSUMER_SYNC	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Tracking Material Usage," Importing Consumer Information with the Consumer Message EIP.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Inventory	Consumer Usage	CONSUMER_USAGE	Outbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Tracking Material Usage," Exporting Consumer Usage Information.
PeopleSoft Inventory	X.12 EDI Advance Shipping Notice	EDI_TXN_856	Outbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Creating Shipping Documentation," Creating Advanced Shipping Notices.
PeopleSoft Inventory and PeopleSoft Purchasing	Get PO IUT	GET_POIUT_INFO	Inbound	Sync	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Understanding Order Fulfillment Processing," Purchase Order and InterUnit Transfer Information Business Interlink.
PeopleSoft Inventory	GTIN Data Notification	GTIN_DATA_NOTIFICATION	Outbound	Async	See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Working with Items," Using Universal Item Identifiers.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Inventory	Inventory Stock Level Inquiry	IN_STOCK_LEVELS IN_STOCK_LEVELS	Outbound	Sync	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Inquiring and Reporting About On-Hand Stock," Viewing Item Balances.
PeopleSoft Inventory	Internal Location Expected Receipt	INTERNAL_LOC_EXPECTED_RECEIPT	Outbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Creating Shipping Documentation," Creating Internal Location Expected Receipts.
PeopleSoft Inventory	Interunit Expected Receipt	INTERUNIT_EXPECTED_RECEIPT	Outbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Creating Shipping Documentation," Creating Interunit Expected Receipts.
PeopleSoft Inventory	Interunit Receipt	INTERUNIT_RECEIPT	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Receiving and Putting Away Stock," Staging Interunit Transfers Using an Electronic Data Collection System.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Inventory	Inventory Adjustment	INVENTORY_ADJUSTMENT	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Making Stock Quantity Adjustments and Transfers Within the Business Unit," Making Adjustments Using the Inventory Adjustments EIP.
PeopleSoft Inventory	Inventory Balance Notification	INV_BAL_NOTIF_BUS_UNIT	Outbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Inquiring and Reporting About On-Hand Stock," Providing Inventory Balances to Third-Party Systems.
PeopleSoft Inventory	Inventory Balance Notification	INV_BAL_NOTIF_VENDOR	Outbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Inquiring and Reporting About On-Hand Stock," Providing Inventory Balances to Third-Party Systems.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Inventory	Inventory by Location	INVENTORY_BY_LOC_REQ INVENTORY_BY_LOC_RSP	Inbound	Sync	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Inquiring and Reporting About On-Hand Stock," Providing Inventory Balances to Third-Party Systems.
PeopleSoft Inventory	Inventory Front End Shipping	INVENTORY_FRONT_END_SHIPPING	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Utilizing the Fulfillment Engine," Setting up the Fulfillment Engine EIPs.
PeopleSoft Inventory	Inventory Pick Confirm	INVENTORY_PICK_CONFIRM	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Utilizing the Fulfillment Engine," Setting up the Fulfillment Engine EIPs.
PeopleSoft Inventory	Inventory Picking	INVENTORY_PICKING	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Picking Inventory," Entering Picking Feedback Using an Electronic Data Collection System.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Inventory	Inventory Putaway	INVENTORY_PUTAWAY	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Receiving and Putting Away Stock," Entering Stockroom Feedback Using an Electronic Data Collection System.
PeopleSoft Inventory	Inventory Reservation	INVENTORY_RESERVATION	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Utilizing the Fulfillment Engine," Setting up the Fulfillment Engine EIPs.
PeopleSoft Inventory	Inventory Shipping	INVENTORY_SHIPPING	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Utilizing the Fulfillment Engine," Setting up the Fulfillment Engine EIPs.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Inventory	Inventory Shipping Container	INVENTORY_SHIP_CNTR	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Packing Orders for Shipment," Working with Shipping Containers and Shipping Serial IDs Using an Electronic Data Collection System.
PeopleSoft Inventory	Inventory Shipping Serial ID	INVENTORY_SHIP_SERIAL	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Packing Orders for Shipment," Working with Shipping Containers and Shipping Serial IDs Using an Electronic Data Collection System.
PeopleSoft Inventory	Inventory Transfer	INVENTORY_TRANSFER	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Making Stock Quantity Adjustments and Transfers Within the Business Unit," Transferring Materials Using the Inventory Transfers EIP.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Inventory	Item Balances	StockLevels	Inbound	Sync	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Inquiring and Reporting About On-Hand Stock," Providing Inventory Balances to Third-Party Systems.
PeopleSoft Inventory	Item Master	ITEM_CRM_FULLSYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Loading Items".
PeopleSoft Inventory	Item Master	ITEM_CRM_SYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Loading Items".
PeopleSoft Inventory	Item Master	ITEM_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Loading Items," Understanding Item Price List and Item Master Enterprise Integration Points.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Inventory	Item Master	ITEM_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Loading Items," Understanding Item Price List and Item Master Enterprise Integration Points.
PeopleSoft Inventory	Item Master	ITEM_FULLSYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Loading Items," Understanding Item Price List and Item Master Enterprise Integration Points.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Inventory and PeopleSoft Manufacturing	Item Master	ITEM_SYNC	Inbound	Async	See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Loading Items," Understanding Item Price List and Item Master Enterprise Integration Points. See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Integrating Oracle's PeopleSoft Manufacturing with Product Life Cycle Management Applications Using PDX 1.0 XML".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Inventory and PeopleSoft Manufacturing	Item Master	ITEM_SYNC PDX_MSG **Note.** PDX_MSG allows inbound integration using Agile PDX format	Outbound	Async	See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Loading Items," Understanding Item Price List and Item Master Enterprise Integration Points. See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Loading Items". See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Integrating Oracle's PeopleSoft Manufacturing with Product Life Cycle Management Applications Using PDX 1.0 XML".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Inventory	Item Master	ITEM_SYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Loading Items," Understanding Item Price List and Item Master Enterprise Integration Points. See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Loading Items".
PeopleSoft Inventory and PeopleSoft Purchasing	Item Price List	ITEM_PRICELIST_LOAD	Inbound	Async	See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Loading Items," Understanding Item Price List and Item Master Enterprise Integration Points.
PeopleSoft Inventory	Par Location	PAR_LOCATION_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Managing Par Inventory," Counting Par Location Inventory.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Inventory	Par Location	PAR_LOCATION_SYNC	Outbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Managing Par Inventory," Counting Par Location Inventory.
PeopleSoft Inventory	Par Location Count	PAR_LOCATION_COUNT	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Managing Par Inventory," Uploading Count Results Using the Par Location Count EIP.
PeopleSoft Inventory	Physical Inventory	PHYSICAL_INVENTORY	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Counting Inventory Stock," Collecting Counting Data using the Physical Inventory EIP.
PeopleSoft Inventory	Product Availability	ProdAvailability	Sync	Inbound	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Inquiring and Reporting About On-Hand Stock," Providing Item Availability Checks to Third-Party Systems.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Inventory	Product Availability Inquiry	PRODUCT_AVAILABILITY PRODUCT_AVAILABILITY	Outbound	Sync	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Inquiring and Reporting About On-Hand Stock," Providing Item Availability Checks to Third-Party Systems.
PeopleSoft Inventory	Returned Material Authorization	RMA_LOAD	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Receiving and Putting Away Stock," Staging Interunit Transfer and RMA Receipts.
PeopleSoft Inventory	Shipping Order Release	SHIPPING_ORDER_RELEASE	Outbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Picking Inventory," Creating Shipping Order Release EIPs.
PeopleSoft Inventory	Shipping Notification	SHIPPING_NOTIFICATION	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Understanding Order Fulfillment Processing," EIPs for Fulfillment Transactions.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Inventory	Transportation Notification	TMS_LOAD_NOTIFICATION	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Understanding Order Fulfillment Processing," Transportation Management System EIPs.
PeopleSoft Inventory	Transportation Notification	TMS_LOAD_NOTIFICATION TMS_LOAD_NOTIFICATION_RESP	Inbound	Sync	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Understanding Order Fulfillment Processing," Transportation Management System EIPs.
PeopleSoft Inventory	Transportation Order	TMS_ORDER_RELEASE	Outbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Understanding Order Fulfillment Processing," Transportation Management System EIPs.
PeopleSoft Inventory	VMI Expected Receipts	VMI_EXPECTED_RECEIPT	Outbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Using Vendor Managed Inventory," Creating and Using VMI Enterprise Integration Points.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Inventory	VMI Interunit Receipt	VMI_INTERUNIT_RECEIPT	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Using Vendor Managed Inventory," Creating and Using VMI Enterprise Integration Points.
PeopleSoft Inventory	VMI Inventory Adjustment	VMI_INVENTORY_ADJUSTMENT	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Using Vendor Managed Inventory," Creating and Using VMI Enterprise Integration Points.
PeopleSoft Inventory	VMI Quantity on Hand	VMI_QUANTITY_ON_HAND	Inbound	Async	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Using Vendor Managed Inventory," Creating and Using VMI Enterprise Integration Points.
PeopleSoft Manufacturing	Actual Hours	PRODUCTION_ACTUAL_HOURS	Inbound	Async	See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Completing Operations and Recording Scrap," Recording and Viewing Actual Machine and Labor Hours.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Manufacturing	Bill of Material	BOM_SYNC	Inbound	Async	See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Understanding PeopleSoft Bills of Material and Routings," Importing Bills of Material from External Sources. See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Integrating Oracle's PeopleSoft Manufacturing with Product Life Cycle Management Applications Using PDX 1.0 XML".
PeopleSoft Manufacturing	Production Completions	PRODUCTION_ORDER_COMPLETION	Inbound	Async	See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Recording Completions and Scrap Using Electronic Data Collection," Processing Electronic Data Collection Completions Transactions.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Manufacturing	Production Order Issue	PRODUCTION_ORDER_ISSUE	Inbound	Async	See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Recording Completions and Scrap Using Electronic Data Collection".
PeopleSoft Manufacturing	Production Order Update	PRODUCTION_ORDER_UPDATE	Outbound	Async	See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Maintaining Production Orders and Production Schedules".
PeopleSoft Manufacturing	Production Picking	PRODUCTION_PICKING	Inbound	Async	See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Issuing Material to Production," Processing Picking Plans Using Electronic Data Collection.
PeopleSoft Manufacturing	Production Serial Association	PRODUCTION_SERIAL_ASSOCIATION	Inbound	Async	See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Using Serial Genealogy in PeopleSoft Manufacturing".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	Carrier/Shipping Method	CARRIER_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Establishing Carriers.
PeopleSoft Order Management	Carrier/Shipping Method	CARRIER_FULLSYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Establishing Carriers.
PeopleSoft Order Management	Carrier/Shipping Method	CARRIER_SYNC	Inbound	Async	See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Establishing Carriers.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	Carrier/Shipping Method	CARRIER_SYNC	Outbound	Async	See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Establishing Carriers.
PeopleSoft Order Management	Carrier/Shipping Method	CARRIER_SYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Establishing Carriers.
PeopleSoft Order Management	Contact	CONTACT_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining Contacts," Setting Up Contacts.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	Contact	CONTACT_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining Contacts," Setting Up Contacts.
PeopleSoft Order Management	Contact	CONTACT_FULLSYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining Contacts," Setting Up Contacts.
PeopleSoft Order Management	Contact	CONTACT_SYNC	Inbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining Contacts," Setting Up Contacts.
PeopleSoft Order Management	Contact	CONTACT_SYNC	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining Contacts," Setting Up Contacts.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	Contact	CONTACT_SYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining Contacts," Setting Up Contacts.
PeopleSoft Order Management	Contact	CONTACT_SYNC_REQ CONTACT_SYNC_REQ_CALLBACK	Inbound	Async Req/Rsp	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining Contacts," Setting Up Contacts.
PeopleSoft Order Management	Customer	CUSTOMER_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	Customer	CUSTOMER_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.
PeopleSoft Order Management	Customer	CUSTOMER_FULLSYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.
PeopleSoft Order Management	Customer	CUSTOMER_SYNC	Inbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	Customer	CUSTOMER_SYNC	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.
PeopleSoft Order Management	Customer	CUSTOMER_SYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.
PeopleSoft Order Management	Customer	CUSTOMER_SYNC_REQ CUSTOMER_SYNC_REQ_CALLBACK	Inbound	Async Req/Rsp	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	Customer Group	CUSTOMER_GROUP_FULL_SYNC	Inbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.
PeopleSoft Order Management	Customer Group	CUSTOMER_GROUP_FULL_SYNC	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.
PeopleSoft Order Management	Customer Group	CUSTOMER_GROUP_FULLSYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	Customer Group	CUSTOMER_GROUP_SYNC	Inbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.
PeopleSoft Order Management	Customer Group	CUSTOMER_GROUP_SYNC	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.
PeopleSoft Order Management	Customer Group	CUSTOMER_GROUP_SYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	Customer Group	CUSTOMER_GROUP_SYNC_REQ CUSTOMER_GROUP_SYNC_REQ_CALLBACK	Inbound	Async Req/Rsp	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.
PeopleSoft Order Management	Order Status	OrderTracking	Inbound	Sync	*PeopleSoft CRM Sales Force Automation PeopleBook*
PeopleSoft Order Management	Product	PRODUCT_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Understanding Product Load EIPs.
PeopleSoft Order Management	Product	PRODUCT_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Understanding Product Load EIPs.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	Product	PRODUCT_FULLSYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Understanding Product Load EIPs.
PeopleSoft Order Management	Product	PRODUCT_SYNC	Inbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Understanding Product Load EIPs.
PeopleSoft Order Management	Product	PRODUCT_SYNC	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Understanding Product Load EIPs.
PeopleSoft Order Management	Product	PRODUCT_SYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Understanding Product Load EIPs.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	Product Group	PRODUCT_GROUP_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Understanding Product Load EIPs.
PeopleSoft Order Management	Product Group	PRODUCT_GROUP_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Understanding Product Load EIPs.
PeopleSoft Order Management	Product Group	PRODUCT_GROUP_FULLSYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Understanding Product Load EIPs.
PeopleSoft Order Management	Product Group	PRODUCT_GROUP_SYNC	Inbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Understanding Product Load EIPs.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	Product Group	PRODUCT_GROUP_SYNC	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Understanding Product Load EIPs.
PeopleSoft Order Management	Product Group	PRODUCT_GROUP_SYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Understanding Product Load EIPs.
PeopleSoft Order Management	Product Price List/Catalog	PRODUCT_PRICELIST_SYNC	Outbound	Async	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".
PeopleSoft Order Management	Sales Order	SALES_ORDER_LOAD	Inbound	Async	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	Sales Order/Quote Status	SALES_ORDER_STATUS	Outbound	Async	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".
PeopleSoft Order Management	Sales Order Acknowledgement	SALES_ORDER_ACKNOWLEDGEMENT	Outbound	Async	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".
PeopleSoft Order Management	Sales Order Change	SALES_CRM_ORDER_CHANGE_LOAD	Inbound	Async	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".
PeopleSoft Order Management	Sales Order Change	SALES_ORDER_CHANGE_LOAD	Inbound	Async	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	Sales Order Load	SALES_CRM_ORDER_LOAD	Inbound	Async	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".
PeopleSoft Order Management	Sales Order Notice	SALES_ORDER_CHANGE_NOTICE	Outbound	Async	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".
PeopleSoft Order Management	Sales Quote	SALES_QUOTE_LOAD	Inbound	Async	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".
PeopleSoft Order Management	Sales Quote Load	SALES_CRM_QUOTE_LOAD	Inbound	Async	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	Sales Quote Notice	SALES_QUOTE_NOTICE	Outbound	Async	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".
PeopleSoft Order Management	Standard Note	STD_NOTE_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining Additional Customer Information," Setting Up Standard Notes.
PeopleSoft Order Management	Standard Note	STD_NOTE_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining Additional Customer Information," Setting Up Standard Notes.
PeopleSoft Order Management	Standard Note	STD_NOTE_FULLSYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining Additional Customer Information," Setting Up Standard Notes.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	Standard Note	STD_NOTE_SYNC	Inbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining Additional Customer Information," Setting Up Standard Notes.
PeopleSoft Order Management	Standard Note	STD_NOTE_SYNC	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining Additional Customer Information," Setting Up Standard Notes.
PeopleSoft Order Management	Standard Note	STD_NOTE_SYNC_EFF	Outbound	Async	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining Additional Customer Information," Setting Up Standard Notes.
PeopleSoft Order Management	X.12 EDI Sales Order	EDI_TXN_850	Inbound	Async	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Order Management	X.12 EDI Sales Order Acknowledgement	EDI_TXN_855	Outbound	Async	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".
PeopleSoft Order Management	X.12 EDI Sales Quote	EDI_TXN_840	Inbound	Async	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".
PeopleSoft Order Management	X.12 EDI Sales Quote Acknowledgement	EDI_TXN_845	Outbound	Async	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_CONSTANT_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_CONSTANT_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_CONSTRAINT_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_CONSTRAINT_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_EXPRESSION_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_EXPRESSION_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_GLOBAL_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_GLOBAL_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_INTRN_VAR_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_INTRN_VAR_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_MATRIX_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_MATRIX_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_MESSAGE_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_MESSAGE_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_MULTOP_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_MULTOP_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_OPTION_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_OPTION_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_PRINTCD_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_PRINTCD_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_RULE_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".

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PeopleSoft Product Configurator	Product Configurator Data Sync	CP_RULE_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_SECONDARY_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_SECONDARY_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_TEMPLATE_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_TEMPLATE_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_TREE_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_TREE_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_VALUE_LIST_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Product Configurator	Product Configurator Data Sync	CP_VALUE_LIST_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".
PeopleSoft Purchasing	Advanced Shipping Receipt	ADVANCED_SHIPPING_RECEIPT	Inbound	Async	See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Receiving Shipments".
PeopleSoft Purchasing	GPO Item Load	ITEM_MFG_GPO_LOAD	Inbound	Async	See *PeopleSoft Enterprise Source to Settle Common Information 9.0 PeopleBook*, "Using Group Purchasing Organizations," Loading GPO Contracts.
PeopleSoft Purchasing	Procurement Cards	PROCUREMENT_CARD_LOAD	Inbound	Async	See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Managing Procurement Cards".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Purchasing	Purchase Order Acknowledgement, PO Change Acknowledgement	PURCHASE_ORDER_ACKNOWLEDGEMENT	Inbound	Async	See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Creating Purchase Order Change Orders".
PeopleSoft Purchasing	Purchase Order Dispatch	PURCHASE_ORDER_DISPATCH	Outbound	Async	See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Dispatching and Printing Purchase Orders".
PeopleSoft Purchasing	Purchase Order Expected Receipt	PO_EXPECTED_RECEIPT_BUS_UNIT	Outbound	Async	See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Receiving Shipments".
PeopleSoft Purchasing	Purchase Order Expected Receipt	PO_EXPECTED_RECEIPT_SHIPTO	Outbound	Async	See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Receiving Shipments".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Purchasing	Purchase Order Receipt	PO_RECEIPT_NOTIFICATION	Outbound	Aysnc	See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Receiving Shipments". See Chapter 7, "Integrating With a Third-Party Point-of-Use Supplier System," page 211.
PeopleSoft Purchasing	Purchase Order Receipt	PURCHASE_ORDER_RECEIPT	Inbound	Async	See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Receiving Shipments".
PeopleSoft Purchasing	Purchase Order Requisition	PURCHASE_REQUISITION_LOAD	Inbound	Async	See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Using the Requisition Loader". See Chapter 7, "Integrating With a Third-Party Point-of-Use Supplier System," page 211. See Chapter 8, "Integrating With a Third-Party Surgical Resource Software Application," page 219.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Purchasing	Purchase Order Requisition	PURCHASE_REQUISITION_LOAD_CRM	Inbound	Async	See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Using the Requisition Loader".
PeopleSoft Purchasing	Request for Quote	PO_REQUEST_FOR_QUOTE	Outbound	Async	See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Managing Requests for Quotes".
PeopleSoft Purchasing	Request for Quote	PO_REQUEST_FOR_QUOTE_RESPONSE	Inbound	Async	See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Managing Requests for Quotes".
PeopleSoft Purchasing	Return to Vendor	RETURN_TO_VENDOR	Outbound	Async	See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Managing Vendor Returns".
PeopleSoft Quality	Quality Data Submit	QUALITY_DATA_SUBMIT	Inbound	Async	See *PeopleSoft Enterprise Quality 9.0 PeopleBook*, "Integrating With Third-Party Applications".

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Services Procurement	Establishment and Location Full Sync (SCM to HCM)	ESTAB_LOC_US_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.
PeopleSoft Services Procurement	Establishment and Location Full Sync (HCM to SCM)	ESTAB_LOC_US_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.
PeopleSoft Services Procurement	US Establishment and Location Sync Message (SCM to HCM)	ESTAB_LOC_US_SYNC	Inbound	Async	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Services Procurement	US Establishment and Location Sync Message (HCM to SCM)	ESTAB_LOC_US_SYNC	Outbound	Async	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.
PeopleSoft Services Procurement	Establishment FullSync Message (SCM to HCM)	ESTAB_TBL_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.
PeopleSoft Services Procurement	Establishment FullSync Message (HCM to SCM)	ESTAB_TBL_FULLSYNC	Outbound	Async	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Services Procurement	Establishment Table Sync Message (SCM to HCM)	ESTAB_TBL_SYNC	Inbound	Async	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.
PeopleSoft Services Procurement	Establishment Table Sync Message (HCM to SCM)	ESTAB_TBL_SYNC	Outbound	Async	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.
PeopleSoft Services Procurement	Add Job (from HCM to SCM)	HCR_ADD_JOB	Outbound	Async	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Services Procurement	Add Job (from SCM to HCM)	HCR_ADD_JOB_ACK	Inbound	Async	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.
PeopleSoft Services Procurement	Add Person (from SCM to HCM)	HCR_ADD_PERSON	Outbound	Async	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.
PeopleSoft Services Procurement	Add Job (from HCM to SCM)	HCR_ADD_PERSON_ACK	Inbound	Async	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Services Procurement	Add Job Canceled (from HCM to SCM)	HCR_CAN_JOB	Outbound	Async	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.
PeopleSoft Services Procurement	Labor Agreement Full Sync Message	HR_LABOR_AGRMNT_FULLSYNC	Inbound	Async	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.
PeopleSoft Services Procurement	Labor Agreement (from HCM to SCM)	HR_LABOR_AGRMNT_SYNC	Inbound	Async	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Services Procurement	Candidate Req	SAC_CANDIDATE_REQ SAC_CANDIDATE_RESP	Outbound	Sync	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.
PeopleSoft Services Procurement	Job Posting	SAC_JOB_POST SAC_JOB_RESP	Inbound	Sync	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.
PeopleSoft Services Procurement	Job Unposted	SAC_JOB_UNPOST SAC_JOB_RESP	Inbound	Sync	See *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook*, "HCM Integrations," Setting Up the PeopleSoft HCM and Services Procurement Person Integration.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Supplier Contract Management	Contract Activity Update	CS_ACTIVITY_CNTRCT	Inbound	Async	See *PeopleSoft Enterprise Supplier Contract Management 9.0 PeopleBook*, "Syndicating Supplier Contracts and Contract Messaging," Contract Syndication Enterprise Integration Points.
PeopleSoft Supplier Contract Management	Contract Activity Update	CS_ACTIVITY_CNTRCT	Outbound	Async	See *PeopleSoft Enterprise Supplier Contract Management 9.0 PeopleBook*, "Syndicating Supplier Contracts and Contract Messaging," Contract Syndication Enterprise Integration Points.
PeopleSoft Supplier Contract Management	Contract Syndication	CS_PROCUREMENT_CNTRCT	Inbound	Async	See *PeopleSoft Enterprise Supplier Contract Management 9.0 PeopleBook*, "Syndicating Supplier Contracts and Contract Messaging," Contract Syndication Enterprise Integration Points.

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PeopleSoft SCM Product	EIP	Object Name	Path	Type	Reference
PeopleSoft Supplier Contract Management	Contract Syndication	CS_PROCUREMENT_CNTRCT	Outbound	Async	See *PeopleSoft Enterprise Supplier Contract Management 9.0 PeopleBook*, "Syndicating Supplier Contracts and Contract Messaging," Contract Syndication Enterprise Integration Points.
Common	EWN Notify Message	SAC_EWN_NOTIFY_MSG	Outbound	Async	See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Setting Up and Using the Message Dashboard," Receiving Notifications Using XML Messages.

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See Also

http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

Enterprise PeopleTools 8.48 PeopleBook: PeopleCode API Reference

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CHAPTER 3

Implementing Integrations

This chapter discusses implementing integrations.

- Setting up service operations
- Setting up chunking
- Setting up electronic data collections
- Setting up BackBone Interlinks
- Setting up XML Mapper

Setting Up Service Operations

PeopleSoft is delivered with many enterprise integration points (EIPs) to send and receive data with a third-party system or another PeopleSoft application, such as CRM. These EIPs are implemented using service operations within PeopleSoft Integration Broker. The instructions in this section describe the steps necessary to enable service operations.

Note. Your database administrator will need to assist you with this setup.

Understanding Inbound EIPs

PeopleSoft Integration Broker can receive data from a third-party system or another PeopleSoft system, such as CRM. The inbound data can have the following data formats:

- An XML file that uses the PeopleSoft format.

  This XML file could be generated by another PeopleSoft system, generated by a third-party system in this PeopleSoft XML format, or generated by a third-party system and then converted to the PeopleSoft XML format by a middleware product. Once received by your PeopleSoft system, the inbound data is placed in the message queue, checked for errors and then moved to the inbound staging tables to be processed by the individual PeopleSoft application.

- A flat file that uses the PeopleSoft format.

  This file could be generated by a third-party system in this PeopleSoft format or generated by a third-party system and then converted to the PeopleSoft format by a middleware product. A flat file could also come from another PeopleSoft system. The PeopleSoft Integration Broker uses transforms to convert the data from a flat file to an XML file also using the PeopleSoft format. The inbound data is then placed in the message queue, checked for errors, and then moved to the inbound staging tables to be processed by the individual PeopleSoft application.

- A flat file using an EDI X.12 format.

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This file could be generated by a third-party system in this EDI X.12 flat file format or generated by a third-party system and then converted to the EDI X.12 flat file format by a middleware product. An EDI flat file could also come from another PeopleSoft system. Once received by your PeopleSoft system, the PeopleSoft Integration Broker uses transforms to convert the data from a flat file to an XML file and then from EDI X.12 format to the PeopleSoft format. The inbound PeopleSoft-formatted XML data is then placed in the message queue, checked for errors, and then moved to the inbound staging tables to be processed by the individual PeopleSoft application.

- An XML file using an EDI X.12 format.

  This file could be generated by a third-party system in this EDI X.12 XML format or generated by a third-party system and then converted to the EDI X.12 XML format by a middleware product. An EDI XML file could also come from another PeopleSoft system. Once received by your PeopleSoft system, the PeopleSoft Integration Broker uses transforms to convert the data from EDI X.12 format to the PeopleSoft format. The inbound PeopleSoft-formatted XML data is then placed in the message queue, checked for errors, and then moved to the inbound staging tables to be processed by the individual PeopleSoft application.

Note. Standard X.12 transaction definitions are predefined in PeopleSoft along with examples of transformation rules for selected X.12 transactions. Individual trading partner specifications will vary so customizations are required for each transaction or trading partner variation.

Understanding Outbound EIPs

PeopleSoft Integration Broker can send data to a third-party system or another PeopleSoft system, such as CRM using the following data formats:

- An XML file that uses the PeopleSoft format.

  PeopleSoft can generate a PeopleSoft-formatted XML file to be received by another PeopleSoft system, such as CRM, or a third-party system with or without conversion by a middleware product.

- A flat file that uses the PeopleSoft format.

  PeopleSoft can generate a PeopleSoft-formatted XML file that is converted, by PeopleSoft Integration Broker, into a PeopleSoft-formatted flat file. This flat file can be received by a third-party system or processed by a middleware product and then received by a third-party system.

- A flat file using an EDI X.12 format.

  PeopleSoft can generate a PeopleSoft-formatted XML file that is converted, by PeopleSoft Integration Broker, using two transforms (Application Engine programs). The data is first converted into the EDI X.12 format and then from XML to flat file format.

- An XML file using an EDI X.12 format.

  You do not have to use a flat file for EDI formatted data. As delivered, the PeopleSoft Integration Broker converts the PeopleSoft-formatted XML data into a EDI X.12 formatted flat file using transform programs; first by converting to an EDI XML format and then to a flat file format. However, you can change the system to output EDI X.12 data in an XML format by removing the second transform program.

Note. Standard X.12 transaction definitions are predefined in PeopleSoft along with examples of transformation rules for selected X.12 transactions. Individual trading partner specifications will vary so customizations are required for each transaction or trading partner variation.

Setup Within PeopleSoft Integration Broker

To activate a service operation, complete the following steps in PeopleSoft Integration Broker:

1. Activate the service operation.

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On the General tab of the Service Operations component, select the Active check box for the applicable service operation version. If the desired version is not the default version for the service operation, the default version must also be activated.

2. For asynchronous service operations only, verify the queue is running.

   On the General tab of the Service Operations component, select the View Queue link at the bottom of the page. On the Queue Definitions page, verify the Queue Status field has a value of *Run.*

3. Activate the service operation handlers.

   Note. This step does not apply to all service operations.

   On the Handlers tab of the Service Operations component, select the value of *Active* in the Status field for all needed handlers.

   - For inbound asynchronous service operations, activate the OnNotify handler.
   - For inbound synchronous service operations, activate the OnRequest handler.
   - If you are using chunking on an outbound service operation, activate the OnRoute handler.

4. Activate the service operation routings.

   On the Routings tab of the Service Operations component, activate a routing definition for each node that will send or receive data. To activate a routing, select the check box next to the routing definition and click the Activate Selected Routings button.

   - Activate an inbound routing to receive data into PeopleSoft SCM.
   - Activate an outbound routing for sending data to a third-party system or another PeopleSoft product, such as CRM.
   - Activate a local routing for sending data using an effective-dated outbound service operation.
   - Activate a local routing to receive inbound flat files.
   - You must activate at least one routing if the data is being sent in an XML format.
   - You can skip this step if a batch publish rule is set up to post to a flat file only.

5. Verify the routing definition parameters.

   On the Routings tab of the Service Operations component, select the link attached to the routing definition name. This link accesses the Routing Definitions component. Select the Parameters tab and complete the following steps:

   - Confirm the external alias name in the External Alias field for the routing is correct. When sending or receiving data, the Integration Broker determines which routing to use by referring to the external alias name, not the routing name.
   - Add or verify the transform programs on this routing definition. A routing definition defines the sending and receiving nodes for a transaction and specifies any inbound and outbound transformations to invoke. A transform program is a type of PeopleSoft Application Engine program that can convert data from one format to another; for example, from XML to a flat file. Use a transform program when one node sends a request or response message with a data structure different from the structure required by the other node. Many pre-defined routings are delivered with transform programs. You must decide, based on your unique situation, to change, remove, and add transform programs. For example, some delivered transform programs convert data to the EDI format, if you are not using EDI then you will want to use a different routing definition or remove that transform program from the routing definition.

6. Verify the node from the routing is active.

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Go to the Node Definitions page and verify the Active Node check box has been selected for any sender or receiver nodes used in the routings that you activated on your Service Operations-Routings page.

7. For an outbound service operation, verify the node or routing is connected to the correct network.
8. For inbound service operations using a flat file, define the inbound file rule and run control parameters:
   - For X.12 formatted EDI files, use the Inbound File Loader Rules page and the Inbound File Processing run control under the Integration Broker menu.
   - For PeopleSoft formatted files, use the File Inbound page and the Inbound File run control under the Enterprise Components menu.

Setup Within PeopleSoft Enterprise Components

To activate chunking, inbound file rules, batch publish rules, or full publish rules for a service operation, complete the following steps in PeopleSoft Enterprise Components:

- Setup the publish utility.

  If the outbound EIP is sending (publishing) data using the publish utility, setup full or batch data publishing.

  The full publish utility automates the process of copying the contents of an entire table into another database or third-party system. You can use the utility to synchronize data between systems. The publishing rules include pages for full table publishing rules, batch publishing rules, record mapping, languages, and batch programs.

  Setup for full or batch data publishing using the Full Data Publish Rules component or the Batch Publish Rules component. On both of these components, the Message Name field is the service operation. Complete the following tasks:

  1. Activate the rule by selecting the value of *Active* for the Status field.
  2. Specify the desired output (XML-based message or flat file).
  3. If you want to use chunking select a Chunking Rule ID. The outbound data will be sent to the nodes specified by the chunking rule.

  If you have more than one publish rule defined for a service operation, you should activate a rule for each batch program. For example, item status change, Item Revisions, and Item Loader each have unique rules for the ITEM_SYNC service operation, so three rules must be activated for ITEM_SYNC.

- For outbound asynchronous service operations using chunking, activate and configure the appropriate chunk rule mapping definitions. For instance, use the BusUnit Mapping component (EO_CHUNKBU) to configure the BUSINESS_UNIT chunk rule.

  See Chapter 3, “Implementing Integrations,” Setting Up Chunking, page 88.

- Setup the inbound file rules in order to used the inbound file publish utility.

  When external systems send flat files, use the inbound file publish utility to translate the incoming data into transactions that are acceptable to your PeopleSoft system. Use the Inbound File Rules page to define the file, file layout, service operation, and other parameters to accept the inbound file.

See Also

Chapter 3, “Implementing Integrations,” Setting Up Chunking, page 88

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Pages Used to Set Up Service Operations

Page Name	Object Name	Navigation	Usage
Service Operations-General	IB_SERVICE	PeopleTools, Integration Broker, Integration Setup, Service Operations, General	Define and activate a service operation.
Service Operations-Handlers	IB_SERVICEHDLR	PeopleTools, Integration Broker, Integration Setup, Service Operations, Handlers	Activate one or more service operation handlers.
Service Operations-Routings	IB_SERVICERTNGS	PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings	Define and activate routing definitions on the service operation.
Queue Definitions	IB_QUEUEDEFN	• PeopleTools, Integration Broker, Integration Setup, Service Operations, General. Select the Queue link attached to this service operation. • PeopleTools, Integration Broker, Integration Setup, Queues	Activate the queue used by the service operation.
Routings-Parameters	IB_ROUTINGDEFNDOC	• PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings. Select the Details link attached to the routing. • PeopleTools, Integration Broker, Integration Setup, Routings, Parameters	Verify the external service alias names used by this routing.
Node Definitions	IB_NODE	PeopleTools, Integration Broker, Integration Setup, Nodes, Node Definitions	Activate node used by the service operation.
Nodes-Connectors	IB_NODECONN	PeopleTools, Integration Broker, Integration Setup, Nodes, Connectors	For an outbound service operation, verify the node is connected to the correct network.
Full Data Publish Rules	EO_MSGPUBFULL	Enterprise Components, Integration Definitions, Full Data Publish Rules	Activate the full data publish rule for the service operations using the full data publish rules.
Batch Publish Rules	EO_MSGPUBATCH	Enterprise Components, Integration Definitions, Batch Publish Rules	Activate the batch publish rule for the service operations using the batch publish utility.
File Inbound	EO_FILE_INBOUND	Enterprise Components, Integration Definitions, Inbound File Rule	Define the parameters to receive inbound flat files from third-party systems.

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See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

Setting Up Chunking

If you are sending outbound data using a service operation in Integration Broker, you may want to set up chunking. When chunking, the system automatically breaks up the outbound transaction into several smaller transactions based on the values in one or more of the fields in the level zero record of the message. The message identifies the records and fields to be sent and is tied to the service operation. For example, if you want to chunk by the business unit field of the message, the outbound transaction would be broken up by business unit sending each business unit's outbound data to a node that you have defined. Another example would be for sites sending EDI transactions directly to trading partners. If you are sending purchase orders directly to a vendor, make sure that the vendor gets only their information. Chunking provides the ability to split a batch of purchase orders into separate transactions based on the trading partner. The Integration Broker then provides tools to route the transactions to specific nodes based on that trading partner identification, in this case the vendor ID.

See *PeopleSoft Enterprise Electronic Data Interchange 9.0 PeopleBook*, "Understanding Electronic Data Interchange".

Note. If you are using a middleware product to transform and route transactions to trading partners then you most likely will not need to use chunking. The entire outbound transaction would go to the node defined for the middleware product.

Chunking is implemented using the Batch Publish Utility or the Full Data Publish Utility. In either case a batch publish rule is created and a *chunking rule* can be attached. The chunking rule defines a table containing a set of values that map to specific nodes. For example, in the above example where you are chunking by vendor ID, the chunking rule table would contain a set of vendor IDs that map to individual nodes for trading partners receiving the purchase order data.

The following is a step by step explanation of the process flow of an outbound transaction using chunking:

1. Chunking Selection

   The run process that generated the transaction. This may be the Full Data Publish Utility or one of the batch based service operations that use the Batch Publish Utility.

   Note. All transactions generated from the Publish Outbound Messages process page use the Batch Publish Utility.

   When the batch publish or full data publish utilities run they recognize the chunking rule assigned to the publish rule and split the data into separate XML files for each chunking rule value. The XML files are then published to the Integration Broker.

2. Chunking Node Routing

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The Integration Broker makes the decision of which node will receive each XML file. Standard processing for the Integration Broker will send the outbound data to all of the nodes that have active outbound routings on the service operation. When chunking is used, the Integration Broker needs to send the outbound transaction only to the nodes specified by the chunk rule. This is done by activating the ROUTERSENDHDLR handler on the Service Operations-Handlers page. This handler is an OnRoute application class containing PeopleCode that directs the Integration Broker to only send the outbound data to the nodes that you have defined for the specific chunking rule.

PeopleSoft provides a number of chunking rules, chunking rule tables, and data entry pages that can be used to maintain node mappings and routing rules for some of the more commonly used field values. The data entry pages are noted in the Pages Used to Set up Chunking table below. Additional setup information is provided in the PeopleSoft Enterprise Components PeopleBook explaining how to create your own customized chunking rule, chunking rule table and data entry pages.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

Pages Used to Set Up Chunking

Page Name	Object Name	Navigation	Usage
Add Nodes to Chunk Rule	EO_ADNODECHUNK_PNL	Enterprise Components, Integration Definition, Map Chunking Rules, Node to ChunkRule, Add Nodes to Chunk Rule	Map nodes by Chunk Rules.
BusUnit Mapping	EO_CHUNKBU	Enterprise Components, Integration Definition, Map Chunking Rules, Business Units, BusUnit Mapping	Maintain ChunkRule business unit mapping.
Quick Map	EO_ADDBUNODE_PNL	Enterprise Components, Integration Definition, Map Chunking Rules, BU to ChunkRule/Node, Quick Map	Map business units by ChunkRules or nodes.
Map Business Unit	EO_ADDNODEBU_PNL	Enterprise Components, Integration Definition, Map Chunking Rules, ChunkRule/Node to BU, Map Business Unit	Map ChunkRules or nodes by business unit.
SetId Mapping	EO_CHUNKSETID	Enterprise Components, Integration Definition, Map Chunking Rules, Setids, Setid Mapping	Maintain ChunkRule setID mapping.
Quick Map	EO_ADDSIDNODE_PNL	Enterprise Components, Integration Definition, Map Chunking Rules, Setid to ChunkRule/Node, Quick Map	Map setIDs by ChunkRules or nodes.

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Page Name	Object Name	Navigation	Usage
Map Set IDs	EO_ADDNODESID_PNL	Enterprise Components, Integration Definition, Map Chunking Rules, ChunkRule/Node to Setid, Map Set IDs	Map ChunkRules by setID.
Customer ID Chunk	OM_CHUNKCUSTID	SCM Integrations, Chunking Rule, CustID to Node Mapping, Customer ID Chunk	Map customer chunk rule and node to customer ID.
BU/Location Node Mapping	IN_CHUNKBULOCATION	SCM Integrations, Chunking Rule, BU/Loc to Node Mapping, BU/Location Node Mapping	Map business units chunk rule and node to location codes.
BU/Par Location Node Mapping	IN_CHUNKBUPARLOC	SCM Integrations, Chunking Rule, BU/Par to Node Mapping, BU/Par Location Node Mapping	Map business unit and par location chunk rule and node to par location ID.
Setup Vendor to Node	PO_CHUNK_VENDOR	SCM Integrations, Chunking Rule, Manage ChunkRule VendorID Map, Setup Vendor to Node	Set up vendor chunk rule and node to vendor ID and vendor location.
PO Chunk Shipto	PO_CHUNK_SHIPTO	SCM Integrations, Chunking Rule, Ship to Loc to Node Mapping, PO Chunk Shipto	Set up ShipTo chunk rule and node to Ship To Location.
Source Code Chunk	OM_CHUNK_SRC_CD	SCM Integrations, Chunking Rule, Source Code to Node Mapping, Source Code Chunk	Set up source code chunk rule and node to source codes.

Setting Up Electronic Data Collections

This section discusses setting up electronic data collections.

Page Used to Set Up Electronic Data Collections

Page Name	Object Name	Navigation	Usage
Data Collection Setup	BCT_SETUP_FS	SCM Integrations, Setup, Data Collection, Data Collection Setup	Set up electronic data collection defaults.

Setting Up Electronic Data Collections Defaults

To enter defaults for inbound transactions, use the Bar Code Transaction Setup component.

Access the Data Collection Setup page.

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Transaction Number	The last transaction number used in the transaction log appears. The system uses the transaction number to automatically generate a unique number for each transaction added to the transaction log from the transaction pages. System-generated transactions also use this field.
History Options	Determines whether a history of the transactions is saved when you run the Purge process (INPYPURG) on the transactions in the transaction log. Options are: *History for all Transactions*: The system maintains a history of all transactions in the transaction log. *History only for Errors:* The system maintains a history only for transactions that have errors or warnings. *No history will be maintained:* The system doesn't maintain a history for any transactions in the transaction log.
Status of Records to Purge	Determines which records the system purges when you run the Purge process. Options are: *Complete*: All rows for the transaction are either canceled or successfully processed. *Confirmed:* Purges only rows set to a confirmed status. This entry should be selected only if you have modified the interacting system to set the status of transactions to confirmed after making sure that the PeopleSoft system has processed the transaction to a complete status.
File Suffix	Used as the suffix for the file name of the label extraction file, when a format ID is not specified on the label generation page.

Note. If your interacting system is selecting *Complete* transactions to mark them as being ready to purge, the BCT_STATUS on BCT_CTL should be updated from *2* (complete) to *6* (confirmed).

See Also

Chapter 10, "Using an Electronic Data Collection System," Using Electronic Data Collection Transactions, page 235

Chapter 10, "Using an Electronic Data Collection System," Purging Transactions, page 239

Chapter 10, "Using an Electronic Data Collection System," Generating Labels, page 239

Setting Up BackBone InterlinX

This section provides an overview and discusses BackBone InterlinX Framework.

Understanding BackBone InterlinX

BackBone InterlinX provide a metadata-driven, generic framework for data synchronization of tables between PeopleSoft databases. This framework enables PeopleSoft data synchronization through a single, metadata-driven EIP, thereby leaving standard EIPs to do their intended purpose of providing integration "services".

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The design concepts behind the BackBone InterlinX Framework provide:

- A single, generic, metadata-driven EIP for selecting and/or synchronizing data between PeopleSoft databases of varied releases.
- A private EIP that does not expose any additional unnecessary EIP contracts to the outside world.
- An internal EIP that is not intended for external use and not posted to the ISR for external-use or support.
- The ability to synchronize record level data independent of application business logic.
- The ability to leverage XSL transformations for data model changes between releases.

BackBone InterlinX provides a simple, metadata-driven, Integration Broker-based solution for data synchronization. In addition, BackBone InterlinX provides data query (“Data Pull”) capabilities using XML that are not offered with ETL tools.

Prerequisites

The following objects must be activated and configured correctly within the PeopleSoft Integration Broker for the BackBone InterlinX Framework to work:

- Service operation SAC_BBIX_MESSAGE.
- Message SAC_BBIX_MESSAGE.
- Queue SAC_BBIX.
- Service operation routings.
- Service operation handler INBOUND_SAC_BBIX

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Pages Used to Set Up Backbone InterlinX

Page Name	Object Name	Navigation	Usage
Define Target Set	SAC_BBIX_TARGETSET	SCM Integrations, Backbone InterlinX, Define Target Set	Set up target sets, a logical grouping of target databases for data to be synchronized with the Backbone InterlinX framework. You can enter a list of target databases or Integration Broker Nodes for data to be "pushed" to or "pulled" from in order to define your target sets.
Integration Definition	SAC_BBIX_DEFN	SCM Integrations, Backbone InterlinX, Define Integration	Set up integrations, a record or group of records that you wish to synchronize with other PeopleSoft databases within the BackBone InterlinX Framework. You can select the data options for integrating with your target databases.
BBIX User Exit Processing	SAC_BBIX_USER_EXIT	Click the Integration User Exits link on the Integration Definition page	Set up additional processing to be done before and/or after data is synchronized using the BackBone InterlinX Framework.

Setting Up Target Sets

Access the Define Target Sets page.

Target Set Enter an identifier for your target set.

Node Name Enter a PeopleSoft Integration Broker Node with which to synchronize data.

Note. Add additional rows for each Node that you wish to integrate with for this target set ID.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

Defining Integrations

Access the Integration Definition page.

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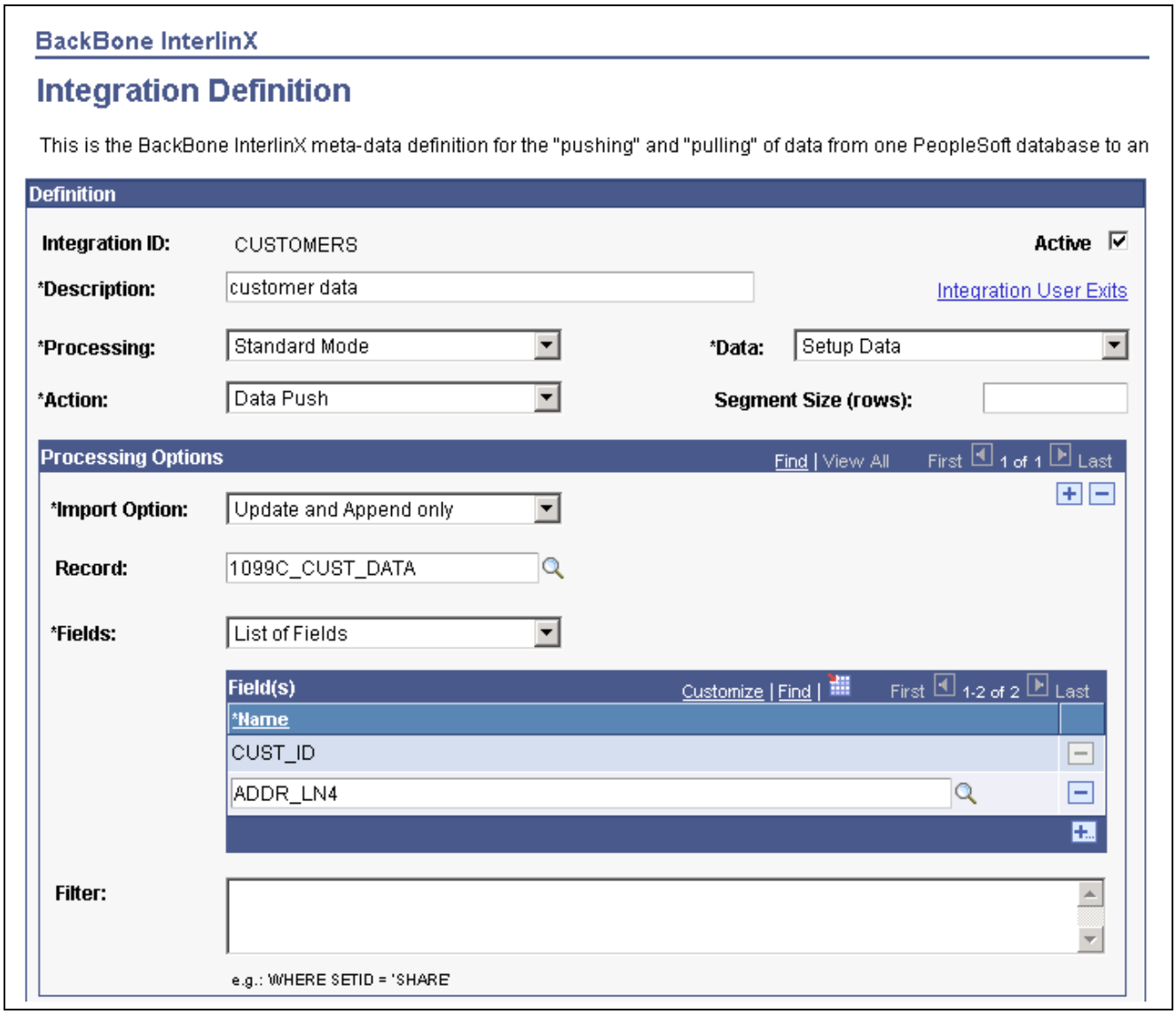
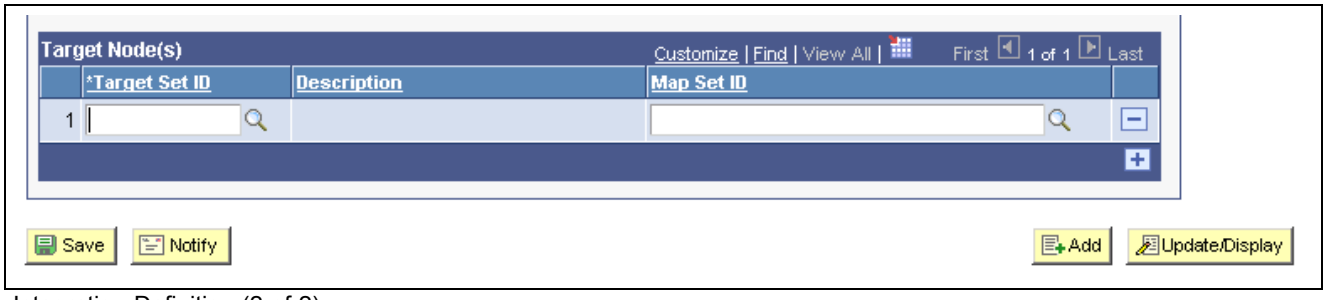


Integration Definition (1 of 2)



Integration Definition (2 of 2)

Integration ID Enter an ID for your integration.

Active Click to indicate that the integration is active. If cleared, the integration is inactive. Inactive integrations will not publish data.

Processing Determines how the integration will be processed. Options include:

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Standard Mode: Select to enables theProcessing Options group box so that you can execute the integration either from the BBIX Run Control Component or directly from PeopleCode.

PeopleCode Only Mode: Select to disables the Processing Options group box so that you can only execute the integration using PeopleCode.

Data Determines the type of data that the integration will synchronize. Options include:

Setup Data: Data is synchronized and committed record by record

Transaction Data: Data is synchronized and committed based on a parent-child transaction model. When this option is selected, the first record in the Processing Options group box is used as the parent record, and all additional records are used as child records.

The system synchronizes data one parent row and all of the corresponding children rows at a time. Each parent row and the children rows is considered a logical transaction.

This option is only available with the processing option of *Standard Mode*.

Action Select to determine whether data is sent to or retrieved from the target sets. Options include:

Data Push – Data is sent to the defined target set(s).

Data Pull – Data is retrieved from the defined target set(s).

This option is only available with the processing option of *Standard Mode.*

Processing Options

Import Option Select to determine whether date is deleted from tables before synchronization occurs. Options include:

Update and Append Only: Data is not deleted from the source or target database(s). The data sent is updated if the record already exists or added if the record does not exist in the target for a “Data Push” or in the source for a “Data Pull”.

Delete All Record Data: The system deletes date from the source or target database. ALL of the data in the table is deleted in the target for a “Data Push” or in the source for a “Data Pull” before the new data is inserted.

Delete Records using Filter: Data is deleted from the source or target database(s) based on the record “filter” that is defined. The data that matches the “filter” condition in the table is deleted in the target for a “Data Push” or in the source for a “Data Pull” before the new data is inserted.

This option is only available with the processing option of *Standard Mode* and Setup Data.

Record Select a table to synchronize.

Note. For transaction data, the key values on the parent record must exist in all child records.

This option is only available with the processing option of *Standard Mode*.

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Fields Select to determine whether to synchronize all fields on the record or a list of fields. Options include:

All Fields: All fields on the record are synchronized.

List of Fields: Enables a subset of the fields on the record to be synchronized. When selected, you can create rows and search for each field on the selected record. However, the key fields for a record are always synchronized.

Note. If fields are sent in a "Data Push" that do not exist in the target database(s), then these extra fields are ignored. However, if specific fields are selected within a "Data Pull" that do not exist in the target database(s), then data will not be synchronized.

Filter Create a filter or WHERE clause to subset the data to be synchronized. If not entered, then the entire record is used.

This field is not required.

Target Nodes

Target SetID Determines the Target Set with which to synchronize the integration. If you don't select at least one Target Set, then the integration will be sent based on the Integration Broker service operation defined for the SAC_BBIX_MESSAGE message.

Map Set ID Enter the map set ID for which you want to map the integration.

Implementing XML Mapper

This section provides an overview of XML Mapper and discusses how to set it up.

Understanding XML Mapper

XML Mapper enables you to map values between your database and an external trading partner database. For example, if you are integrating to a computer hardware vendor, if you use a field called business unit, and the vendor uses a field called BU, you can set up a mapping relationship where your outbound purchase order XML transaction automatically converts data in business unit fields to BU fields.

Prerequisites to Using XML Mapper

Before you being using XML Mapper, you must:

- Activate service operations set up in Integration Broker.
- Set up an integration broker relationship including transaction modifiers for the node associations.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

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Pages Used to Set Up XML Mapper

Page Name	Object Name	Navigation	Usage
Define Map	SAC_MAP_DEFN	SCM Integrations, XML Mapper, Define Maps	Use to define the type of transformation and to which message, records, and fields it applies.
Map Detail	SAC_MAP_DEFN_DTL	SCM Integrations, XML Mapper, Define Maps, Map Detail	Use to specify the map type detail.
Define Map Sets	SAC_MAPSETDEFN	SCM Integrations, XML Mapper, Define Map Sets	Use to group maps together, order them, and specify in which directions they apply.
Define Node Associations	SAC_NODE_ASSOC	SCM Integrations, XML Mapper, Define Node Associations	Use to associate a source node and a target node with a map set. All maps in an associated map set will then execute using the node association. Before defining a node association, set up an Integration Broker service operation routings for your nodes. See *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*

Defining Maps

Access the Define Maps page.

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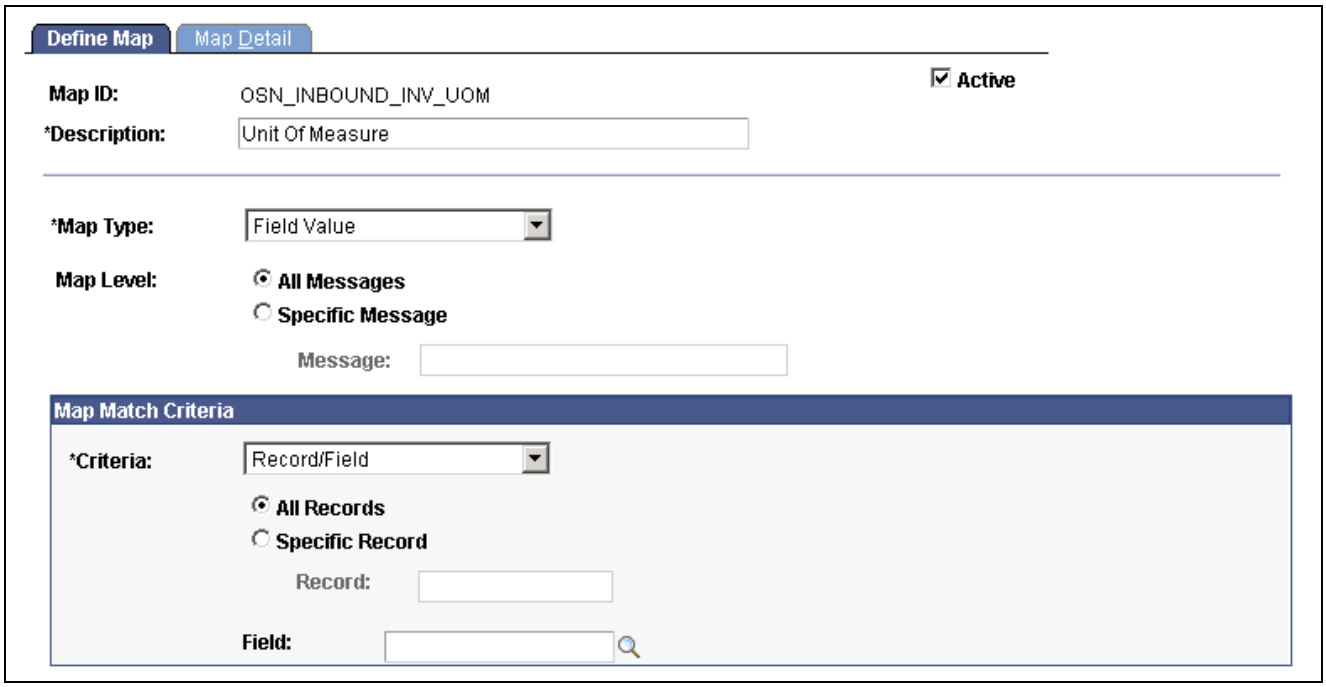

Define Maps

Map Type

Select to specify a map type for this map. The value you select determines the options available on the Map Detail page. Options include:

Application Class: maps data using an application class that you specify. Selecting this makes the application class ID and application class path fields available on the Map Detail page. Specify an extension of class SCM_SAC_XMLMAPPER:Maps:MapBase, and be certain the specified class implements method TransformXMLString().

Attribute Value: maps the values associated with a specific XML attribute. Selecting this makes the internal value and external value fields available on the Map Detail page.

Field Alias: enables the renaming of fields, such as renaming a field called *business unit* to *BU*. Selecting this makes the internal field name and external field name fields available on the Map Detail page.

Field Value: enables the revaluing of fields. For example, externally, a business unit could be called *NY Operations*, internally, it could be called *US007*. Selecting this makes the internal value and external value fields available on the Map Detail page.

Field Value — SQL: maps field values using a SQL object. The SQL objects should return two values: internal value and external value, in that order. Selecting this makes the SQL object identifier field available on the Map Detail page.

Record Alias: enables the renaming of records. Selecting this makes the internal record and external record fields available on the Map Detail page.

Values Only: sets up a simple list of mapped values that you can use from code. Selecting this makes the internal value and external value fields available on the Map Detail page.

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Note. This map type is never run automatically.

XSL: maps data using XSL that you provide. Selecting this makes the XSL field available on the Map Detail page.

See Chapter 3, "Implementing Integrations," Defining Map Set Detail, page 99.

Map Level Select All Messages to apply this map to all active messages, or Specific Message to apply this map to one message only.

This option is only available if you select a map type of application class, attribute value, field alias, field value, record alias, or XSL.

Message Enter the specific message to map to if you selected the specific message mapping level.

Map Match Criteria

Attribute Name Enter a name for the attribute. The system displays this field only when you have selected an attribute value map type.

Criteria Enter criteria used to map the data. This is only available if you have selected a field alias, field value, field value — SQL map type. Options include:

None: no criteria will be used to map the data other than that found on the Map Detail page.

Note. This value is for system use only. You must select a value other than *None*.

Record/Field: to map data by a specified record or field. You can choose All Records, Specific Record, and select a Record, or select a *Field*.

XPath: select to enter an XPath expression that will specify everything BUT the values you would like to map. Additional XPath text will be appended to your XPath based on the values specified on the Map Details page.

For example, if A and B are specified as Internal and External values, respectively, the XPath expression //RECORD_NAME/FIELDNAME would become //RECORD_NAME/FIELDNAME/text()[.='A'] for an outbound transaction.

If you select this option, enter a *Pattern*.

Defining Map Set Detail

Access the Map Set Detail page.

Application Class Path Specify an extension of class SCM_SAC_XMLMAPPER:Maps:MapBase. Be certain the specified class implements method TransformXMLString(). The system displays this field only when you have selected an application class map type on the Define Map page.

Application Class ID Select a valid application class ID that is available at the specified application class path. The system displays this field only when you have selected an application class map type on the Define Map page.

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Internal Value Enter the value you wish to convert to on an inbound transaction or convert from on an outbound transaction. The system displays this field only when you have selected an attribute value, field value, or values only map type on the Define Map page.

External Value Enter the value you wish to convert from on an inbound transaction or convert to on an outbound transaction. The system displays this field only when you have selected an attribute value, field value, or values only map type on the Define Map page.

Internal Field Name Enter the value you wish to convert to an inbound field name or from an outbound field name. The system displays this field only when you have selected a field alias map type on the Define Map page.

External Field Name Enter the value you wish to convert from an inbound field name or to an outbound field name. The system displays this field only when you have selected a field alias map type on the Define Map page.

SQL Object Identifier Select a SQL Object Identifier. The system displays this field only when you have selected a field value — SQL map type on the Define Map page.

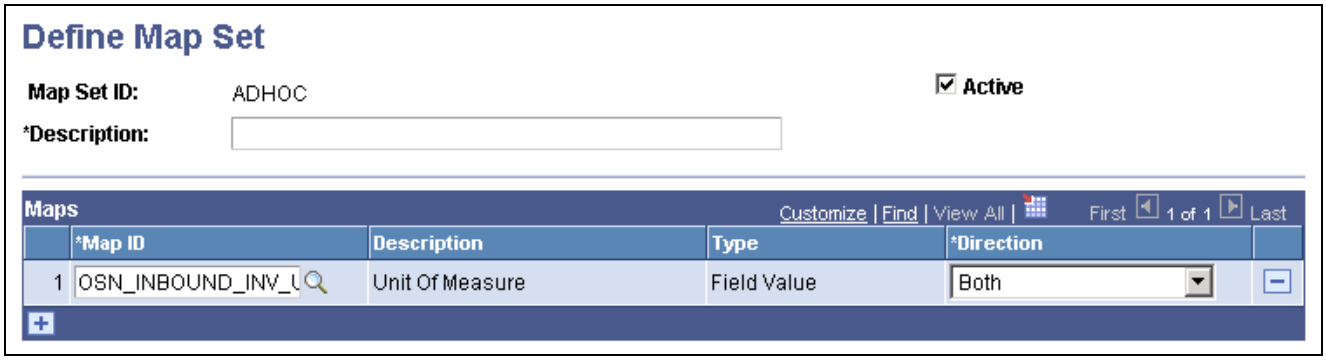
Internal Record Name Enter the value you wish to convert to on an inbound record or convert from on an outbound record. The system displays this field only when you have selected a record alias map type on the Define Map page.

External Record Name Enter the value you wish to convert from an inbound record name or to an outbound record name. The system displays this field only when you have selected a record alias map type on the Define Map page.

XSL Enter your own custom XSL transformation. The system displays this field only when you have selected a map type of XSL on the Define Map page.

Defining Map Sets

Access the Define Map Sets page.



Define Map Sets page

Map Set ID Create a map set ID to designate each map set.

Active This option must be selected for the XML mapper to complete data transformations.

Map ID Select a Map ID to associate with this map set. You can associate multiple map IDs with a single map set.

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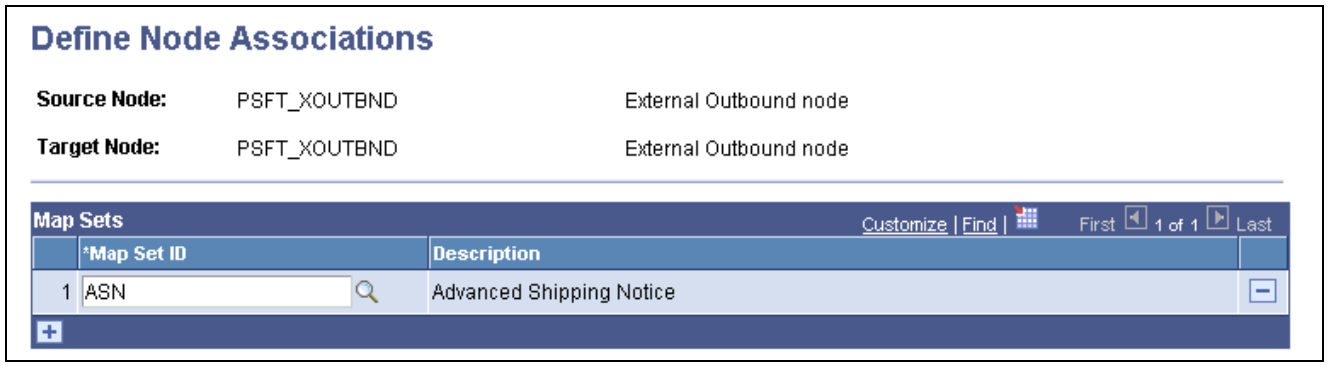
Direction Enter the direction for which the selected map should apply. Options include *Inbound* for inbound transactions, *Outbound* for outbound transactions, or *Both* if you want the map set to be used for inbound and outbound transactions.

Arrows Choose the order in which the maps should be run.

Defining Node Associations

Access the Define Node Associations page.



Define Node Associations page

Map Set ID Enter a map set ID to use with the source node and target node.

Arrows Choose the order in which the map sets should be run.

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CHAPTER 4

Processing Enterprise Integration Points (EIPs)

This chapter discusses how to:

- Process Inbound EIPs.
- Process Outbound EIPs.
- Process Backbone Interlinks.

Processing Inbound EIPs

This section discusses how to:

- Use transaction maintenance.
- Use data definition maintenance.
- Purge transactions.

Pages Used to Process Inbound EIPs

Page Name	Object Name	Navigation	Usage
Transaction Maintenance	BCT_CTL_UPD	SCM Integrations, Transaction Error Handling, Maintain Transactions, Transaction Maintenance	View all electronic transactions in the transaction log and access the detail pages that enable you to correct transaction errors.
Data Def Maint	EO_EIP_CTL_MAINT	SCM Integrations, Transaction Error Handling, Maintain Data Definitions, Data Def Maint	View data detail or correct errors for inbound EIPs that contain data rather than transactions.
Purge	BCT_INV_REQPURG	SCM Integrations, Process Transactions, Purge, Transactional Data, Purge	Initiate the Purge Application Engine process (IN_BCT_PURGE) that purges transactions for EIPs.

Using Transaction Maintenance

Access the Transaction Maintenance page.

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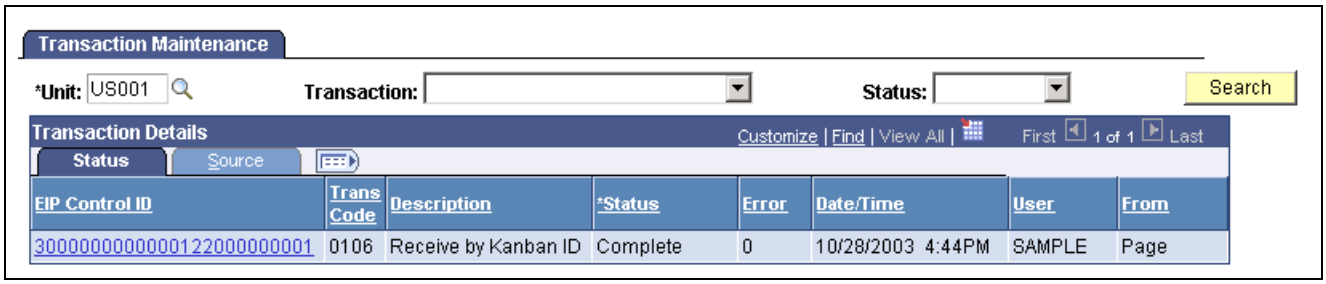

Transaction Maintenance page

All transactional-based information appears on this page. The system displays the transaction code, which identifies the transaction type, and the transaction description.

EIP Control ID Click this link to view the transaction line details for the transaction. Detail pages for each transaction type, which are accessible from this page, provide error messages and transaction details that enable you to revise fields containing errors.

You can modify the transaction status here or in the Transaction Maintenance Detail pages. The rules for changing a transaction status are:

Current Status	Change to Status
New	Complete (cancels all lines in the transaction).
Error	Complete (cancels all lines in the transaction). Reprocess.
Complete	Can't be changed.
In Process	Can't be changed.
Reprocess	Complete (cancels all lines in the transaction).
Incomplete	Can't be changed.

Using Data Definition Maintenance

Access the Data Def Maint (data definition maintenance) page.

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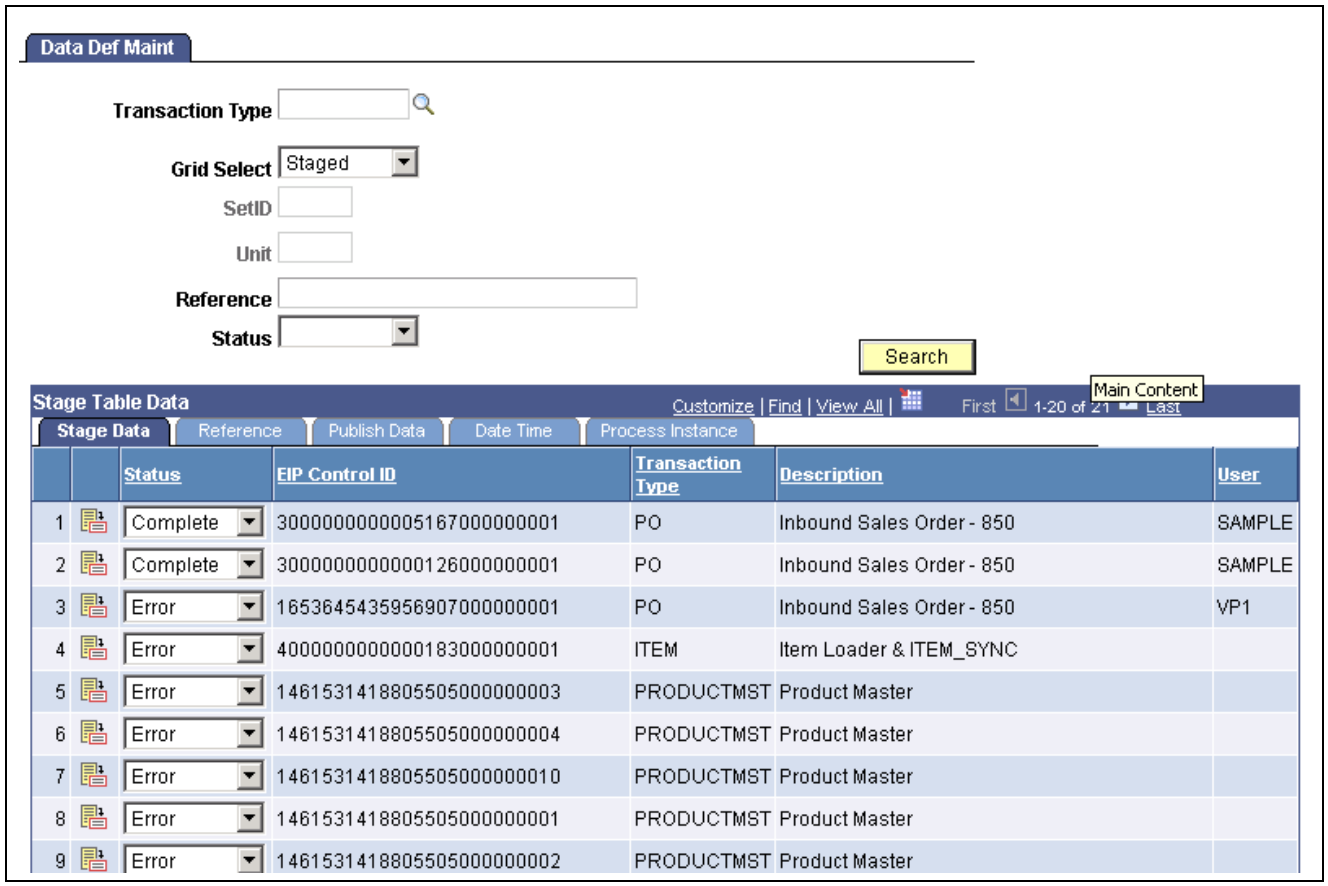

Data Def Maint (page)

All data definition transactions appear on this page. Detail pages for each transaction type, which are accessible from this page, provide error messages and transaction details that allow you to revise fields containing errors.

If you want to retrieve records by transaction, select one of these transaction types:

Transaction Type	Description
AP - 100	Retrieves vendor synchronization transactions that have been received. To receive vendor synchronization transactions, you must have PeopleSoft Payables installed.
AP - 200	Retrieves vendor edit transactions that have been received. To receive voucher edit transactions, you must have PeopleSoft Payables installed.
ASNIN	Retrieves advanced shipping receipt transactions that have been received. To receive Advanced Shipping Receipt transactions, you must have PeopleSoft Purchasing installed.

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Transaction Type	Description
BOM	Retrieves bills of material transactions that have been received. To receive bills of material transactions, you must have PeopleSoft Manufacturing installed.
CONSUMER	Retrieves consumer sync transactions that have been received. To receive consumer sync transactions, you must have PeopleSoft Inventory installed.
ITEM	Retrieves item loader and item sync transactions that have been received. To receive item loader and item sync transactions, you must have PeopleSoft Inventory, PeopleSoft eProcurement, or PeopleSoft Purchasing installed.
ITM_MFGGPO	Retrieves manufacturer group purchasing organization (GPO) item price list transactions that have been received. To receive manufacturer GPO item price list transactions, you must have PeopleSoft Purchasing or PeopleSoft Inventory installed.
PO	Retrieves purchase order transactions that have been received. To receive inbound sales order (850) transactions, you must have PeopleSoft Order Management installed.
POACK	Retrieves purchase order acknowledgement transactions that have been received. To receive purchase order acknowledgement transactions, you must have PeopleSoft Purchasing installed.
POCHG	Retrieves purchase order change transactions that have been received. To receive sales order change (860) transactions, you must have PeopleSoft Order Management installed.
PROCARD	Retrieves procurement card transactions that have been received. To receive procurement card transactions, you must have PeopleSoft Purchasing or PeopleSoft eProcurement installed.
PRODUCTMST	Retrieves product master transactions that have been received. To receive product master transactions, you must have PeopleSoft Order Management installed.

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Transaction Type	Description
REQLOAD	Retrieves requisition loader transactions that have been received. To receive requisition loader transactions, you must have PeopleSoft Purchasing or PeopleSoft eProcurement installed.
RFQ	Retrieves request for quotation (RFQ) transactions that have been received. To receive inbound request for quote (840) transactions, you must have PeopleSoft Order Management and PeopleSoft Purchasing installed.
RFQRESP	Retrieves RFQ response transactions that have been received. To receive RFQ response transactions, you must have PeopleSoft Purchasing installed.
RMALOAD	Retrieves inventory RMA transactions that have been received. To receive RMA load transactions, you must have PeopleSoft Inventory installed.

Grid Select Some transactions are loaded into staging tables while others remain in the Integration Broker queue until they are successfully processed. Select *Queue* to view those residing in the Integration Broker queue and *Staged* to view those that are in a stage table.

Search Click this button to display all the transactions that match the search criteria selected.

Note. To display all of the records in the transaction log, leave the search criteria fields blank.

Click the Show Detail Entry button to access the detail pages. Detail pages for each transaction type, which are accessible from this page, provide error messages and transaction details that enable you to revise fields containing errors.

Purging Transactions

Access the Purge page.

Use this page to initiate the Purge process. The Purge process will delete all transactions with a status of *Complete* or *Confirmed* from the transaction log.

Use the Data Collection Setup page to choose to not maintain a history, to maintain a history for all transactions, or to maintain a history only for transactions containing errors. You can also determine whether to purge transactions with a status of *Complete* or *Confirmed* on this page.

You can view the transaction history by running a query. Use the BCT_HIST and BCT_ERR_HIST tables to view the transaction history.

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Inbound Data to Purge

You can choose to purge all transactions, whereby the system purges all transactions containing either the *Confirmed* or *Complete* status that you set up on the Data Collection Setup page. Or you can enter a number of days to purge only items with at least that many days since the last activity.

Processing Outbound EIPs

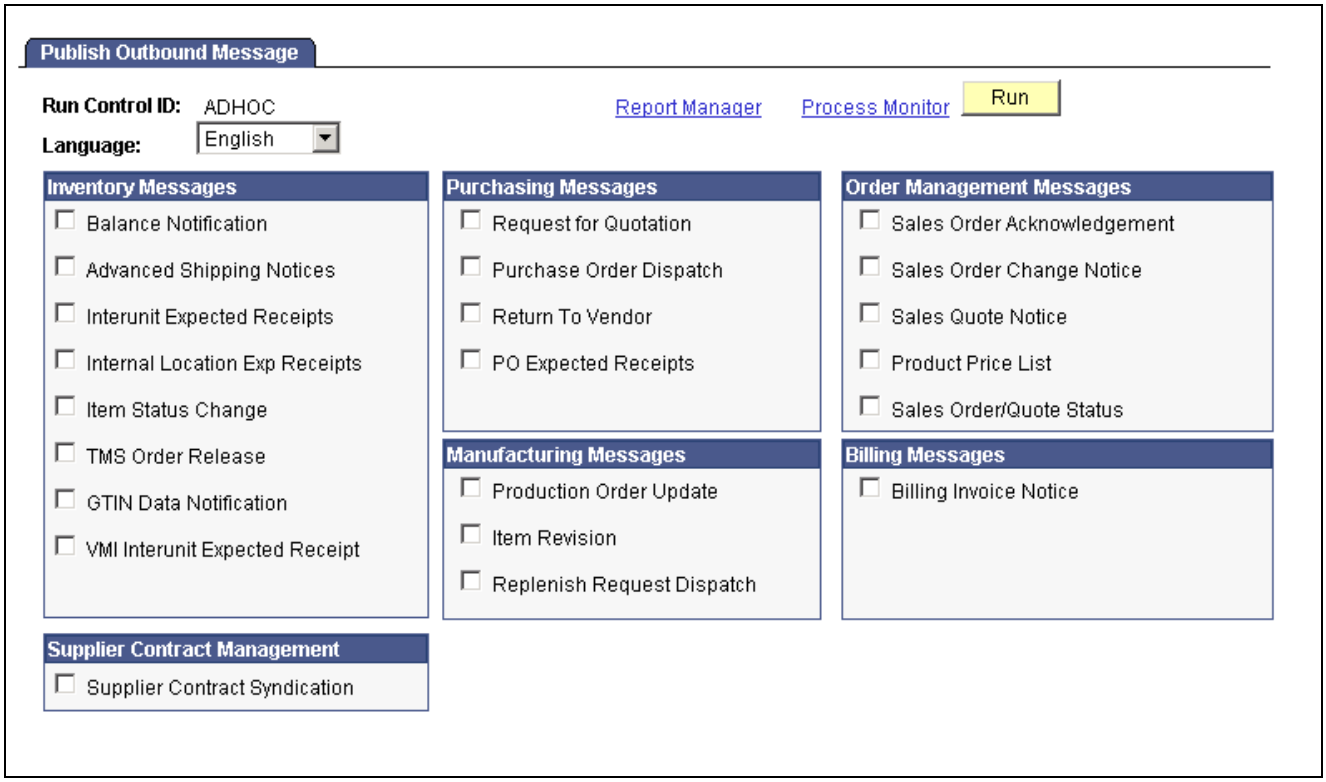
This section discusses how to process outbound EIPs.

Page Used to Process Outbound EIPs

Page Name	Object Name	Navigation	Usage
Publish Outbound Message	IN_RUN_PUB_MSG	SCM Integrations, Publish Outbound Message	Initiate the outbound message publish process for outbound PeopleSoft SCM transactions that use the batch publish design pattern.

Processing Outbound EIPs

Access the Publish Outbound Message page.



Publish Outbound Message page

Note. This page is used only to process transactions that use the batch publish design pattern.

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Select the check box by the name of the message (service operation) that you want to process. The system then makes the message name a link to a transaction-specific page for that service operation. You can process service operations one at a time or in multiples.

Processing Backbone Interlinks

This section discusses how to run the Backbone Interlink process.

Page Used to Process Backbone Interlinks

Page Name	Object Name	Navigation	Usage
BankBone InterlinX - Process Request	SAC_BBIX_RUN_CNTL	SCM Integrations, BackBone InterlinX, Run BBIX Process, BankBone InterlinX - Process Request	Initiates transferring data from one PeopleSoft database to another.

Running the Backbone Interlink Process

Access the BankBone InterlinX - Process Request page.

Override Select this check box to override the integration's default filter with a custom filter to use when processing the integration. Once selected, the system makes the Filter field available for entry.

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CHAPTER 5

Reviewing EIP Examples

In this chapter, we provide an overview discussion of EIP examples, and discuss how to:

- Set up the Sales Order Load EIP.
- Process the Sales Order Load EIP.
- Set up the Sales Orders Acknowledgement EIP.
- Process the Sales Orders Acknowledgement EIP.
- Set up the Purchase Order Dispatch EIP.
- Process the Purchase Order Dispatch EIP.
- Set up the Advanced Shipping Notice EIP.
- Process the Advanced Shipping Notice EIP.
- Set up the Billing Invoice EIP.
- Process the Billing Invoice EIP.

Understanding EIP Examples

We are providing examples of the most commonly used SCM EIPs. EIP setup and processing is similar for EIPs of the same design pattern, so you can use this information and apply it to other EIPs. In this chapter, we discuss setting up and processing the following EIPs:

- Sales Order Load
- Sales Order Acknowledgement
- Purchase Order Dispatch
- Advanced Shipment Notice
- Billing Invoice

See Chapter 3, "Implementing Integrations," Setting Up Service Operations, page 83.

See Chapter 2, "Understanding PeopleSoft Supply Chain Management Enterprise Integration Points," PeopleSoft SCM Inbound EIPs, page 9.

See Chapter 2, "Understanding PeopleSoft Supply Chain Management Enterprise Integration Points," PeopleSoft SCM Outbound EIPs, page 12.

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EIP	Description
Sales Order	Loads sales orders.
Sales Order Acknowledgement	Sends message acknowledging receipt of sales order.
Purchase Order Dispatch	Purchase order dispatched to a vendor using the Publish Outbound Message process
Advanced Shipping Notice	Notifies customers that their sales orders have been shipped using the Publish Outbound Message process.
Billing Invoice	Invoice sent out to a customer using the Publish Outbound Message process.

Common Elements in this Chapter

Asynchronous Messages that do not require a response. These messages are sent to the destination system as one-way messages, and are used for publish and subscribe messages where there may be a lapse in time between the message being sent and received.

Batch Publish Use this design pattern to publish messages from a batch application. The batch application can be a COBOL or Structured Query Report program that takes either a procedural or set-based approach, or it can be an Application Engine set-based program.

Batch Subscribe This design pattern enables you to perform edits against messages in sets. This can be a useful technique for high volume data, including millions of inbound rows. This design pattern is useful when you know that a single message definition may contain multiple instances of a transaction, or when you must reuse an existing batch program.

Component Publish In this design pattern, the transaction or setup data that you want to send out of PeopleSoft is being updated by using a PeopleSoft component. In this case, the data is already in the component buffer, and the Publish PeopleCode function is used to publish a message.

Full Table Publish Use this design pattern to populate an entire copy of a table onto a remote database or legacy system. Generally, full data replication occurs with setup tables, or relatively static, low-volume tables that are keyed by setID. When a copy of a table exists on the remote system, incremental updates can be used.

Full Table Subscribe Use this design pattern to subscribe to messages that contain an entire copy of a table that is published from a remote database or legacy system. Generally, full data replication occurs with setup tables, or relatively static, low-volume tables that are keyed by setID. When a copy of a table exists on the remote system, incremental updates can be used.

Synchronous Occurring or existing at the same time. Used for messages that are sent out and receive an immediate response.

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Setting Up the Sales Order Load EIP

This section discusses the Sales Order Load EIP.

Understanding the Sales Order Load EIP

The Sales Order Load EIP is an asynchronous inbound service operation used to load sales orders from a third-party into PeopleSoft Order Management. The Sales Order Load EIP meets EDI requirements of the X.12 850 transaction set.

Before you can receive sales orders using with the Sales Order Load EIP, you must:

Type of Setup	Steps
Complete application setup	None for this message.
Complete Integration Broker setup	• Activate the SALES_ORDER_LOAD service operation. • Verify the queue is in run mode. • Activate the handler. • Activate the routing. • Confirm the parameters of the routing definition. • Verify the node is active. • Define rules to load EDI flat files.
Complete Enterprise Component setup	Define rules to load flat files not using an EDI format.

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Page Used to Set Up the Sales Order Load EIP

Page Name	Object Name	Navigation	Usage
Service Operations-General	IB_SERVICE	PeopleTools, Integration Broker, Integration Setup, Service Operations, General	Define and activate a service operation.
Service Operations-Handlers	IB_SERVICEHDLR	PeopleTools, Integration Broker, Integration Setup, Service Operations, Handlers	Activate one or more service operation handlers.
Service Operations-Routings	IB_SERVICERTNGS	PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings	Define and activate routing definitions on the service operation.
Queue Definitions	IB_QUEUEDEFN	• PeopleTools, Integration Broker, Integration Setup, Service Operations, General. Select the Queue link attached to this service operation. • PeopleTools, Integration Broker, Integration Setup, Queues	Activate the queue used by the service operation.
Routings-Parameters	IB_ROUTINGDEFNDOC	• PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings. Select the link attached to the routing definition name, then select the Parameters tab. • PeopleTools, Integration Broker, Integration Setup, Routings, Parameters	Verify the external service alias name, nodes, and transform programs used by this routing.
Node Definitions	IB_NODE	PeopleTools, Integration Broker, Integration Setup, Nodes, Node Definitions	Activate node used by the service operation.
Inbound File Loader Rules	PSIBINFILERULE	PeopleTools, Integration Broker, File Utilities, Inbound File Loader Rules	Establish inbound file rules to load sales order data from a flat file using an EDI X.12 850 format.
File Inbound	EO_FILE_INBOUND	Enterprise Components, Integration Definitions, Inbound File Rule	Establish inbound file rules to load sales order data from a flat file not using an EDI format.

Activating the Sales Order Load Service Operations

Use the PeopleSoft Integration Broker to activate the SALES_ORDER_LOAD service operations.

Access the Service Operations-General page.

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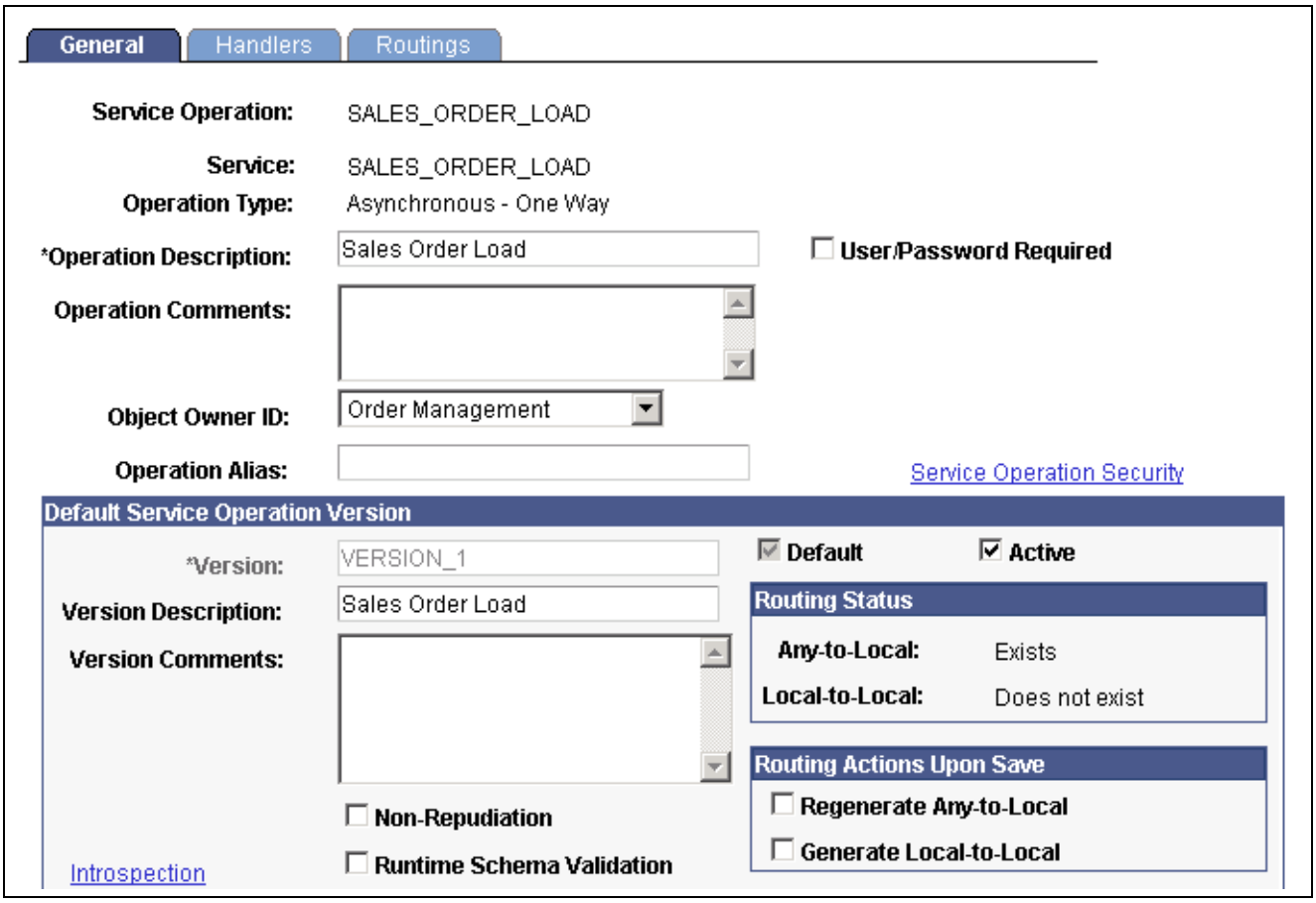
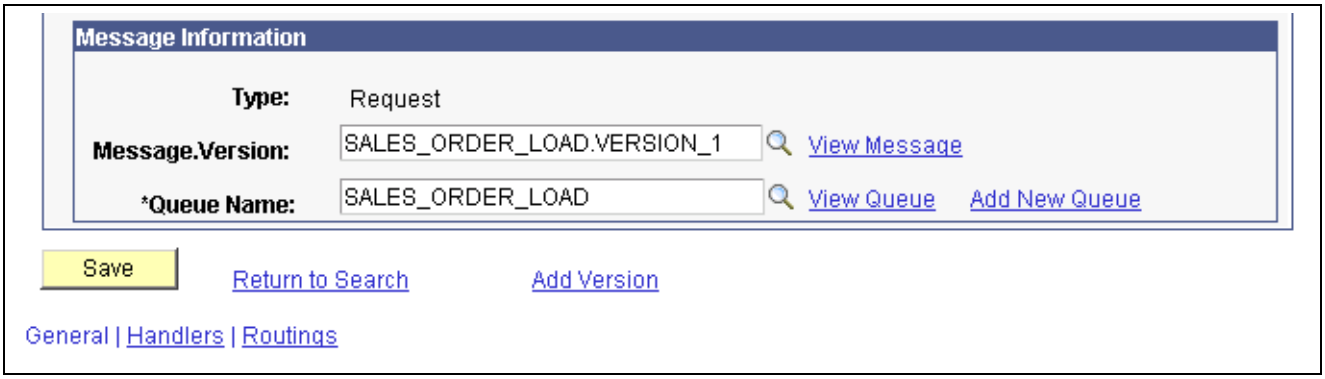


Service Operations-General page (1 or 2)



Service Operations-General page (2 or 2)

For the SALES_ORDER_LOAD service operation, select the Active check box for the applicable service operation version. If the desired version is not the default version for the service operation, the default version must also be activated.

If the inbound sales order data is a flat file using the EDI format X.12 850, then you must activate the EDI_TXN_850 service operation in addition to the SALES_ORDER_LOAD service operation.

On the General tab of the Service Operations component, select the View Queue link at the bottom of the page to access the Queue Definitions page.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

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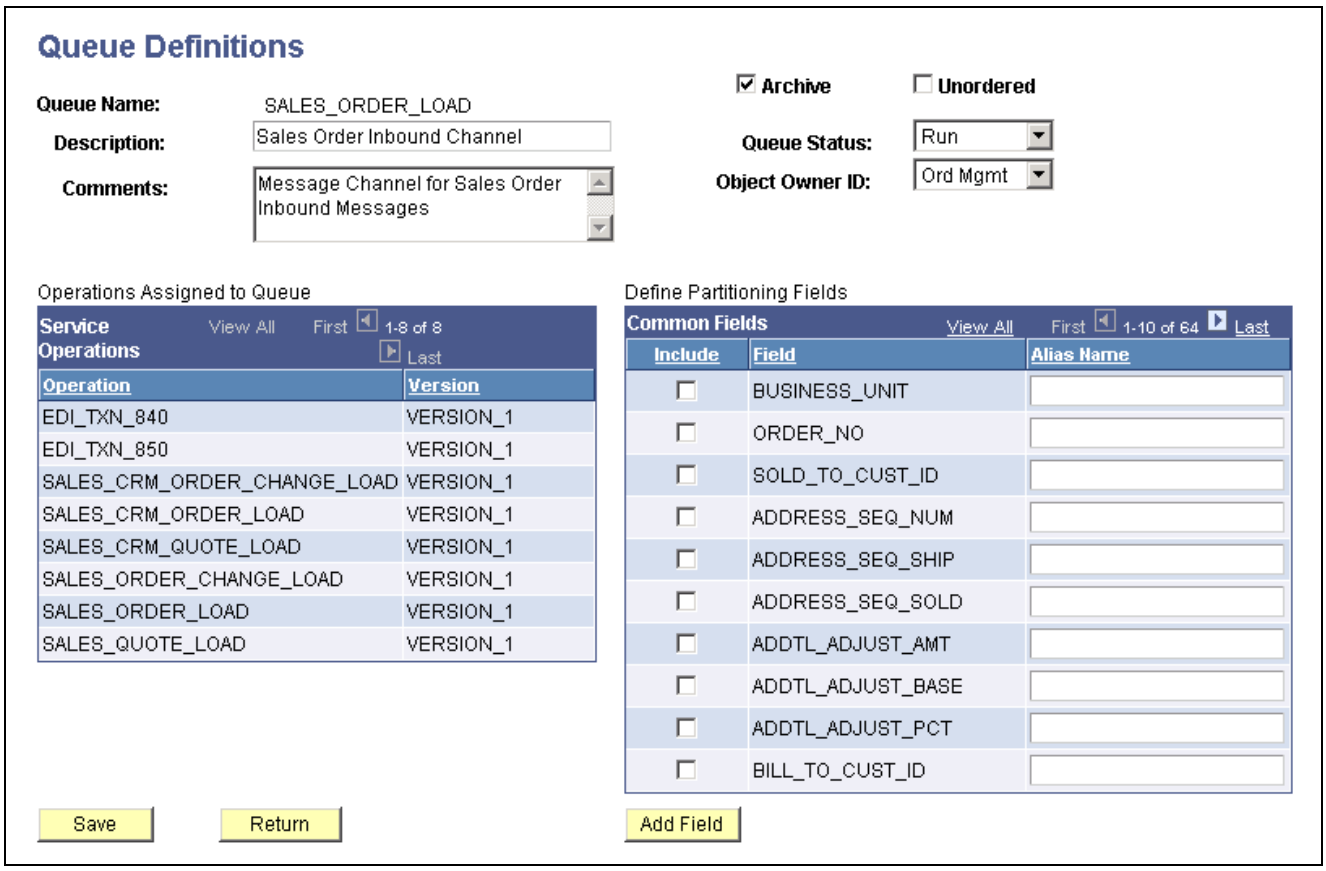
Verifying the Queue is in Run Mode

Access the Queue Definitions page.



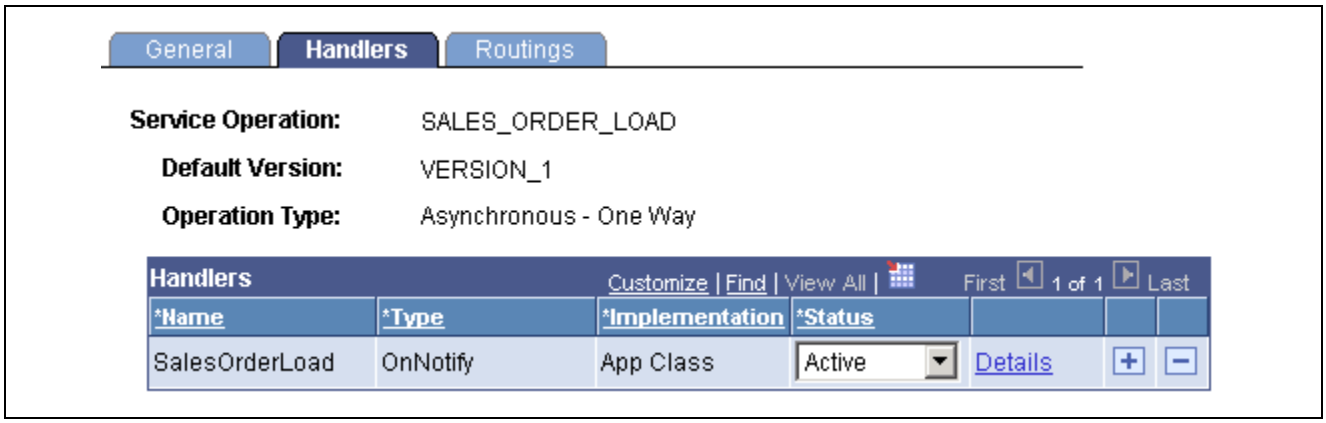
Queue Definitions page

For the SALES_ORDER_LOAD queue, verify the Queue Status field has a value of *Run.*

Click the Return button to go back to the Service Operations component.

Activating the Handler

Access the Service Operations-Handlers page.



Service Operations-Handlers page

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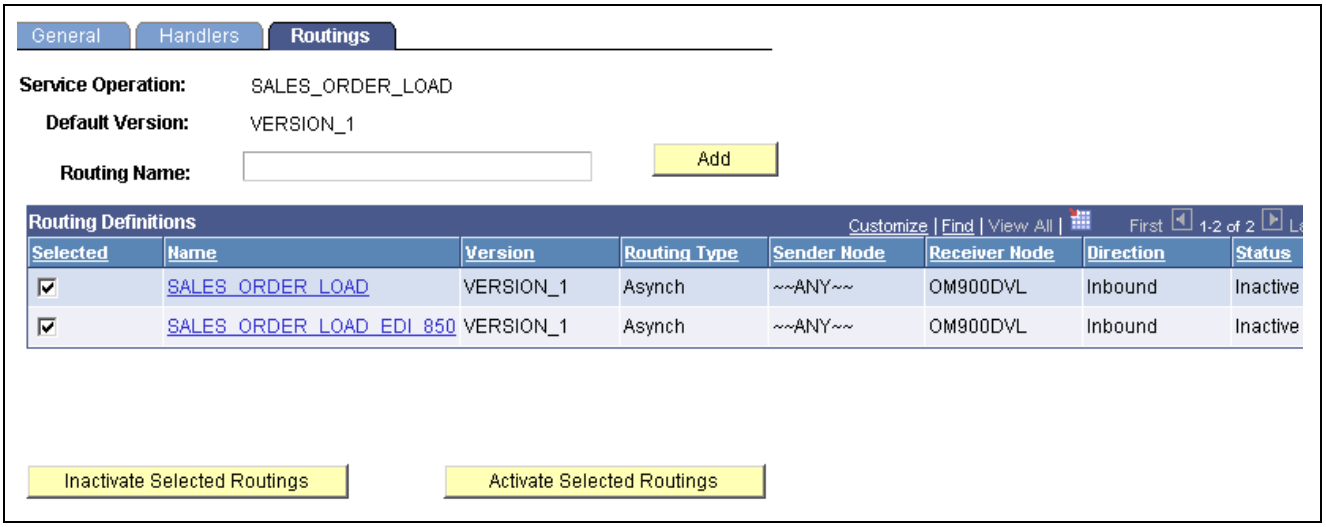
For the SALES_ORDER_LOAD service operation, click the Handlers tab of the Service Operations component. Select the value of *Active* in the Status field for the SalesOrderLoad handler.

Activating the Routings

Access the Service Operations-Routings page.



Service Operations-Routings page

For the SALES_ORDER_LOAD service operation, click the Routings tab of the Service Operations component. Activate an inbound routing definition for each sender node and external alias name that will be permitted to send in sales order data. In this example, both delivered routings permit data to be sent from any valid node, but each routing has a unique external alias and purpose. To activate a routing, select the check box next to the routing definition and click the Activate Selected Routings button. There are two delivered routing definitions:

- The SALES_ORDER_LOAD routing definition is used to receive inbound sales order data using an XML format.
- The SALES_ORDER_LOAD_EDI_850 routing definition is used to receive inbound sales order data using the EDI X.12 850 transaction format and transform the data to the standard PeopleSoft format for sales orders.

Select the link attached to the routing definition name to access the Routings component and confirm the routing definition parameters.

Confirming the Parameters of the Routing Definition

Access the Routings-Parameters page.

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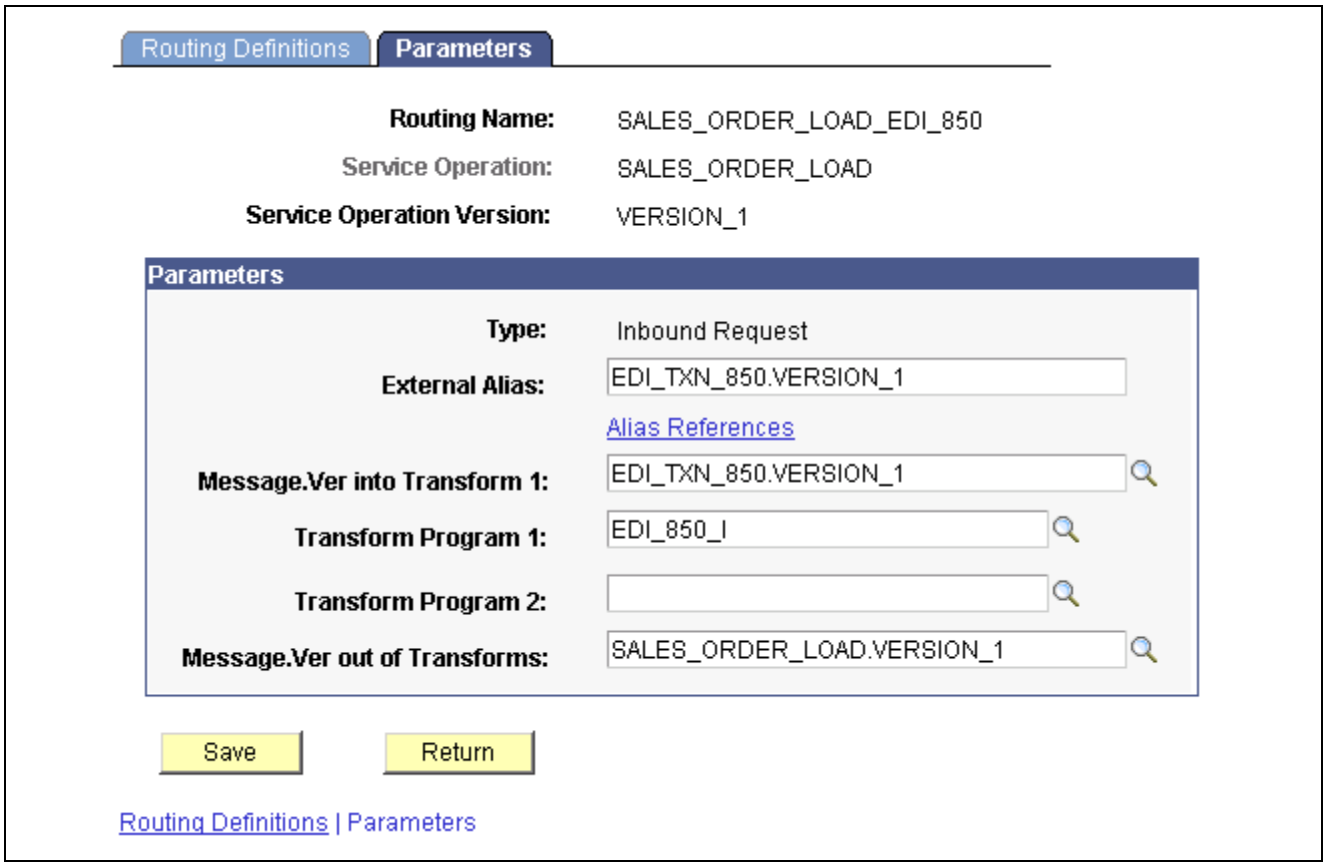

Routings-Parameters page

On the Routings tab of the Service Operations component, select the link attached to the routing definition name. This link accesses the Routing Definitions component. Select the Parameters tab and complete the following steps:

1. Confirm the external alias name in the External Alias field for the routing is correct. When sending or receiving data, the Integration Broker determines which routing to use by referring to the external alias name, not the routing name.
2. Add or change the transform programs on this routing definition. A routing definition defines the sending and receiving nodes for a transaction and specifies any inbound and outbound transformations to invoke. A transform program is a type of PeopleSoft Application Engine program that can convert data from one format to another; for example, from XML to a flat file. Use a transform program when one node sends a request or response message with a data structure different from the structure required by the other node. You must decide, based on your environment, to change, remove, or add transform programs. The SALES_ORDER_LOAD_EDI_850 routing definition is delivered with the transform program, EDI_850_I, to convert incoming data from the EDI X.12 850 transaction format to the standard PeopleSoft format for sales orders. If you are not using EDI then you will want to use the SALES_ORDER_LOAD routing definition instead.

Verifying the Node is Active

Access the Node Definitions page.

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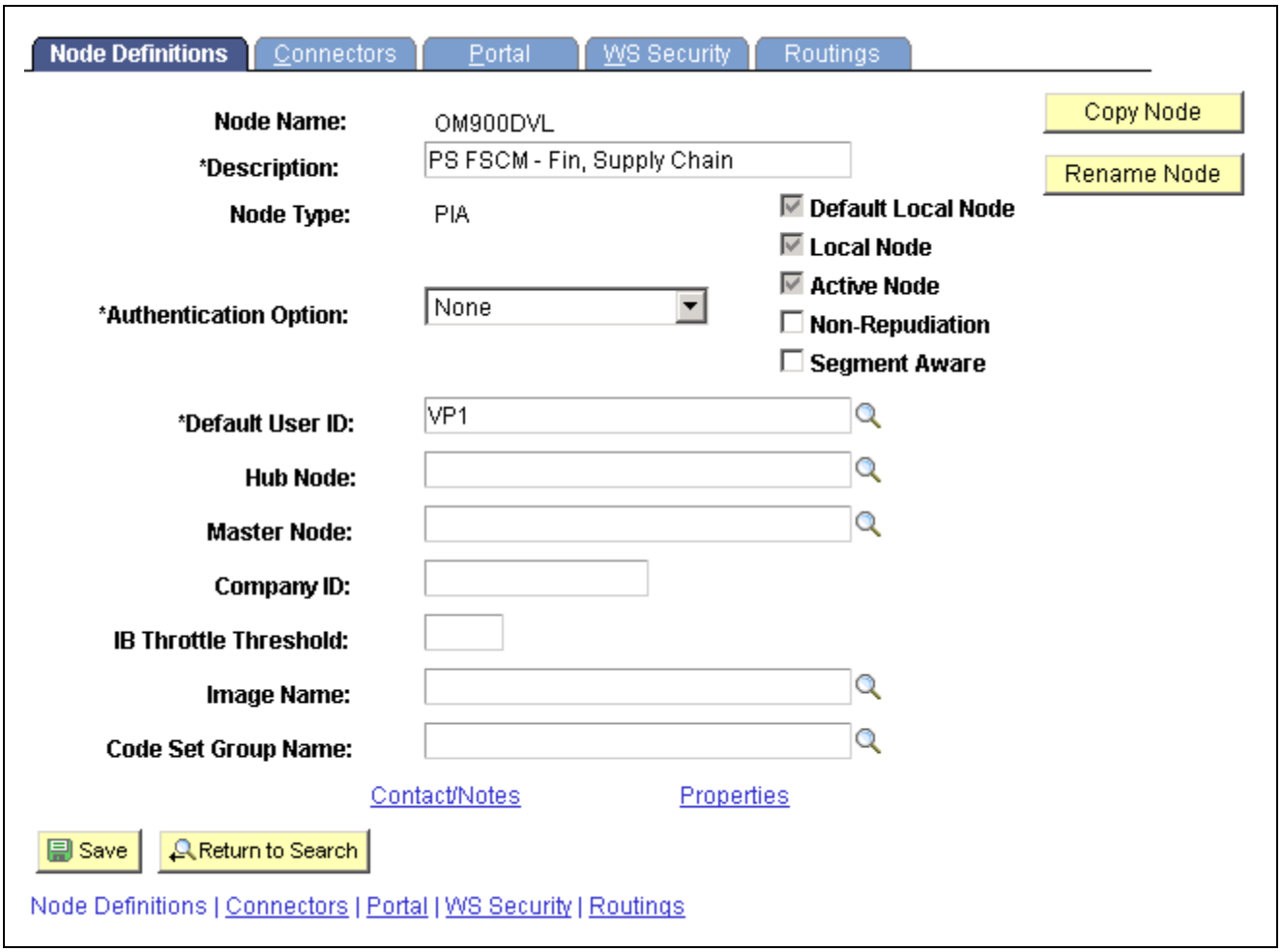

Node Definitions page

Verify the Active Node check box has been selected for any nodes used in the routings that you activated on the Service Operations-Routings page for SALES_ORDER_LOAD service operation. If the routings are from "ANY" node, verify each node you plan to integrate from is active.

Setting the Inbound File Rule for EDI Flat File Data

Access the Inbound File Loader Rules page.

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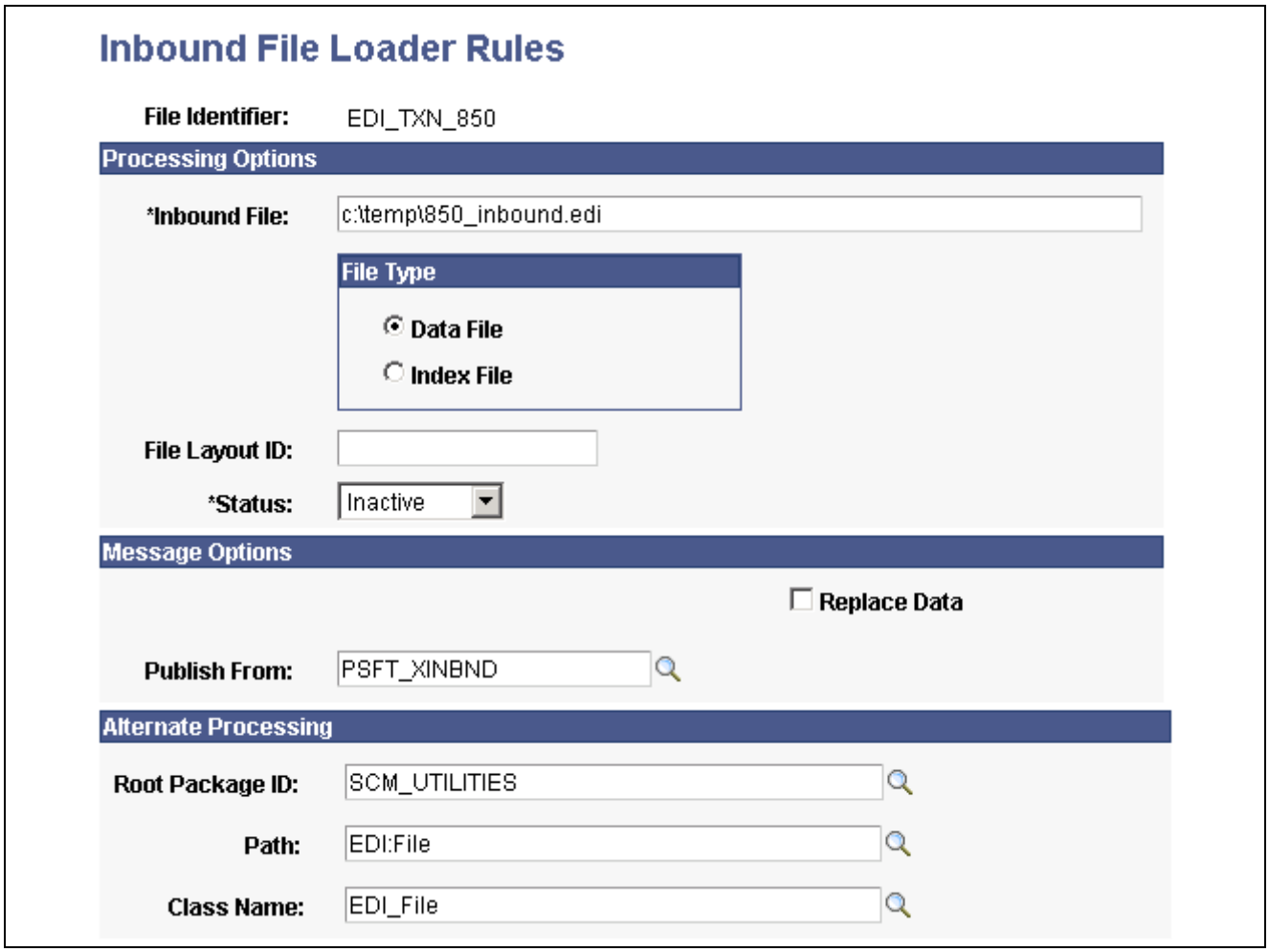
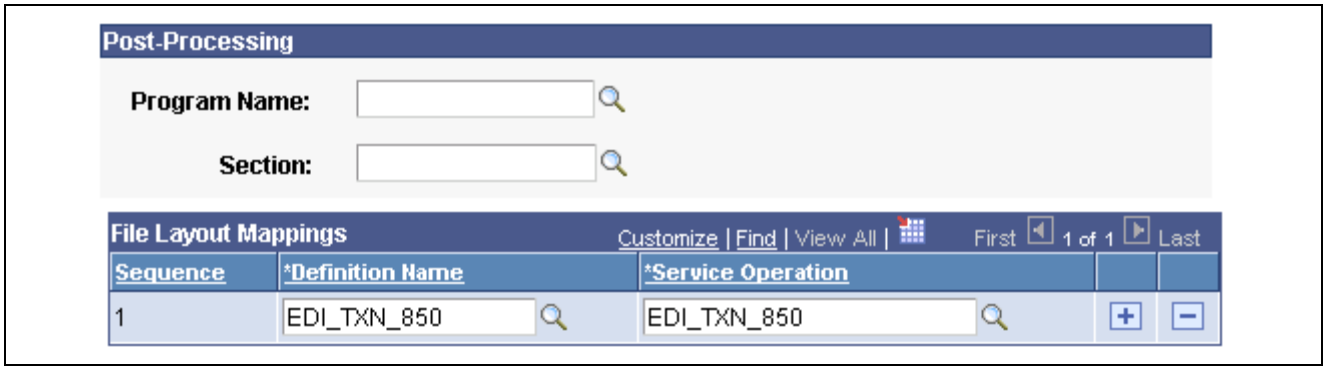


Inbound File Loader Rules page (1 of 2)



Inbound File Loader Rules page (2 of 2)

For inbound flat file data using the EDI X.12 850 format, configure and activate the inbound file loader rule within PeopleSoft Integration Broker.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker, "Using the Inbound File Loader Utility"

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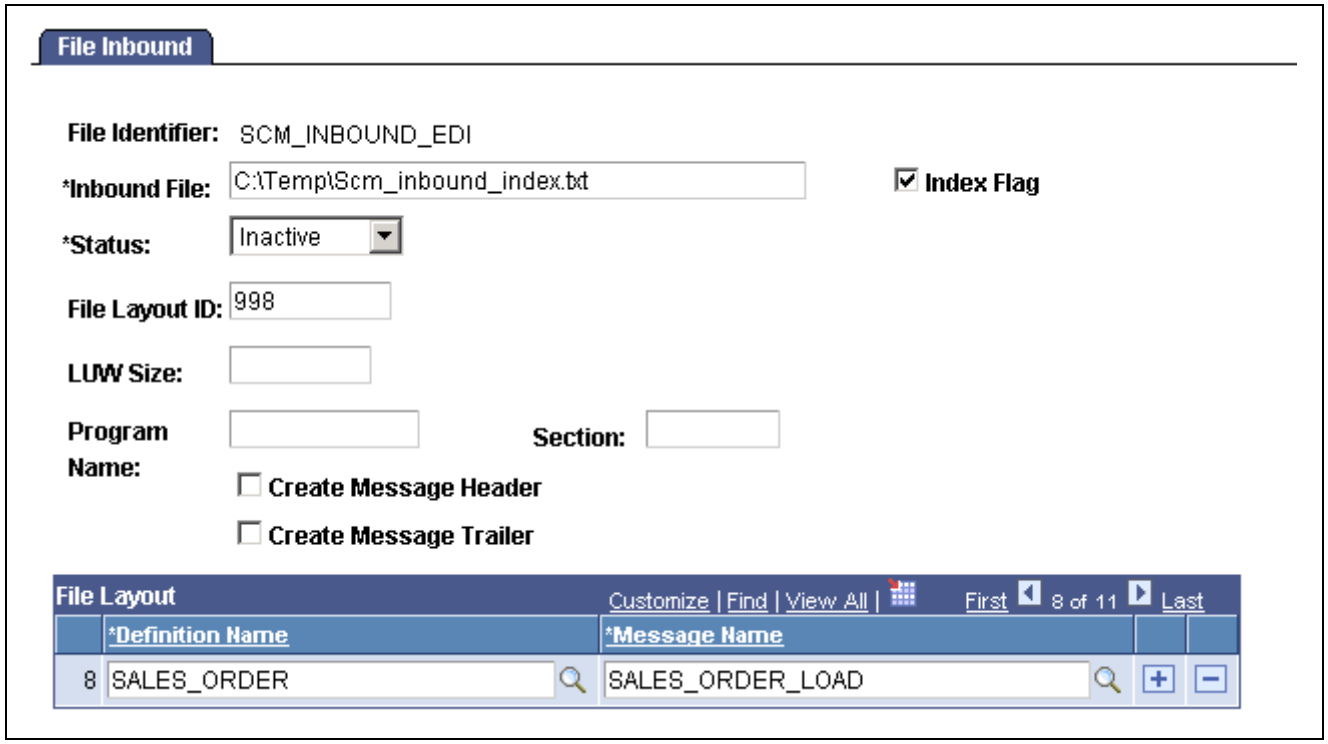
Setting the Inbound File Rule for Non-EDI Flat File Data

Access the File Inbound page.



File Inbound page

For inbound flat files that are not using the EDI X.12 850 format, configure and activate the inbound file rule within the PeopleSoft Enterprise Components menu.

1. Adding the Definition Name of *SALES_ORDER*, and Message Name of *SALES_ORDER_LOAD*.
2. Confirming that the Status field is set to *Active*.

Note. If the file identified in the Inbound File field is an index file, as shown in the page shot above, then the index file lists the names of a set of data files to be processed. Each line of the index file must reference a plain text file using a file name with full directory path information. The wildcards * and ? may be used only in the file name and not in the directory path.

See Also

PeopleSoft Enterprise Components for PeopleSoft Enterprise Financial Management Solutions, Enterprise Service Automation, Asset Lifecycle Management, and Supply Chain Management 9.0 PeopleBook

Processing the Sales Order Load EIP

This section discusses how you process inbound sales orders.

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Pages Used to Process Sales Orders Load EIP

Page Name	Object Name	Navigation	Usage
Inbound File Processing	PSIBFILERUNCNTL	PeopleTools, Integration Broker, File Utilities, Inbound File Processing	Launch this process to load sales order data from a flat file using an EDI X.12 850 format. The data is loaded into PeopleSoft's staging tables.
Inbound File	EO_FILETOMSG	Enterprise Components, Integration Definitions, Initiate Processes, Inbound File Publish	Launch this process to bring sales order data in a non-EDI flat file (EDI X.12 850 format) into PeopleSoft's inbound staging tables.
Electronic Commerce	RUN_OM_EC	Order Management, Electronic Commerce, Process Staged Orders/RFQs	Launch this process to load inbound sales order data from the inbound staging tables to the PeopleSoft production tables.
Data Def Maint (Data Definition Maintenance)	EO_EIP_CTL_MAINT	SCM Integrations, Transaction Error Handling, Maintain Data Definitions	View data detail or correct errors for inbound sales order transactions.
Error Summary	OM_EIP_ORDERS	Click the Detail button on the Data Definition Maintenance page.	View the error queue for inbound sales order data that failed to load into the PeopleSoft production tables.
Order Completion	RUN_OM_BACKGRND	Order Management, Quotes and Orders, Process Orders, Order Completion	Run the Order Completion process to complete processing for the request for all inbound sales order data.

Loading EDI Flat File Data

Access the Inbound File Processing page.

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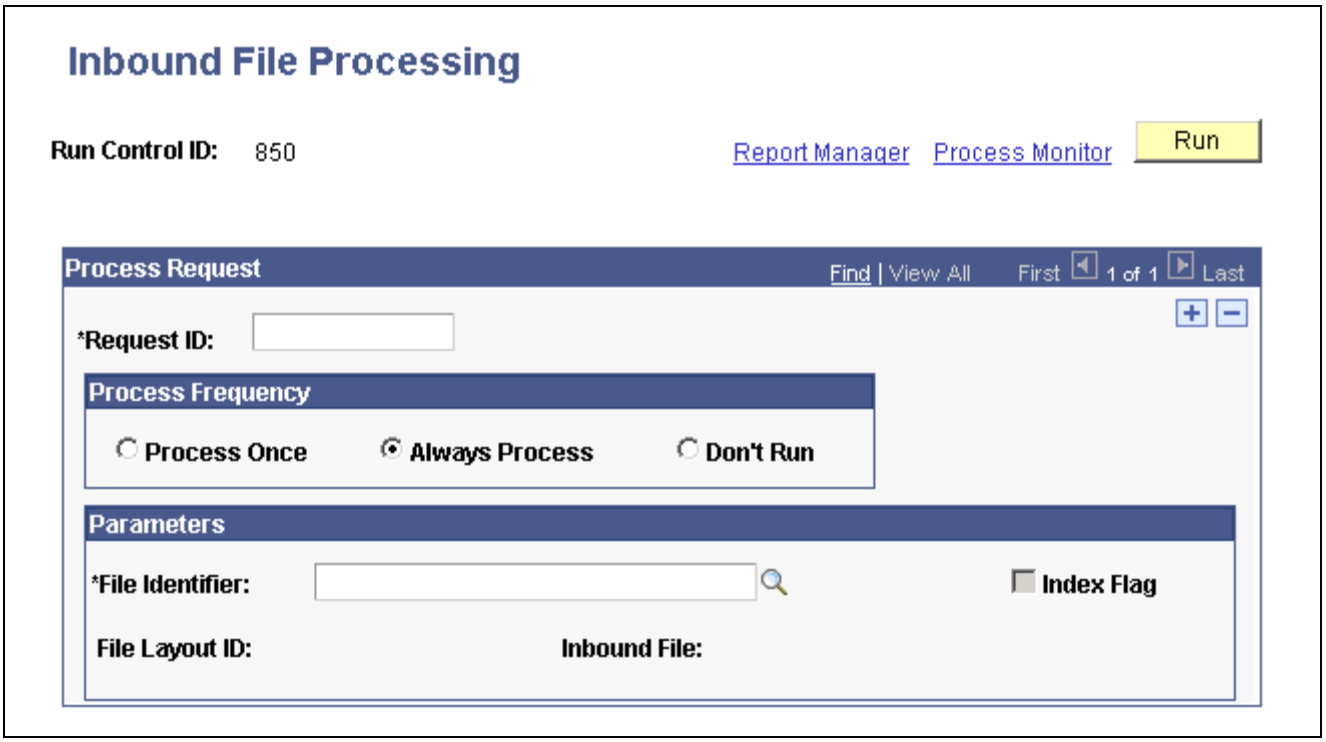

Inbound File Processing page

For inbound flat file data using the EDI X.12 850 format, use the Inbound File Processing run control page to launch the Application Engine process PTIB_INFILE that initiates the file-to-message processing. The file-to-message processing function reads the file and publishes it as a message.

File Identifier Select or enter the name of the file identifier that you set up in the Inbound File Loader Rules page. The file identifier is tied to the publish rules.

Index Flag A read-only field that indicates if the file being processed is an index file or a data file. When checked, the Inbound File Loader utility is processing an index file.

File Layout ID A read-only field that displays the file layout ID associated with the file in the Inbound File Loader Rules page.

Inbound File A read-only field that displays the name of the file being processed.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker, "Using the Inbound File Loader Utility"

Loading Non-EDI Flat File Data

Access the Inbound File process page.

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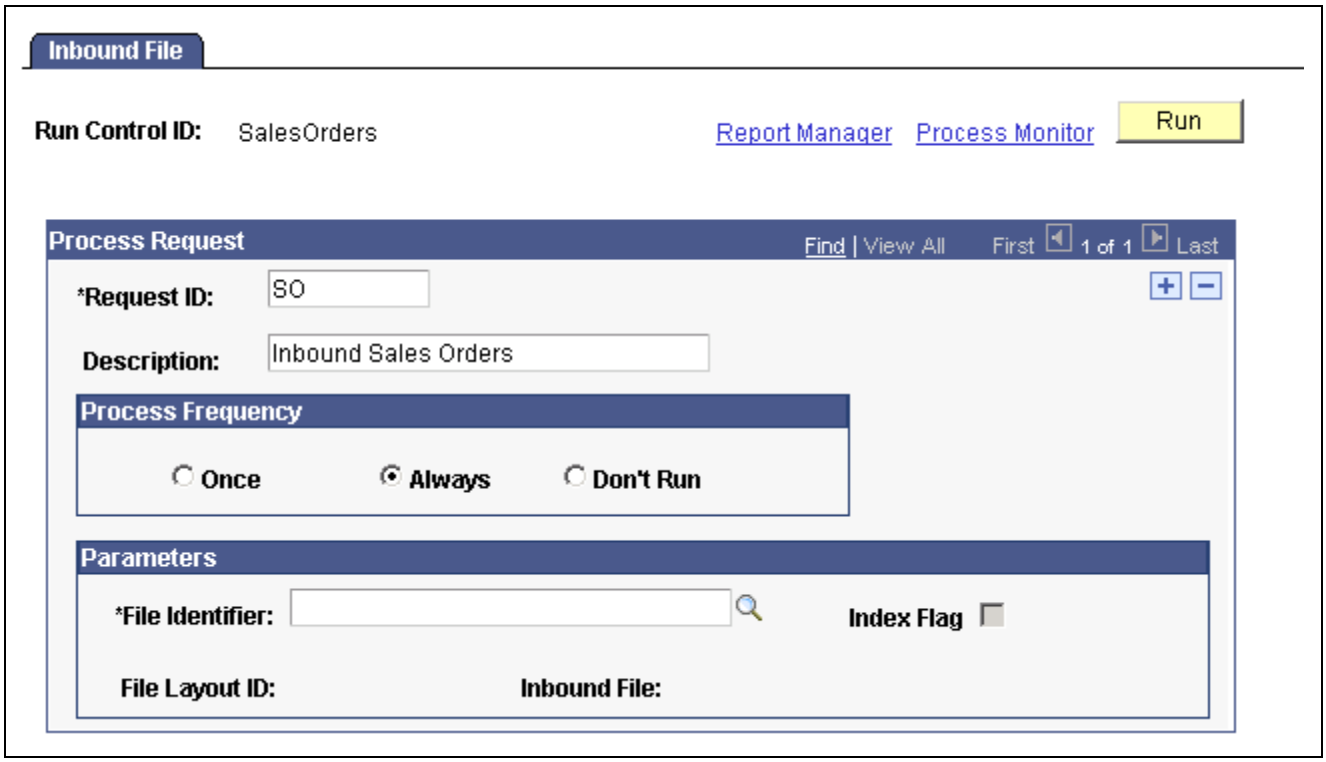

Inbound File process page

For inbound flat file data not using the EDI format, use the Inbound File run control page to launch an Application Engine process that initiates the file-to-message processing. The file-to-message processing function reads the file and publishes it as a message.

See Also

PeopleSoft Enterprise Components for PeopleSoft Enterprise Financial Management Solutions, Enterprise Service Automation, Asset Lifecycle Management, and Supply Chain Management 9.0 PeopleBook

Running Electronic Commerce

Access the Run Electronic Commerce page.

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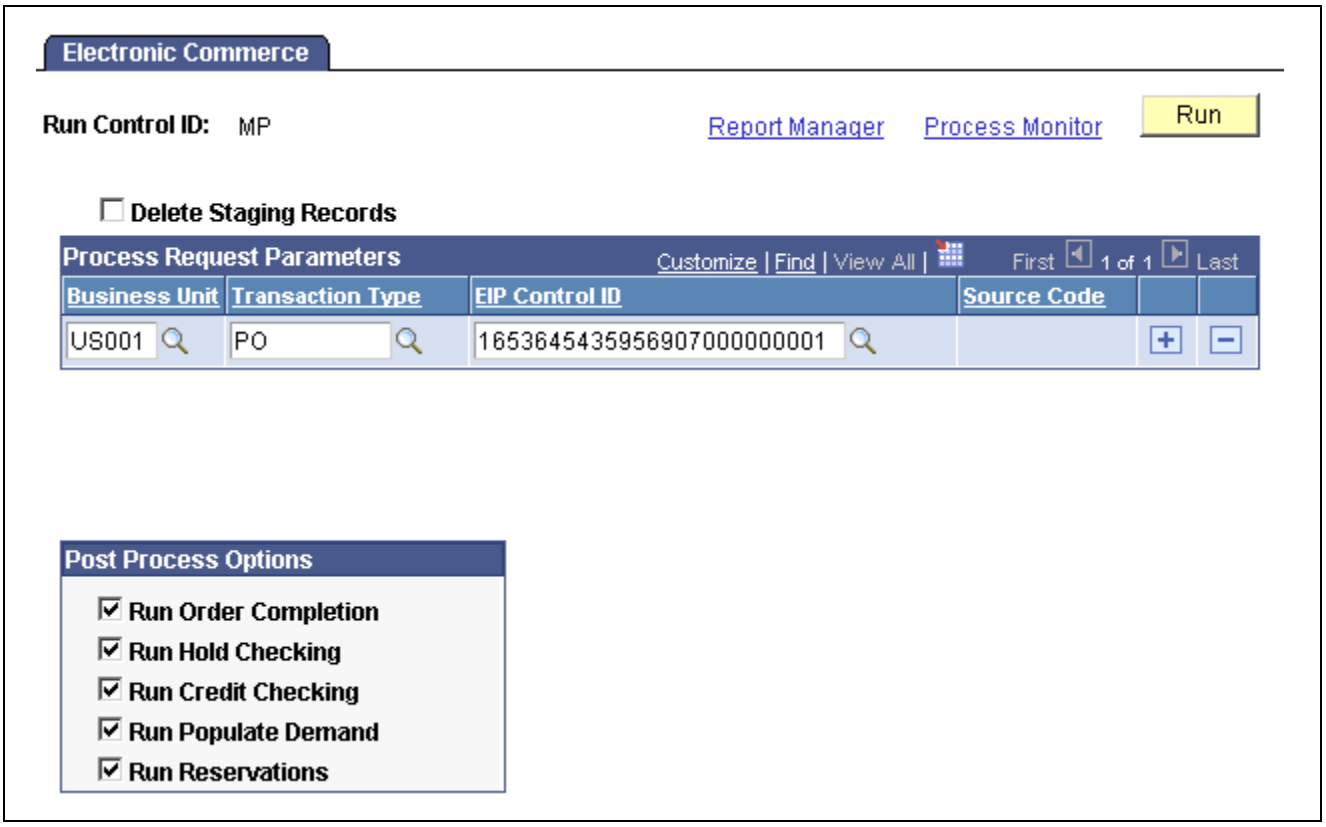

Electronic Commerce page

The Electronic Commerce process (OM_EC) is part of the overall inbound electronic commerce flow and is the process that takes sales orders that are loaded in the staging tables and validates the fields that are on the record to insure that the values are correct. The process performs these steps:

- Edits the data, such as customer numbers and units of measure, to ensure that they are valid.
- Converts the customer's product or item number to a PeopleSoft product identifier, when a PeopleSoft product identifier is not provided.
- Assigns PeopleSoft order numbers.
- Sets system defaults and status flags.
- Validates data changes to ensure that they are valid.
- Loads data into the production order tables (order staging data that is found to have errors is not loaded into the production tables until the errors are resolved).

See Also

PeopleSoft Enterprise Order Management 9.0 PeopleBook, "Using Sales Order and Quotation Enterprise Integration Points," Running Electronic Commerce for Inbound Sales Order and Quote EIPs

Correcting Errors

Access the Data Definition Maintenance page.

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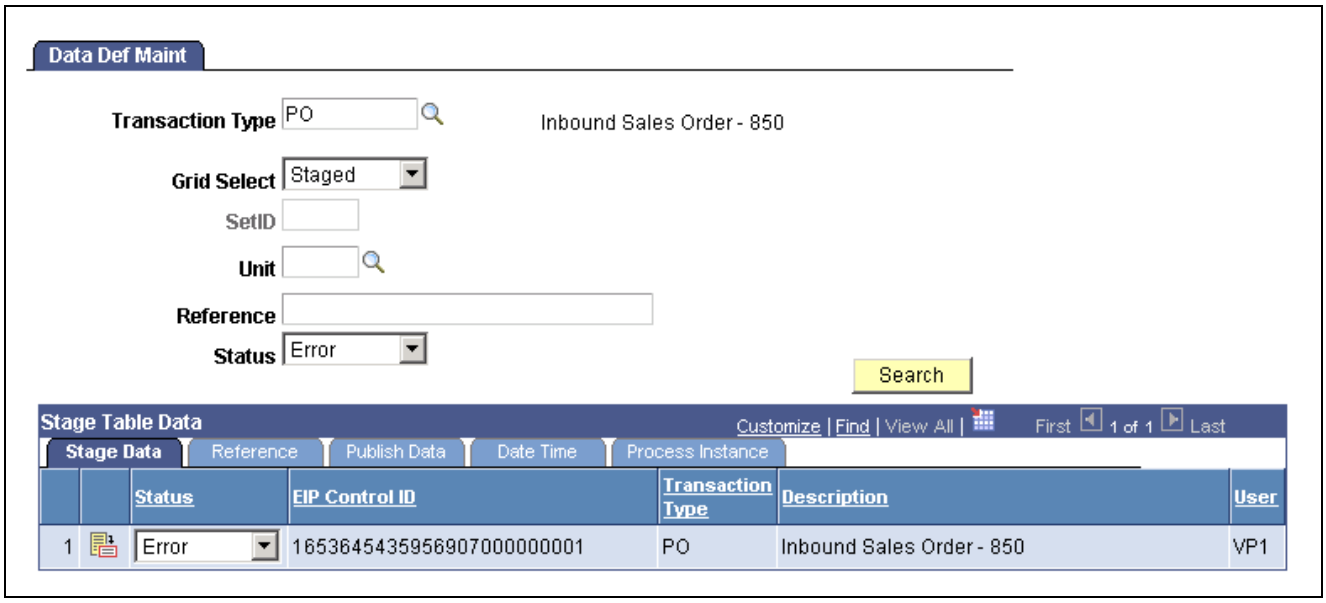
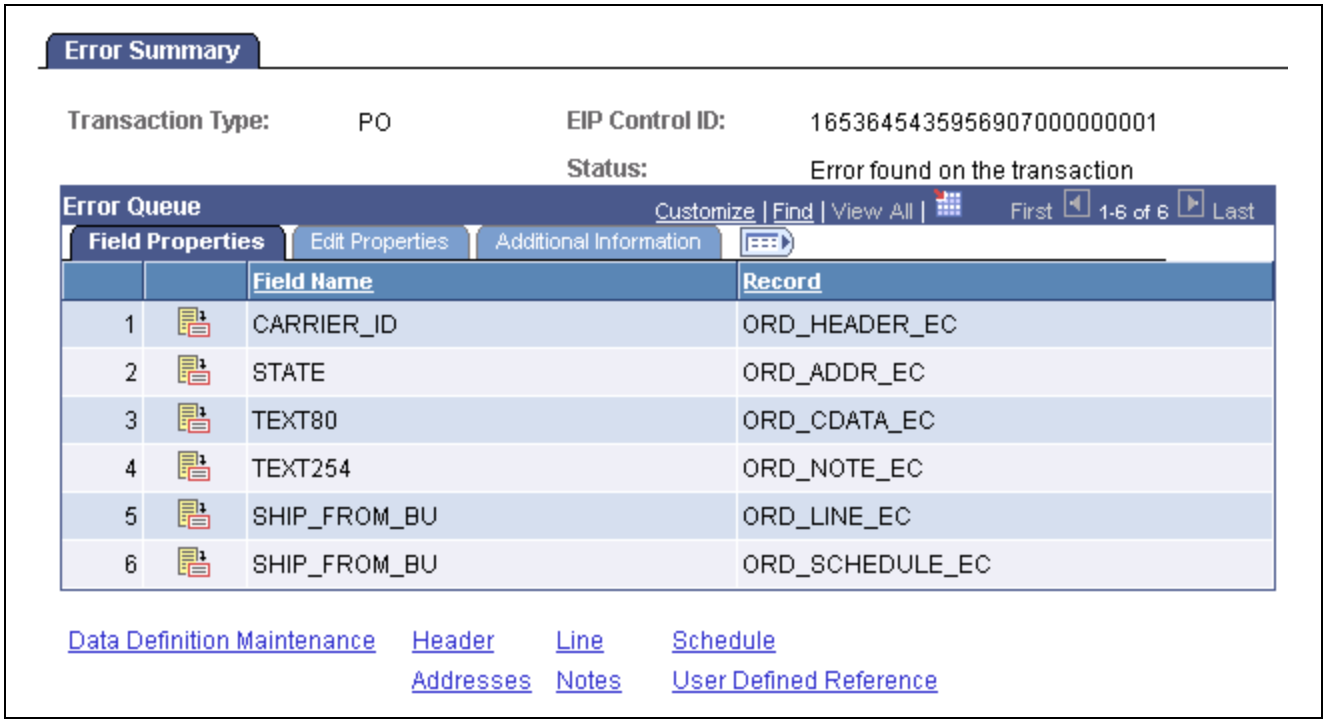


Data Definition Maintenance page

Use the Data Definition Maintenance page to view the status of the transaction. Select a Transaction Type of *PO*. Enter a business Unit. Click the Search button.

Click the Details icon to access the Error Summary page where you can view and correct errors.



Error Summary page

Navigate to the Header, Line, Schedule, Addresses, Notes, or User Defined References to fix errors.

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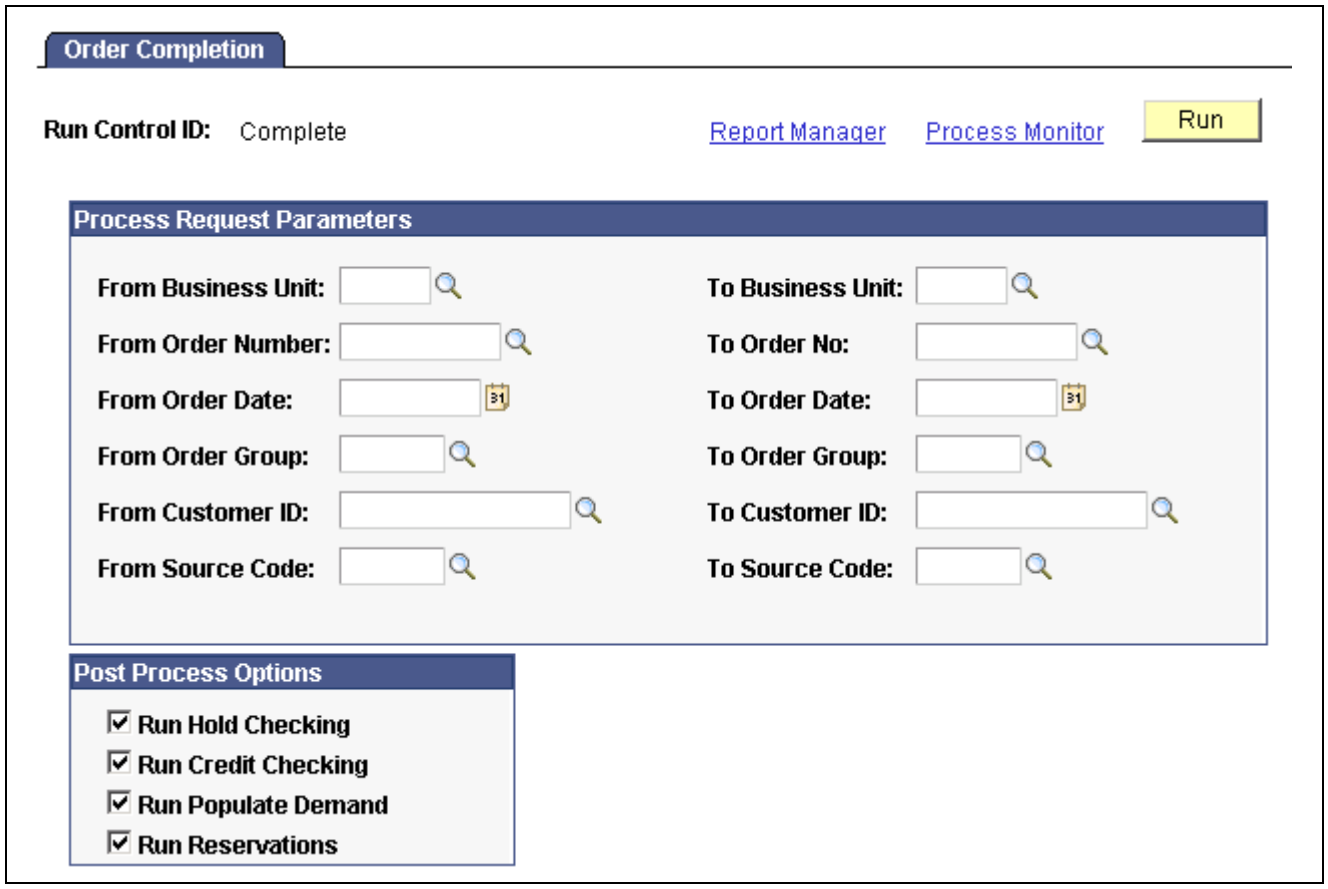
See Also

PeopleSoft Enterprise Order Management 9.0 PeopleBook, "Using Sales Order and Quotation Enterprise Integration Points"

Chapter 4, "Processing Enterprise Integration Points (EIPs)," Using Data Definition Maintenance, page 104

Completing the Orders

Access the Order Completion page.



Order Completion page

The Order Completion/Repricing process (OM_BACKGRND) completes processing for sales orders that are entered into PeopleSoft Order Management by several methods, including flat file and XML messages. Completing this process enables you to access the orders from the Order Entry Form component.

Enter the selection criteria, and click Run.

See Also

PeopleSoft Enterprise Order Management 9.0 PeopleBook, "Processing Sales Orders," Running Order Completion/Repricing

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Setting Up the Sales Order Acknowledgement EIP

This section discusses the Sales Order Acknowledgement EIP.

Understanding the Sales Order Acknowledgment EIP

The Sales Order Acknowledgement EIP is an asynchronous outbound service operation to send an acknowledgement to your customers that a sales order has been received. The data from this service operation is passed to a third-party system or to PeopleSoft CRM. The Sales Order Acknowledgement EIP meets EDI requirements of the X.12 855 transaction set.

Before you can send order acknowledgements with the Sales Order Acknowledgement EIP, you must:

Type of Setup	Steps
Complete application setup	Associate customers receiving sales order acknowledgements with an *ACKN* document code and a preferred communication value of *XML Only* or *XML and Print*. If PeopleSoft Order Management is installed, you set up these values on the Contact Additional Info page in the Maintain Contact component.
Complete Integration Broker setup	• Activate the SALES_ORDER_ ACKNOWLEDGEMENT service operation. • Verify the queue is in run mode. • Activate the handler. • Activate the routing. • Confirm the parameters of the routing definition. • Verify the node is active.
Complete Enterprise Component setup	• Activate the associated batch publish rule and specify the appropriate output for the message (an XML-based message or a flat file). If you are using message chunking, select a chunking rule ID. • If you are using message chunking, set up the chunking rule mapping definitions.

See Also

Chapter 3, “Implementing Integrations,” Setting Up Service Operations, page 83

Chapter 7, “Integrating With a Third-Party Point-of-Use Supplier System,” page 211

Chapter 8, “Integrating With a Third-Party Surgical Resource Software Application,” page 219

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Pages Used to Set Up the Sales Order Acknowledgement EIP

Page Name	Object Name	Navigation	Usage
Contact	CONTACT	Customers, Contact Information	Maintain information about each contact.
Contact Customer	CONTACT_CUST_PAGE	Click the Contact Customer Information link on the Contact page.	Indicate the primary ship to contact.
Contact Additional Info	CONTACT_ADDTL_INFO	Click the Additional Info link for a contact on the Contact Customer page.	Enter the preferred communication method for the selected document.
Service Operations-General	IB_SERVICE	PeopleTools, Integration Broker, Integration Setup, Service Operations, General	Define and activate a service operation.
Service Operations-Handlers	IB_SERVICEHDLR	PeopleTools, Integration Broker, Integration Setup, Service Operations, Handlers	Activate one or more service operation handlers.
Service Operations-Routings	IB_SERVICERTNGS	PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings	Define and activate routing definitions on the service operation.
Routings-Parameters	IB_ROUTINGDEFNDOC	• PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings. Select the link attached to the routing definition name, then select the Parameters tab. • PeopleTools, Integration Broker, Integration Setup, Routings, Parameters	Verify the external service alias name, nodes, and transform programs used by this routing.
Queue Definitions	IB_QUEUEDEFN	• PeopleTools, Integration Broker, Integration Setup, Service Operations, General. Select the Queue link attached to this service operation. • PeopleTools, Integration Broker, Integration Setup, Queues	Activate the queue used by the service operation.
Node Definitions	IB_NODE	PeopleTools, Integration Broker, Integration Setup, Nodes, Node Definitions	Activate node used by the service operation.
Nodes-Connectors	IB_NODECONN	PeopleTools, Integration Broker, Integration Setup, Nodes, Connectors	For an outbound service operation, verify the node is connected to the correct network.

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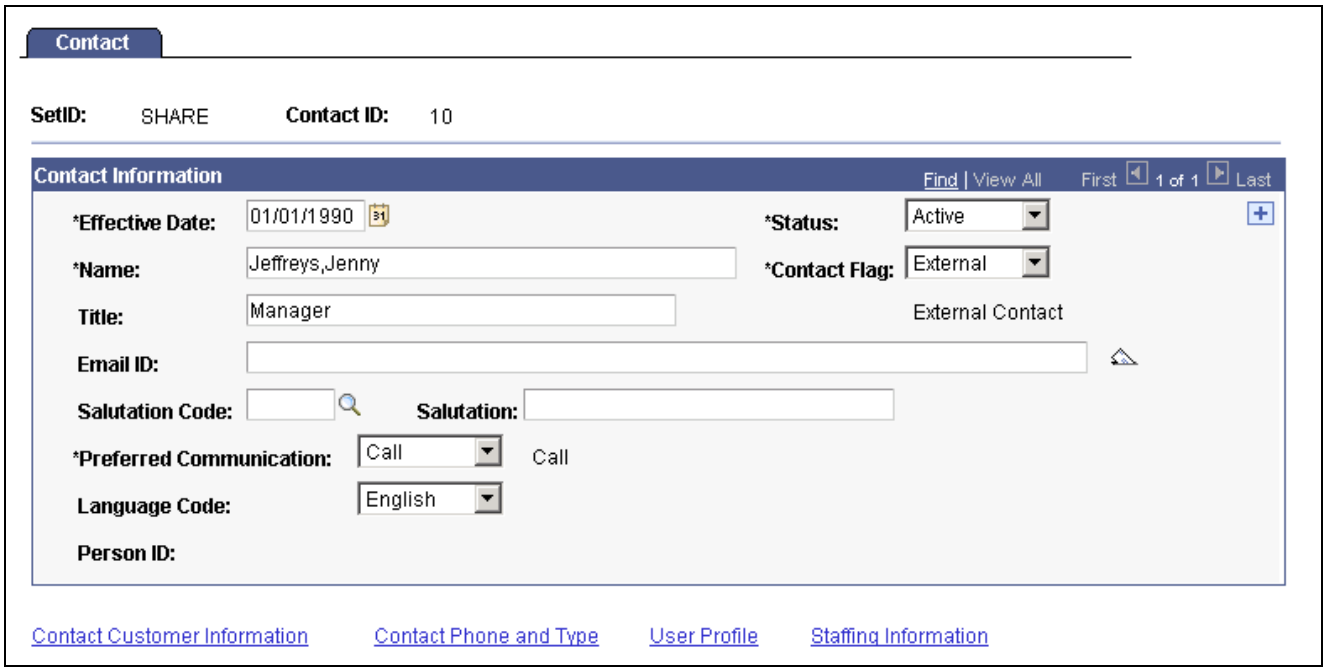
Page Name	Object Name	Navigation	Usage
Batch Publish Rules	EO_MSGPUBATCH	Enterprise Components, Integration Definitions, Batch Publish Rules	Set up publication rules. You must activate a publish rule for the publication messages you create to follow. This rule includes instructions on message chunking, if necessary.
Customer ID Chunk	OM_CHUNKCUSTID	SCM Integrations, Chunking Rule, CustID to Node Mapping	Set up chunking by customer for the batch publish rule.

Verifying Contacts

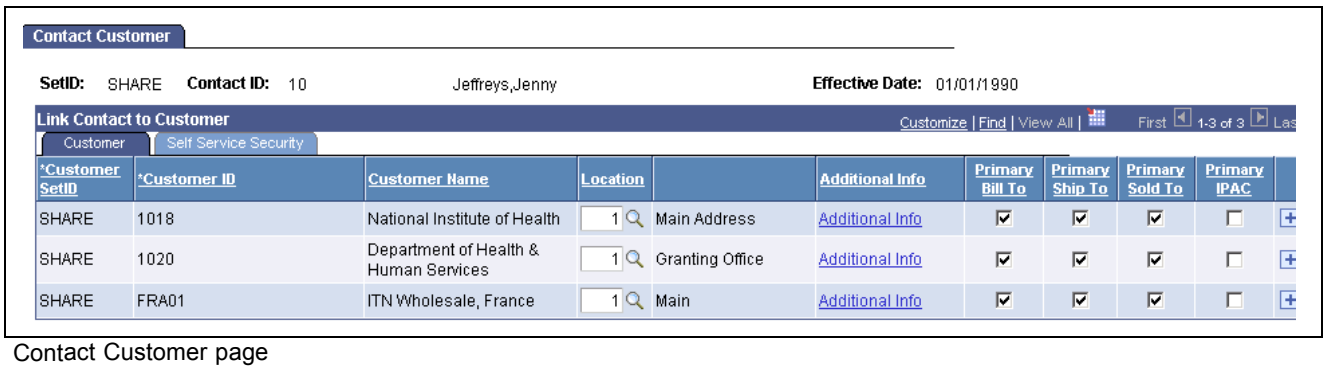
You must ensure that the customer you are interacting with has a contact set up to accept EDI transmissions, and that the contact is a ship to contact.

Access the Contact page using the Customer ID in the *correct history* mode.



Contact page

Access the Contact Customer page using the Contact Customer Information link on the Contact page.



Contact Customer page

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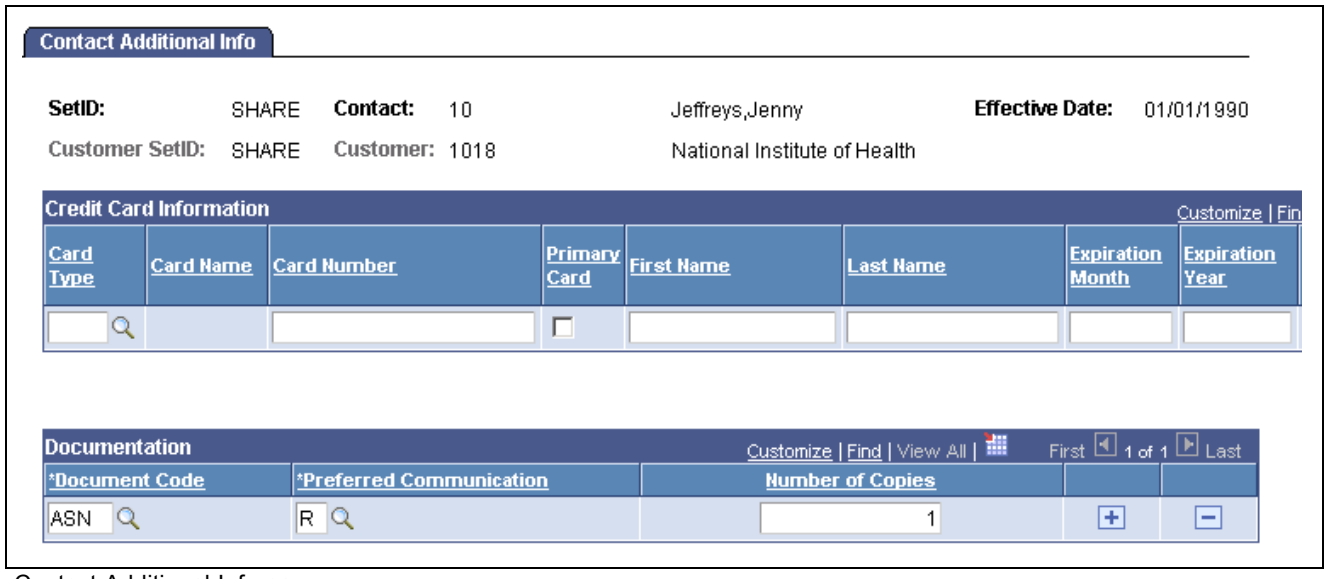
Select the Primary Ship To check box to receive the proper shipping notifications.

Click the Additional Info link corresponding to the appropriate customer to access the Contact Additional Info page.



Contact Additional Info page

Under the Documentation group box, make sure the Document Code is *ACKN* (order acknowledgement), and Preferred Communication is *R* (XML and Print) or *I* (XML only).

See Also

PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook, "Maintaining Contacts"

Activating the Sales Order Acknowledgement Service Operation

Use the PeopleSoft Integration Broker to activate the Sales Order Acknowledgement service operation.

Access the Service Operations-General page.

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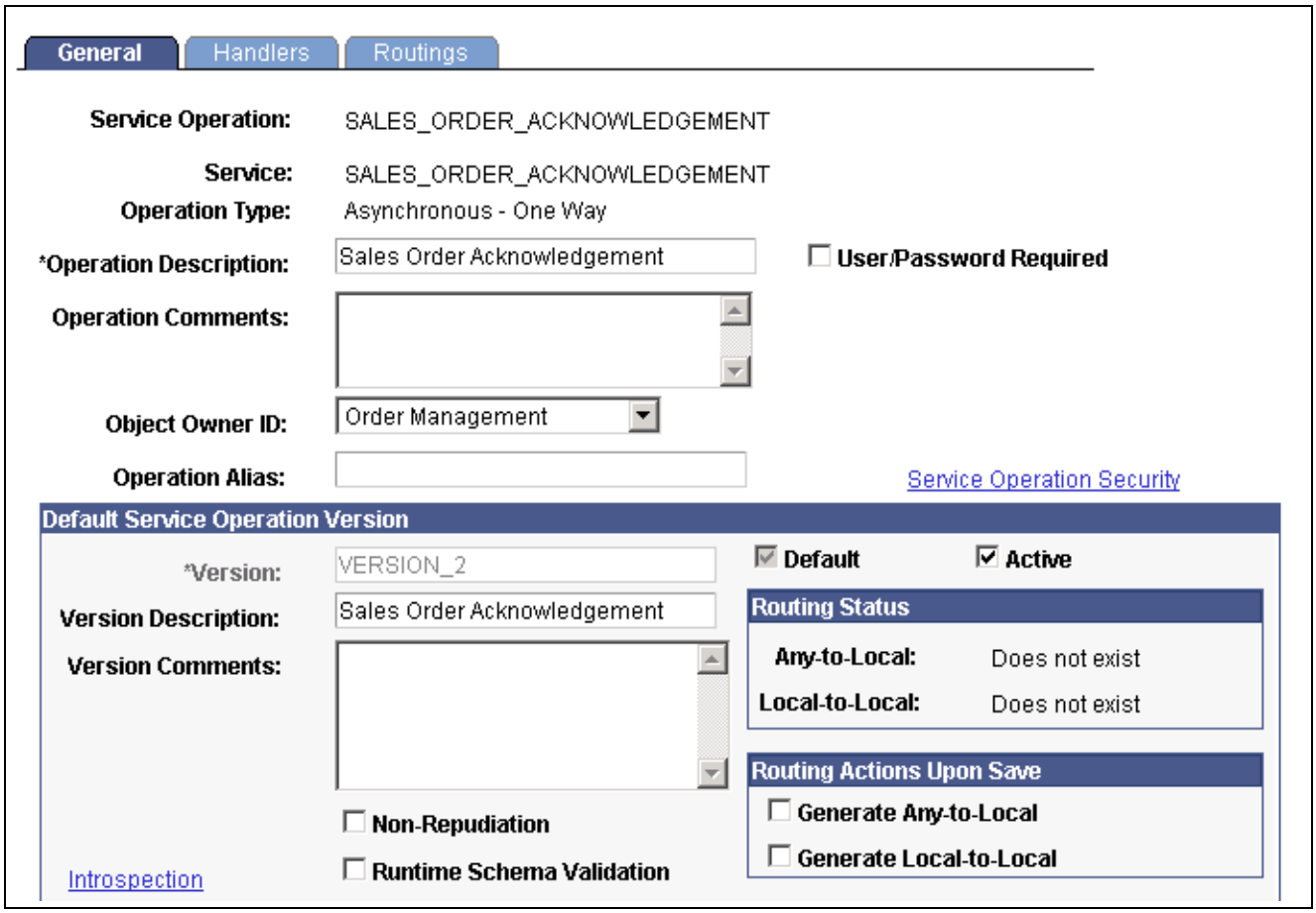
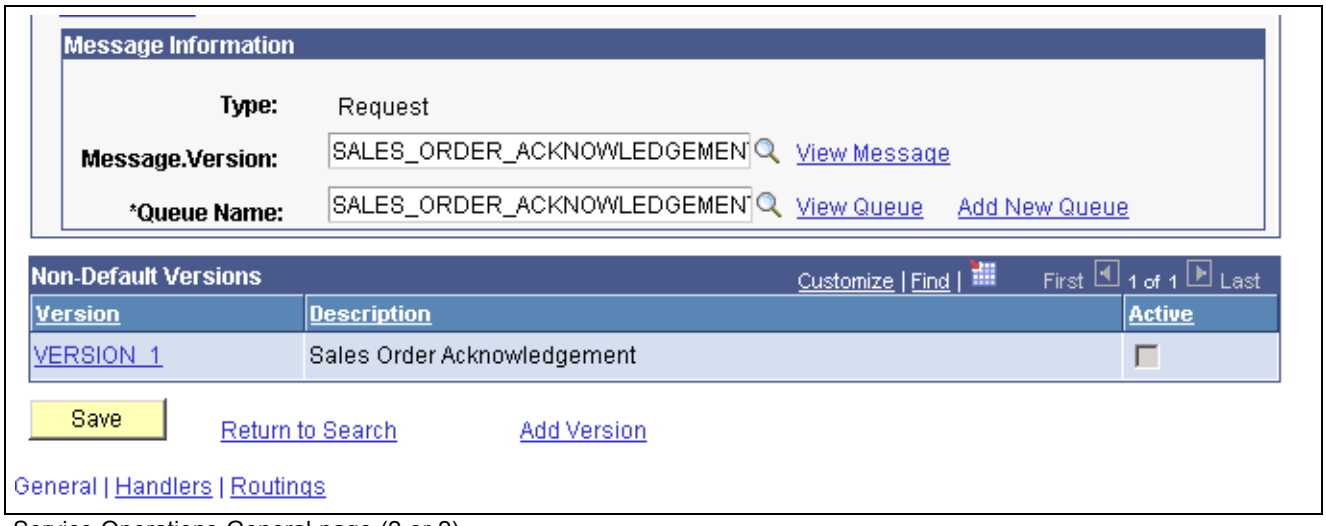


Service Operations-General page (1 or 2)



Service Operations-General page (2 or 2)

For the SALES_ORDER_ACKNOWLEDGEMENT service operation, select the Active check box for the applicable service operation version. If the desired version is not the default version for the service operation, the default version must also be activated.

On the General tab of the Service Operations component, select the View Queue link at the bottom of the page to access the Queue Definitions page.

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Service Operation Versions

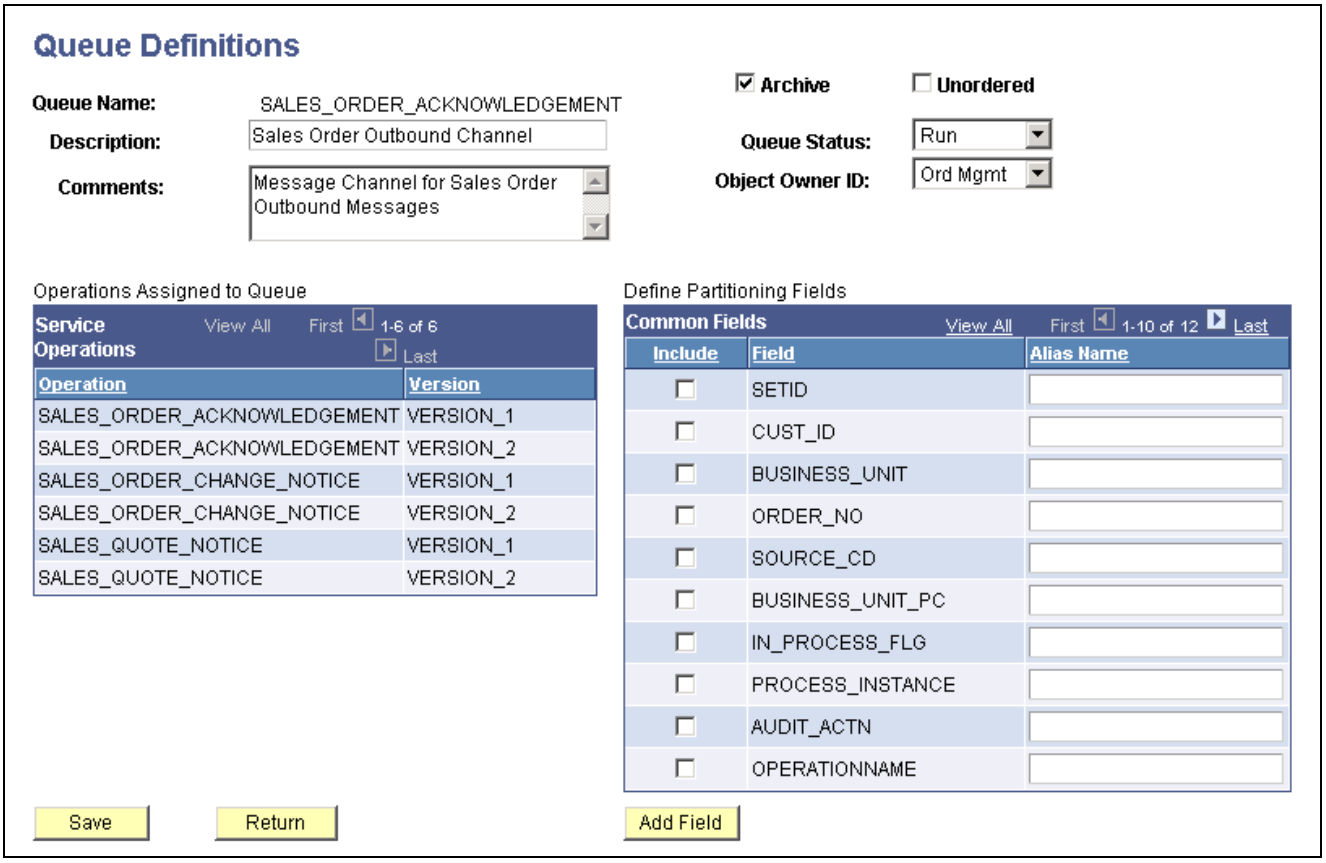
The Default Service Operation Version group box displays the most current version of this service operation. If there have been changes to the PeopleSoft application that have required the service operation to change, for example new fields or tables, then the Non-Default Versions group box displays any older versions of the service operation based on the older release of the PeopleSoft application. The default version is always the current version, however you can use a non-default version to communicate with third-party systems that want to receive the data based on an old version. Select the link in the Non-Default Versions box to access the Service Operation Version page. This page contains information about the non-default version, including message and queue. In addition, the Logical Transforms group box contains transforms to convert the data to or from the default version. A transform program is a type of PeopleSoft Application Engine program that can convert data from one format to another. Based on your environment, you will review and possibly change these transforms.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

Verifying the Queue is in Run Mode

Access the Queue Definitions page.



Queue Definitions page

For the SALES_ORDER_ACKNOWLEDGEMENT queue, verify the Queue Status field has a value of *Run.*

Click the Return button to go back to the Service Operations component.

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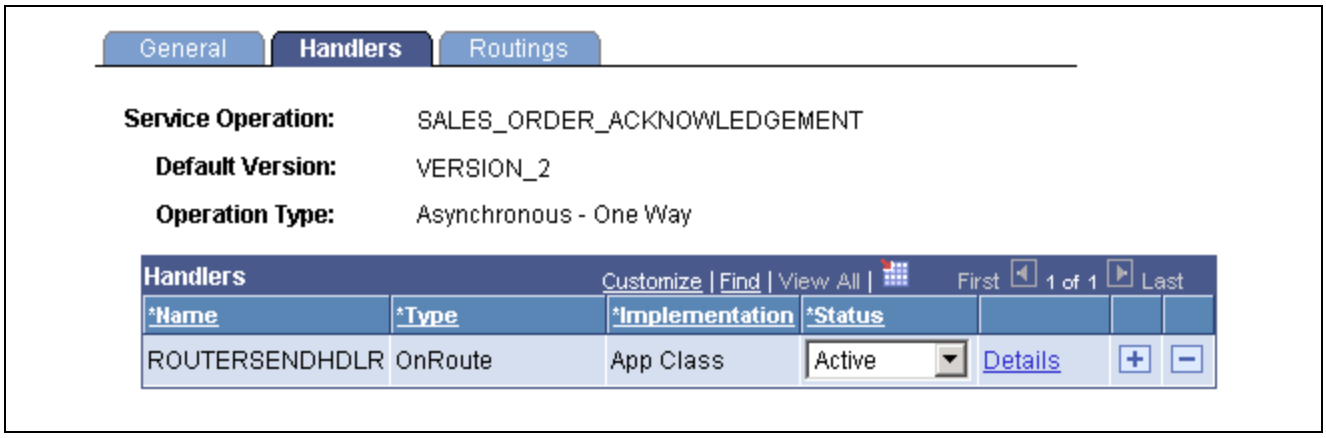
Activating the Handler

Access the Service Operations-Handlers page.

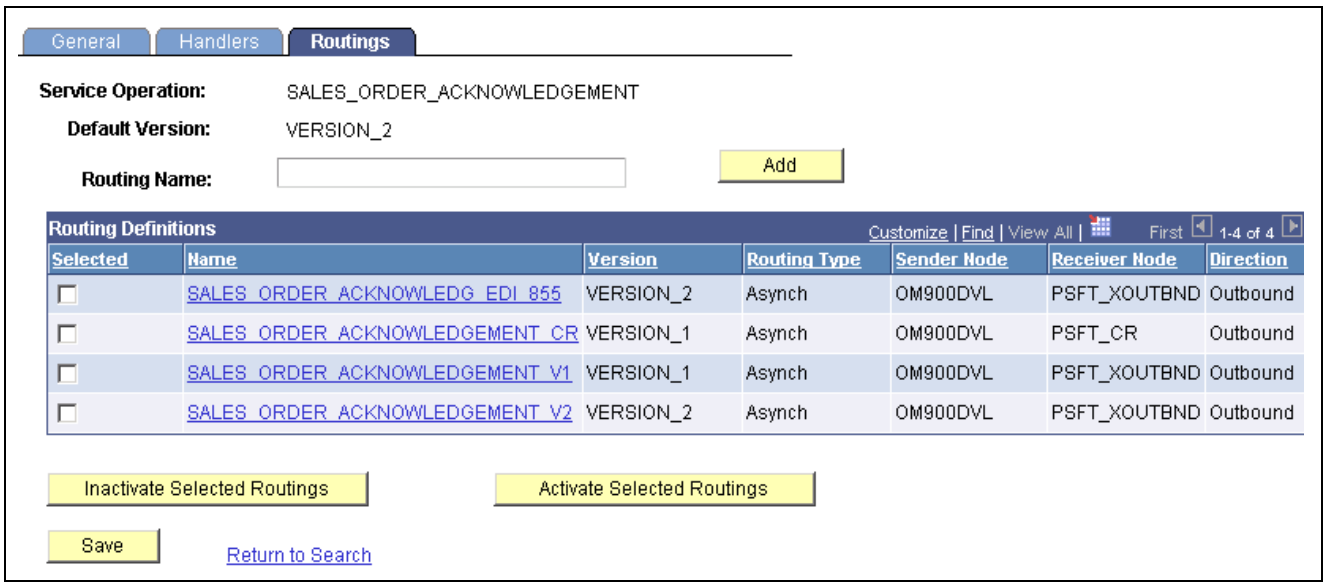


Service Operations-Handlers page

For the SALES_ORDER_ACKNOWLEDGEMENT service operation, click the Handlers tab of the Service Operations component. If you want to use chunking, select the value of *Active* in the Status field for the OnRoute handler.

Activating the Routings

Access the Service Operations-Routings page.



Service Operations-Routings page

For the SALES_ORDER_ACKNOWLEDGEMENT service operation, click the Routings tab of the Service Operations component. Activate an outbound routing definition for each receiver node and external alias name that data will be sent to. To activate a routing, select the check box next to the routing definition and click the Activate Selected Routings button. The following routing definitions are predefined:

- The SALES_ORDER_ACKNOWLEDG_EDI_855 routing definition sends outbound sales order acknowledgements using the EDI X.12 855 format as a flat file. The data is converted from the PeopleSoft standard XML format to the EDI X.12 855 transaction format and then from XML to a flat file. If you

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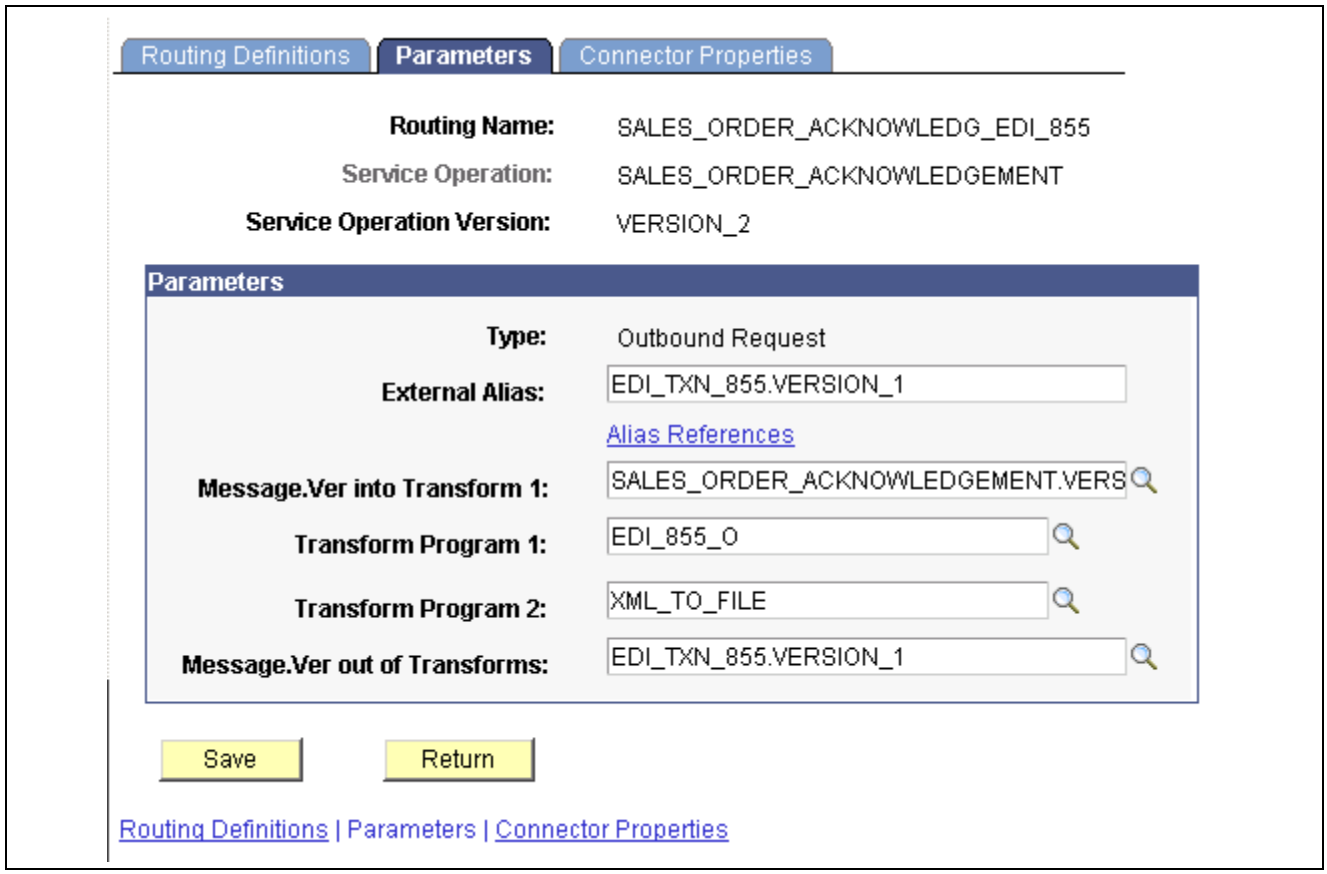
wish to send the data as an XML file using the EDI X.12 855 format, then alter the routing definition to remove the second transform program.

- The SALES_ORDER_ACKNOWLEDGEMENT_CR routing definition sends outbound sales order acknowledgements using the PeopleSoft standard XML format to PeopleSoft CRM.
- The SALES_ORDER_ACKNOWLEDGEMENT_V1 routing definition sends outbound sales order acknowledgements using the PeopleSoft standard XML format and converts the data from the current service operation version (version 2) to an older version (version 1) of the service operation. This routing definition is used when you are sending data to a third-party system that is still using an older version of the service operation.
- The SALES_ORDER_ACKNOWLEDGEMENT_V2 routing definition sends outbound sales order acknowledgements using the PeopleSoft standard XML format. This routing definition is used when you are sending data to a third-party system that is using the current version of the service operation.

Note. You do not need to select a routing definition if the batch publish rule is set up to post to a flat file only.

Confirming the Parameters of the Routing Definition

Access the Routings-Parameters page.



Routings-Parameters page

On the Routings tab of the Service Operations component, select the link attached to the routing definition name. This link accesses the Routing Definitions component. Select the Parameters tab and complete the following steps:

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1. Confirm the external alias name in the External Alias field for the routing is correct. When sending or receiving data, the Integration Broker determines which routing to use by referring to the external alias name, not the routing name.
2. Verify or change the transform programs on this routing definition. A routing definition defines the sending and receiving nodes for a transaction and specifies any inbound and outbound transformations to invoke. A transform program is a type of PeopleSoft Application Engine program that can convert data from one format to another; for example, from XML to a flat file. Use a transform program when one node sends a request or response message with a data structure different from the structure required by the other node. You must decide, based on your environment, to change, remove, or add transform programs. The SALES_ORDER_ACKNOWLEDG_EDI_855 routing definition is delivered with two transform programs. The EDI_855_O transform program converts outbound sales order acknowledgements from the standard PeopleSoft XML format to the EDI X.12 855 transaction format (still in XML). The XML_TO_FILE transform program converts the EDI X.12 855 formatted data from XML to a flat file format. You can remove the XML_TO_FILE transform program to send your data in the XML EDI X.12 855 format. If you are not using EDI then you will want to use the SALES_ORDER_ACKNOWLEDGEMENT_V2 routing definition instead.

   The transform program, to convert data from the current version of a service operation to an older version, is located on the Service Operation Version page of the non-default version. Select the non-default version on the Service Operations-General page to access the Service Operation Version page.

Verifying the Node is Active

Access the Node Definitions page.

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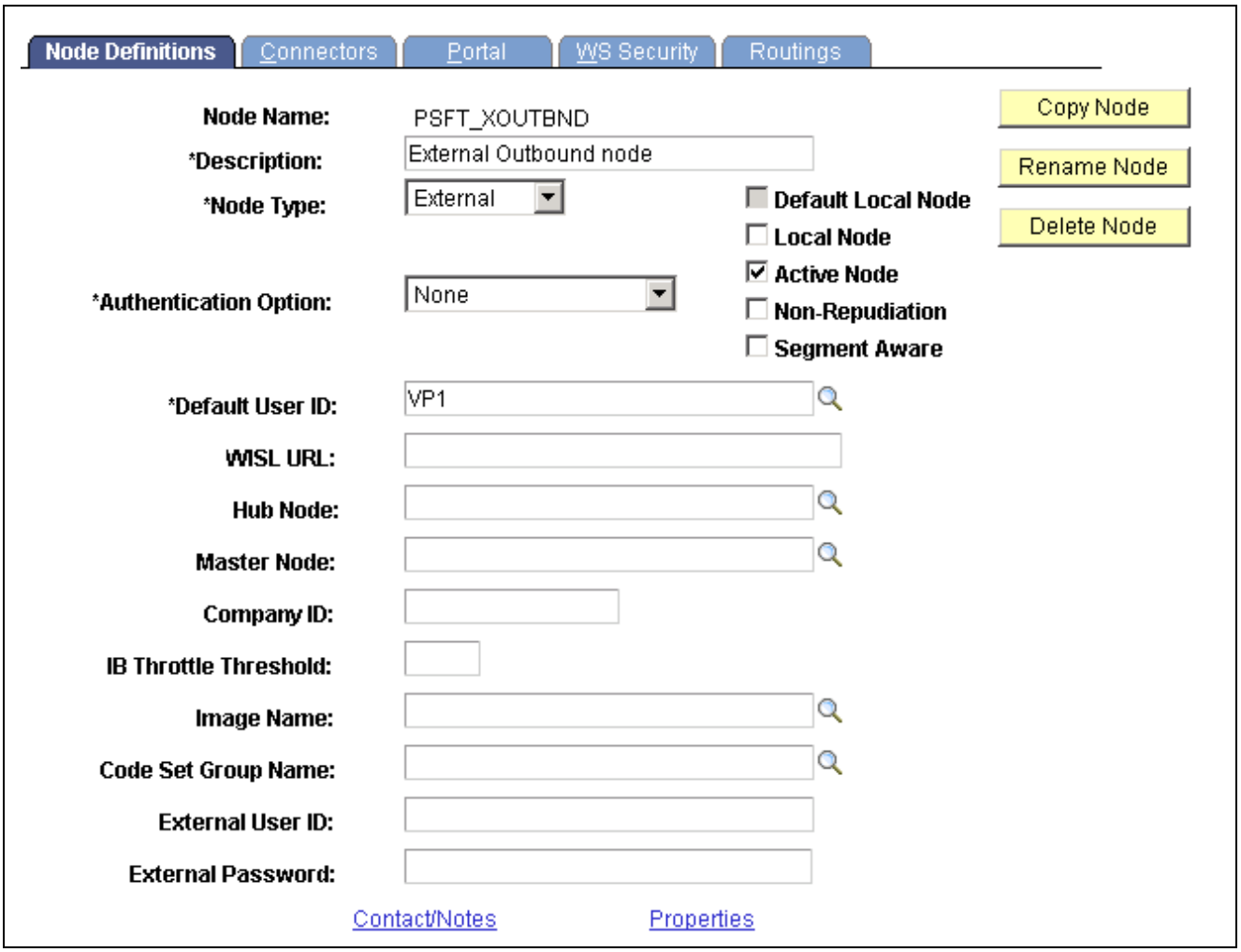

Node Definitions page

Verify the Active Node check box has been selected for any nodes used in the routings that you activated on the Service Operations-Routings page for SALES_ORDER_ACKNOWLEDGEMENT service operation.

Verifying the Node is Connected to the Network

Access the Nodes-Connectors page.

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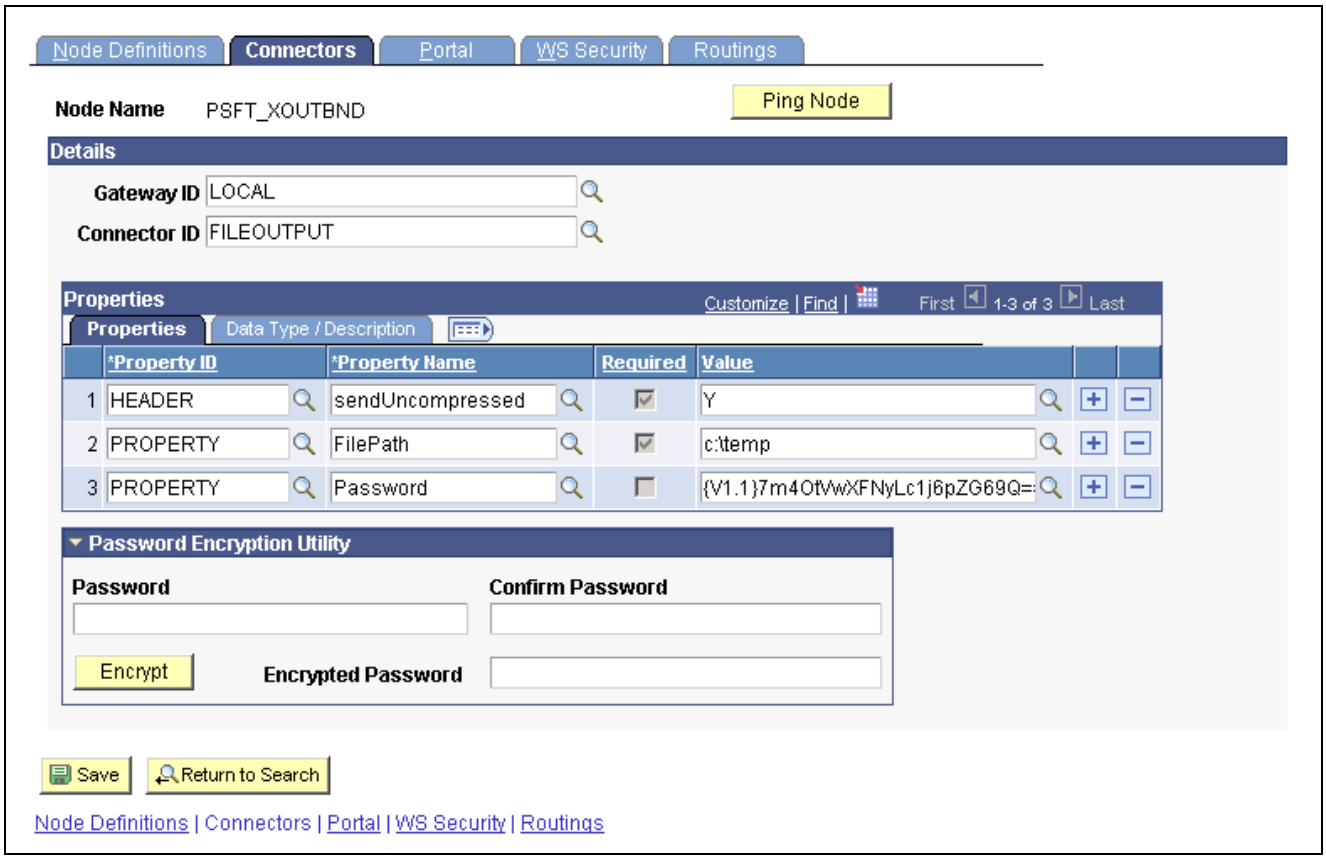

Nodes-Connectors page

For an outbound service operation, verify the node or routing is connected to the correct network using the Gateway ID and Connector ID fields. Depending on the file output location, you may need a password. If a password is needed, you should use the password encryption utility on this page.

Note. Your database administrator will need to assist you with this setup.

Activate the Batch Publish Rule

Access the Batch Publish Rules page.

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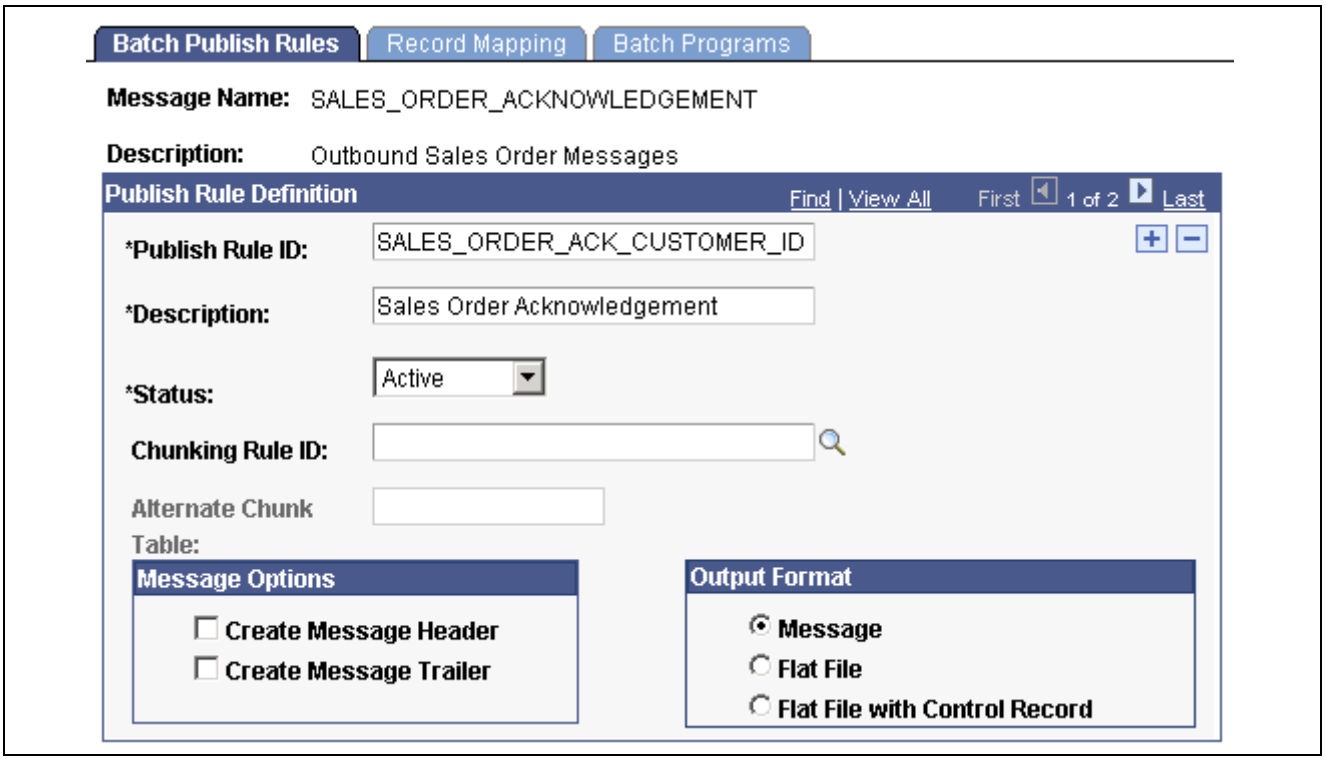

Batch Publish Rules page

For the SALES_ORDER_ACKNOWLEDGEMENT message name (service operation):

1. Select *Active* Status to activate this publish rule definition.
2. Select the appropriate Output Format. The PeopleSoft Application Engine program can create either an Extensible Markup Language (XML) message that flows through PeopleSoft Integration Broker architecture or a flat file generated on the PeopleSoft Process Scheduler server and not published elsewhere.
3. If you want to use message chunking, configure a chunking rule and then enter it in the Chunking Rule ID field.

See Also

PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook, "Assigning Publishing Rules"

Setting Up Chunking for the Batch Publish Rule

Access the Customer ID Chunk page.

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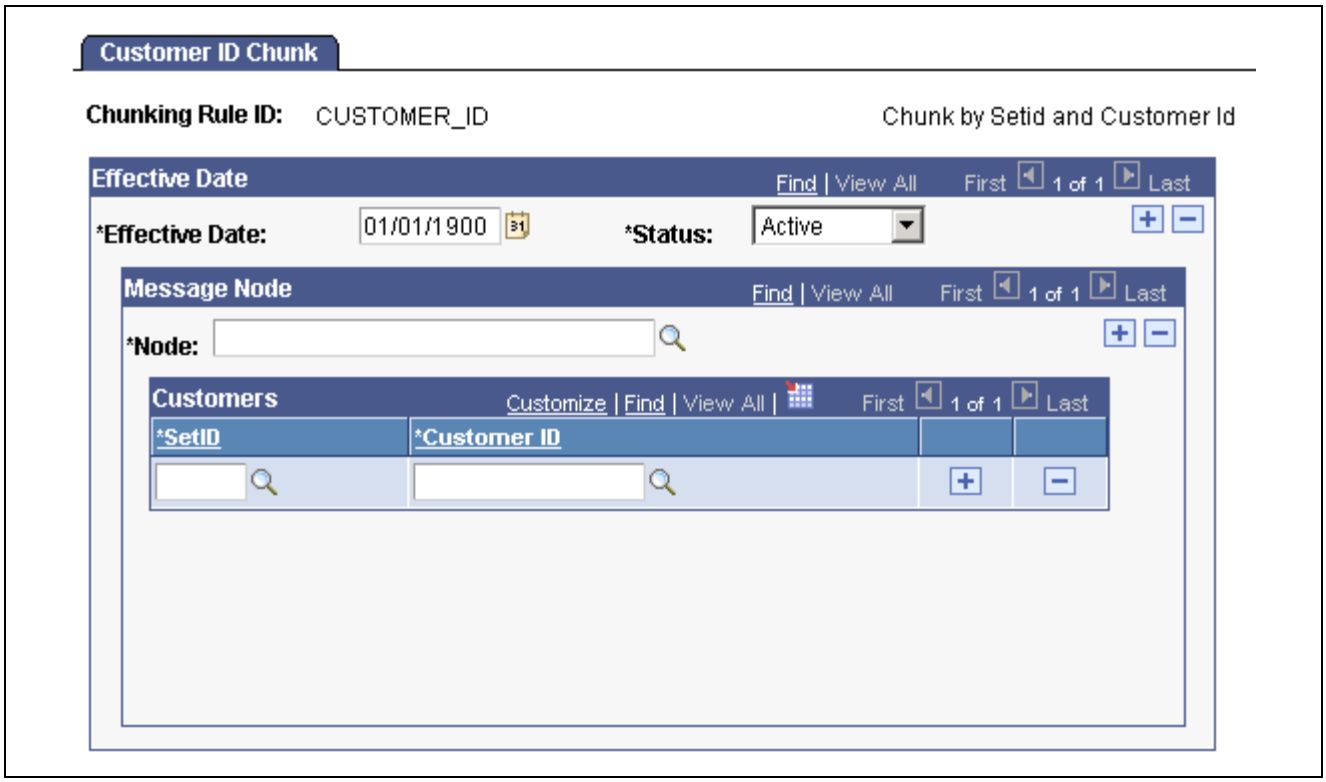

Customer ID Chunk page

If using chunking for the batch publish rule, set up the chunking rule mapping definitions. You can use a delivered chunking rule or create a new chunking rule.

If using the CUSTOMER_ID chunking rule ID, access the Customer ID Chunk page.

Select the node for each customer that receives electronic data.

Chunking is only needed if you have requirements to break up the outbound data and send them to different destinations based on attributes in the message such as business unit or customer ID. For example, use chunking to send a single customer's messages to a specific node setup for that trading partner. If you are using a middleware product to actually determine trading partner destinations then a single transaction with all trading partner transactions can usually be sent directly to the middleware product. You would not need to activate message chunking in this situation.

See Also

Chapter 3, "Implementing Integrations," Setting Up Chunking, page 88

Processing the Sales Order Acknowledgement EIP

This section discusses processing the Sales Order Acknowledgement EIP.

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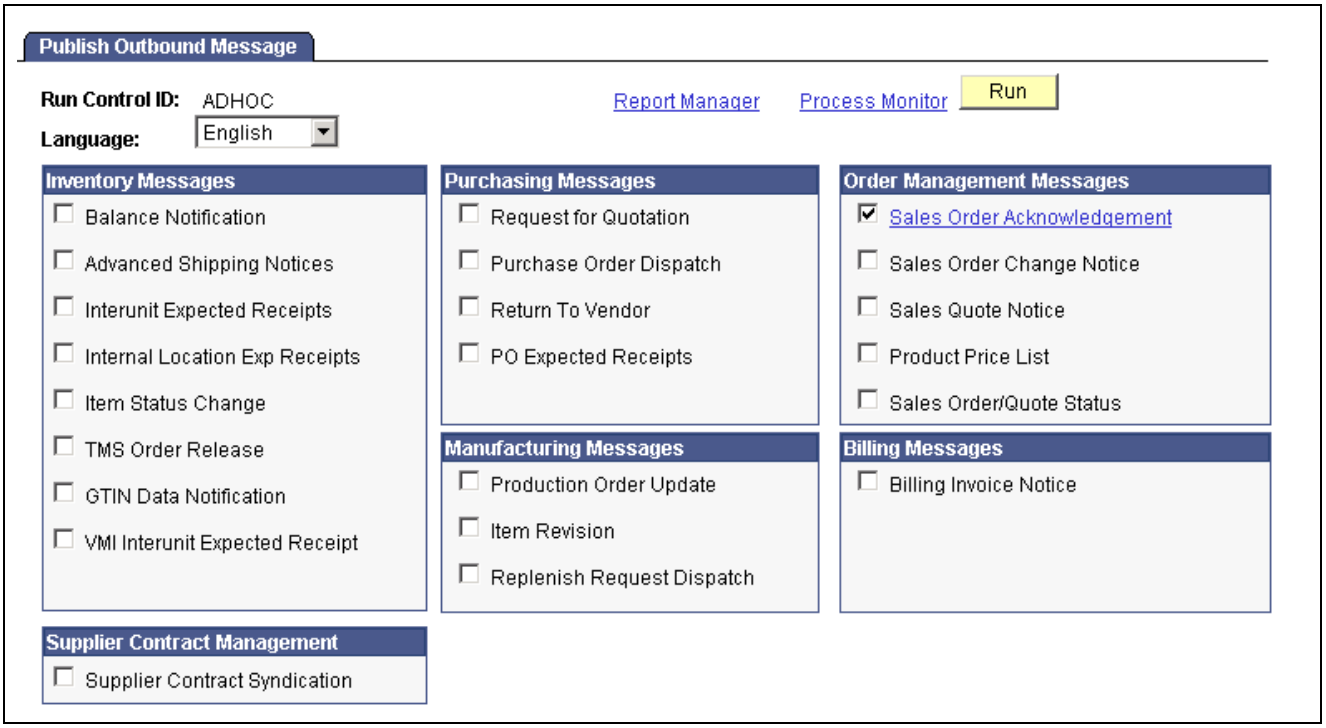
Pages Used to Process the Sales Order Acknowledgement EIPs

Page Name	Object Name	Navigation	Usage
Publish Outbound Message	IN_RUN_PUB_MSG	SCM Integrations, Publish Outbound Message	Initiate the outbound message publish process for outbound SCM messages that use the batch publish design pattern.
Order Acknowledgement Message Selection Criteria	OM_RUN_OUTBOUND_EC	Select the Sales Order Acknowledgement check box on the page to enable its link. Click the link to launch the PO Sales Order Acknowledgement page.	Enter processing options for the Sales Order Acknowledgement outbound messages. You can select processing options for only one message at a time.

Publishing Outbound Sales Order Acknowledgement Messages

Access the Publish Outbound Message page.



Publish Outbound Message page

Click the Sales Order Acknowledgement check box, and click the Sales Order Acknowledgement link to access the Order Acknowledgement Message Selection Criteria page.

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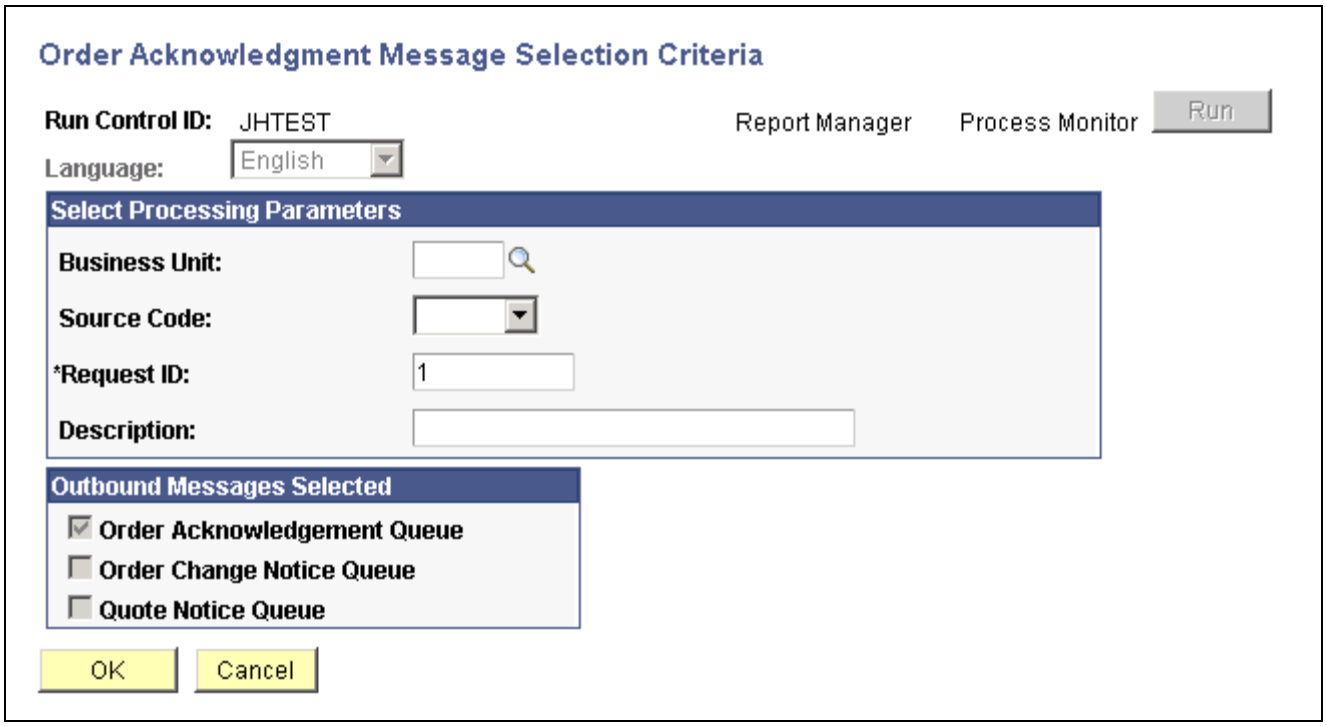

Order Acknowledgement Message Selection Criteria page

See Also

http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

Setting Up the Purchase Order Dispatch EIP

This section discusses setting up the Purchase Order Dispatch EIP.

Understanding the Purchase Order Dispatch EIP

The Purchase Order Dispatch EIP is an outbound asynchronous service operation to send purchase orders and purchase order change requests (change orders) to vendors. If enabled, the system generates a Purchase Order Dispatch EIP transaction when you run the Publish Outbound Message process. This message also supports flat-file processing. You can specify whether to send purchase orders based on business unit or vendor.

Before you can publish messages with the Purchase Order Dispatch EIP, you must:

Types of Setup	Steps
Complete application setup	On the purchase order, specify EDX as the PO dispatch method.

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Types of Setup	Steps
Complete Integration Broker setup	• Activate the PURCHASE_ORDER_DISPATCH service operation. • Verify the queue is in run mode. • Activate the handler. • Activate the routing. • Confirm the parameters of the routing definition. • Verify the node is active.
Complete Enterprise Component setup	• Activate the associated batch publish rule and specify the appropriate output for the message (an XML-based message or a flat file). If you are using message chunking, select a chunking rule ID. • If you are using message chunking, set up the chunking rule mapping definitions.

Pages Used to Set Up the Purchase Order Dispatch EIP

Page Name	Object Name	Navigation	Usage
PO Header Details	PO_HDR_DTL	Purchasing, Purchase Orders, Add/Update POs. Click the Header Details link on the Purchase Order page.	Enter or change PO header information online.
Service Operations-General	IB_SERVICE	PeopleTools, Integration Broker, Integration Setup, Service Operations, General	Define and activate a service operation.
Service Operations-Handlers	IB_SERVICEHDLR	PeopleTools, Integration Broker, Integration Setup, Service Operations, Handlers	Activate one or more service operation handlers.
Service Operations-Routings	IB_SERVICERTNGS	PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings	Define and activate routing definitions on the service operation.
Routings-Parameters	IB_ROUTINGDEFNDOC	• PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings. Select the link attached to the routing definition name, then select the Parameters tab. • PeopleTools, Integration Broker, Integration Setup, Routings, Parameters	Verify the external service alias name, nodes, and transform programs used by this routing.

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Page Name	Object Name	Navigation	Usage
Queue Definitions	IB_QUEUEDEFN	• PeopleTools, Integration Broker, Integration Setup, Service Operations, General. Select the Queue link attached to this service operation. • PeopleTools, Integration Broker, Integration Setup, Queues	Activate the queue used by the service operation.
Node Definitions	IB_NODE	PeopleTools, Integration Broker, Integration Setup, Nodes, Node Definitions	Activate node used by the service operation.
Nodes-Connectors	IB_NODECONN	PeopleTools, Integration Broker, Integration Setup, Nodes, Connectors	For an outbound service operation, verify the node is connected to the correct network.
Batch Publish Rules	EO_MSGPUBATCH	Enterprise Components, Integration Definitions, Batch Publish Rules	Set up publication rules. You must activate a publish rule for the publication messages you create to follow. This rule includes instructions on message chunking, if necessary.
Setup Vendor to Node	PO_CHUNK_VENDOR	SCM Integrations, Chunking Rule, Manage ChunkRule Vendor ID Map	Set up chunking for the batch publish rule.

Setting the Purchase Order Dispatch Method

Access the PO Header Details page.

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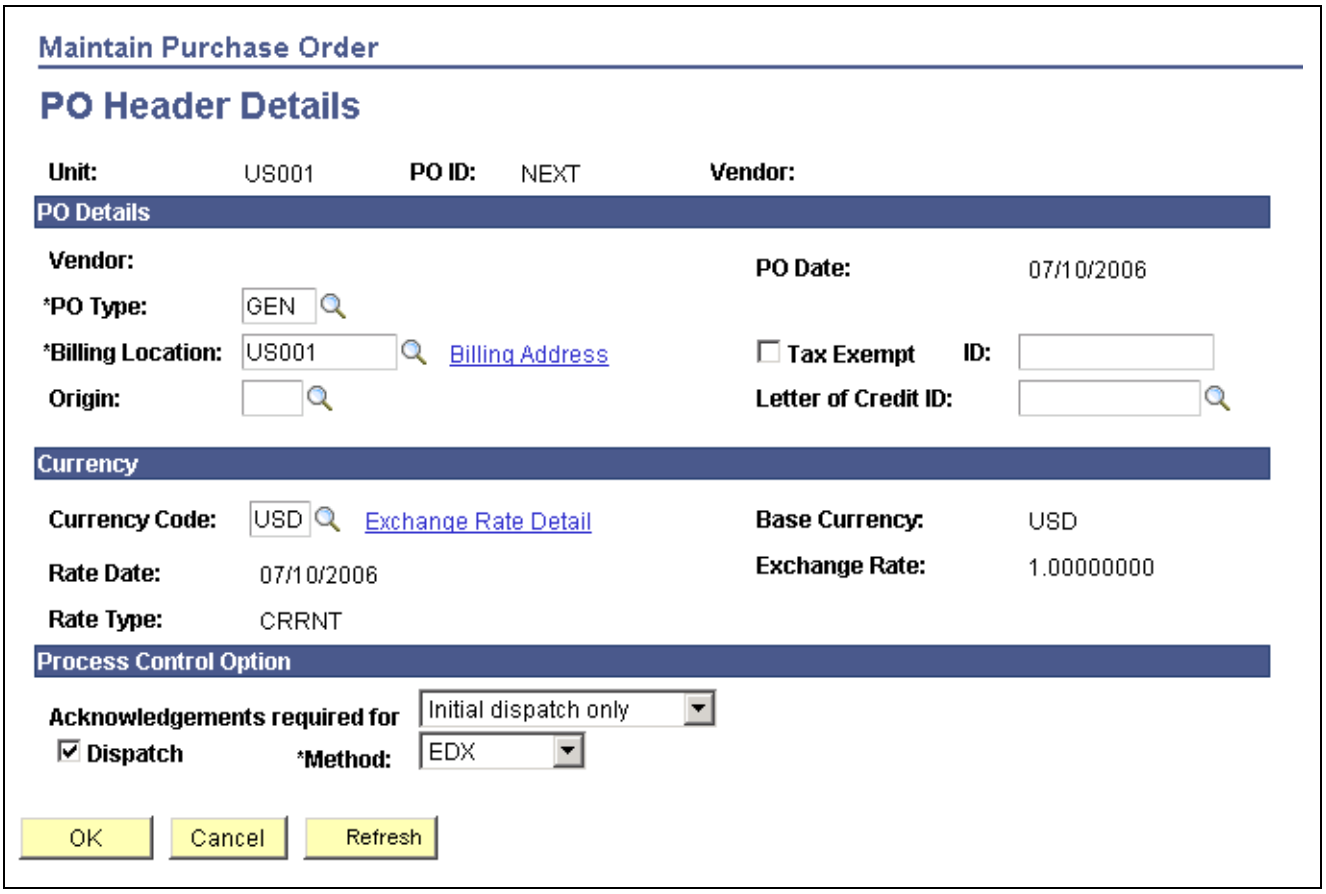

PO Header Details page

Select the Dispatch check box to ensure that the system dispatches the PO. Also, select a dispatch Method of *EDX*.

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Creating Purchase Orders Online"

Activating the Purchase Order Dispatch Service Operation

Use the PeopleSoft Integration Broker to activate the Purchase Order Dispatch service operation.

Access the Service Operations-General page.

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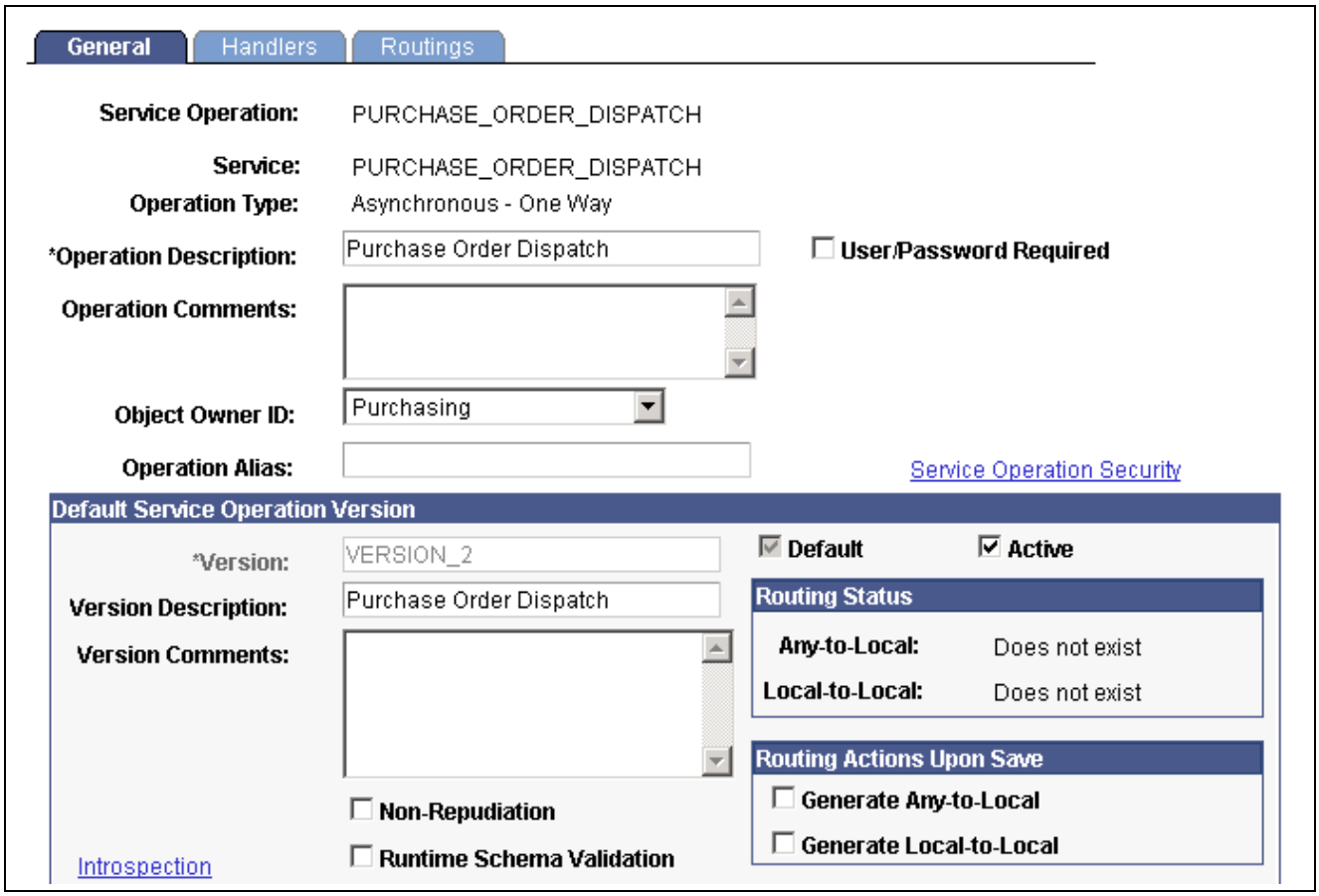
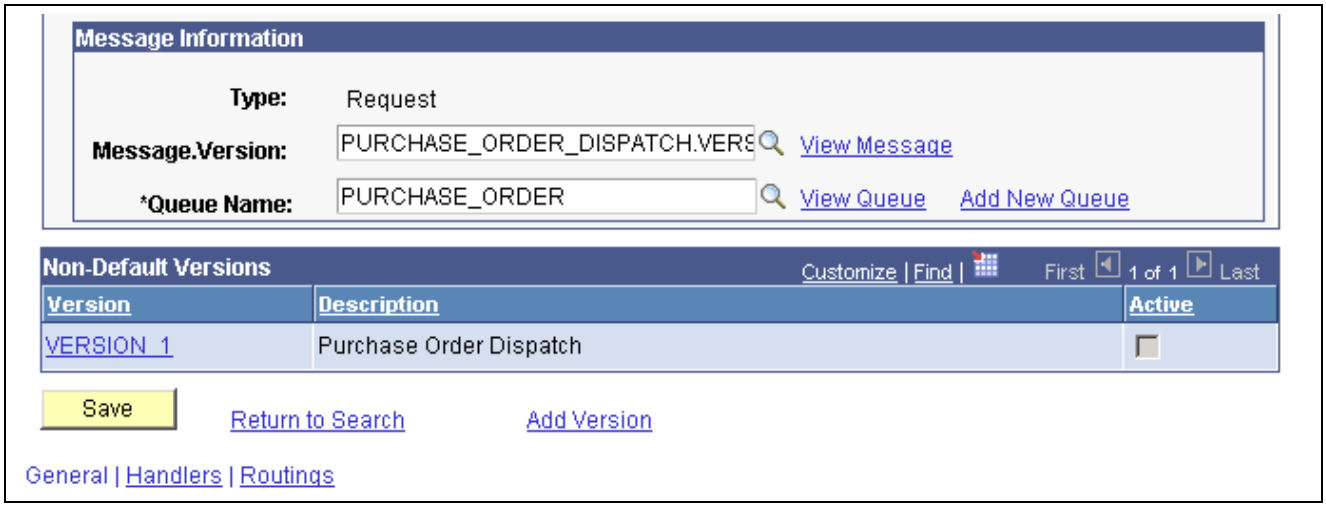


Service Operations-General page (1 or 2)



Service Operations-General page (2 or 2)

For the PURCHASE_ORDER_DISPATCH service operation, select the Active check box for the applicable service operation version. If the desired version is not the default version for the service operation, the default version must also be activated.

On the General tab of the Service Operations component, select the View Queue link at the bottom of the page to access the Queue Definitions page.

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Service Operation Versions

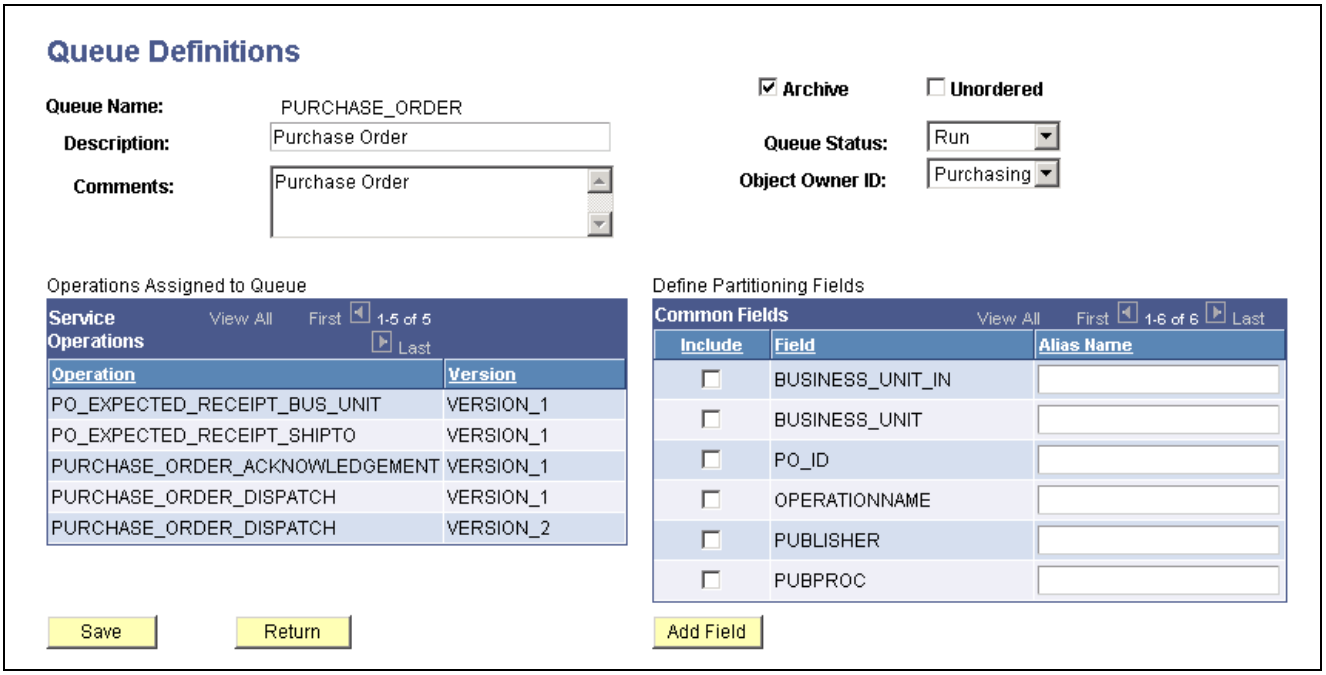
The Default Service Operation Version group box displays the most current version of this service operation. If there have been changes to the PeopleSoft application that have required the service operation to change, for example new fields or tables, then the Non-Default Versions group box displays any older versions of the service operation based on the older release of the PeopleSoft application. The default version is always the current version, however you can use a non-default version to communicate with third-party systems that want to receive the data based on an old version. Select the link in the Non-Default Versions box to access the Service Operation Version page. This page contains information about the non-default version, including message and queue. In addition, the Logical Transforms group box contains transforms to convert the data to or from the default version. A transform program is a type of PeopleSoft Application Engine program that can convert data from one format to another. Based on your environment, you will review and possibly change these transforms.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

Verifying the Queue is in Run Mode

Access the Queue Definitions page.



Queue Definitions page

For the PURCHASE_ORDER queue, verify the Queue Status field has a value of *Run.*

Click the Return button to go back to the Service Operations component.

Activating the Handler

Access the Service Operations-Handlers page.

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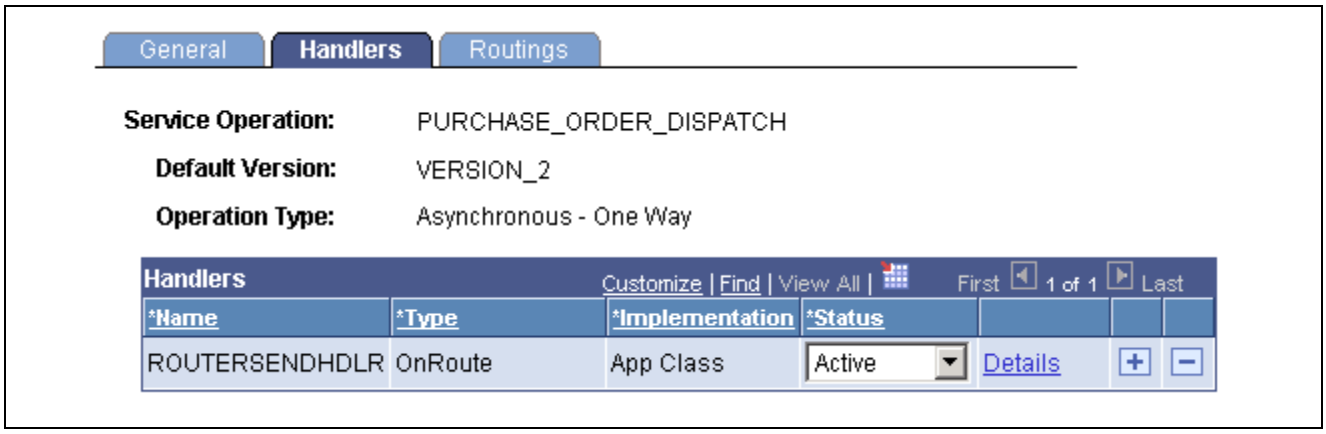
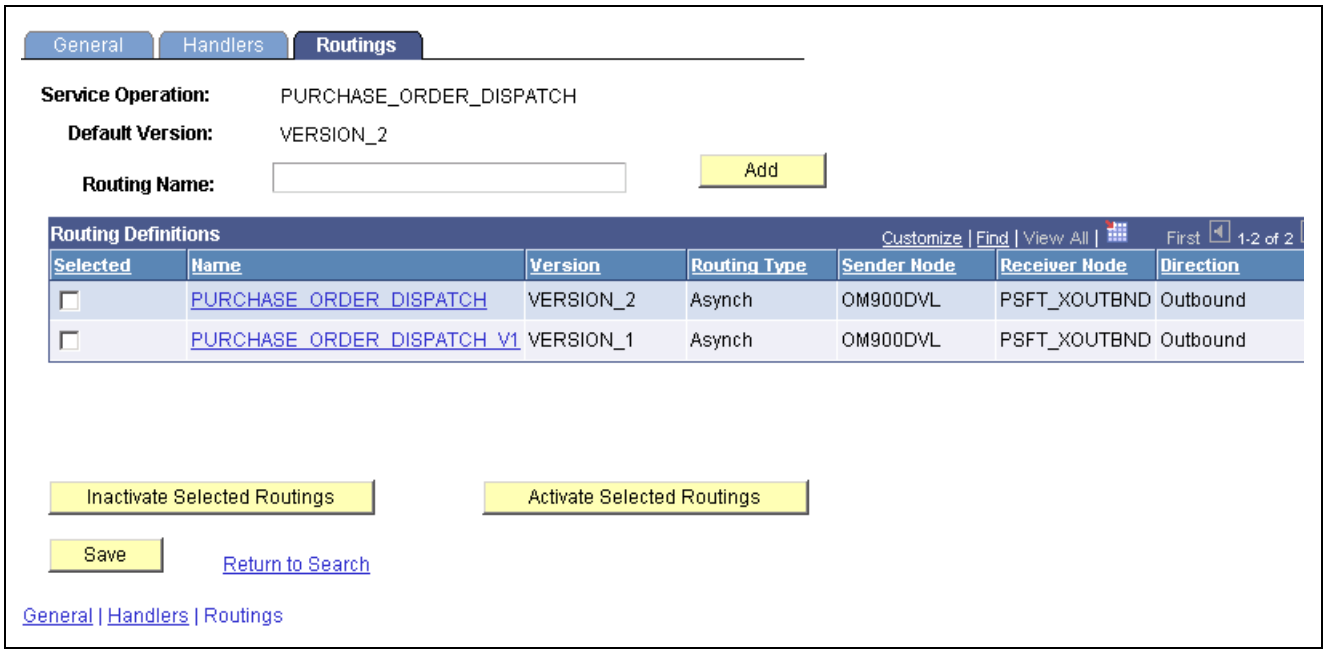


Service Operations-Handlers page

For the PURCHASE_ORDER_DISPATCH service operation, click the Handlers tab of the Service Operations component. If you are using chunking, select the value of *Active* in the Status field for the OnRoute handler.

Activating the Routings

Access the Service Operations-Routings page.



Service Operations-Routings page

For the PURCHASE_ORDER_DISPATCH service operation, click the Routings tab of the Service Operations component. Activate an outbound routing definition for each receiver node and external alias name that data will be sent to. To activate a routing, select the check box next to the routing definition and click the Activate Selected Routings button. The following routing definitions are predefined:

- The PURCHASE_ORDER_DISPATCH routing definition sends outbound purchase orders using the PeopleSoft standard XML format. This routing definition is used when you are sending data to a third-party system that is using the current version of the service operation.
- The PURCHASE_ORDER_DISPATCH_V1 routing definition sends outbound purchase orders using the PeopleSoft standard XML format and converts the data from the current service operation version (version 2)

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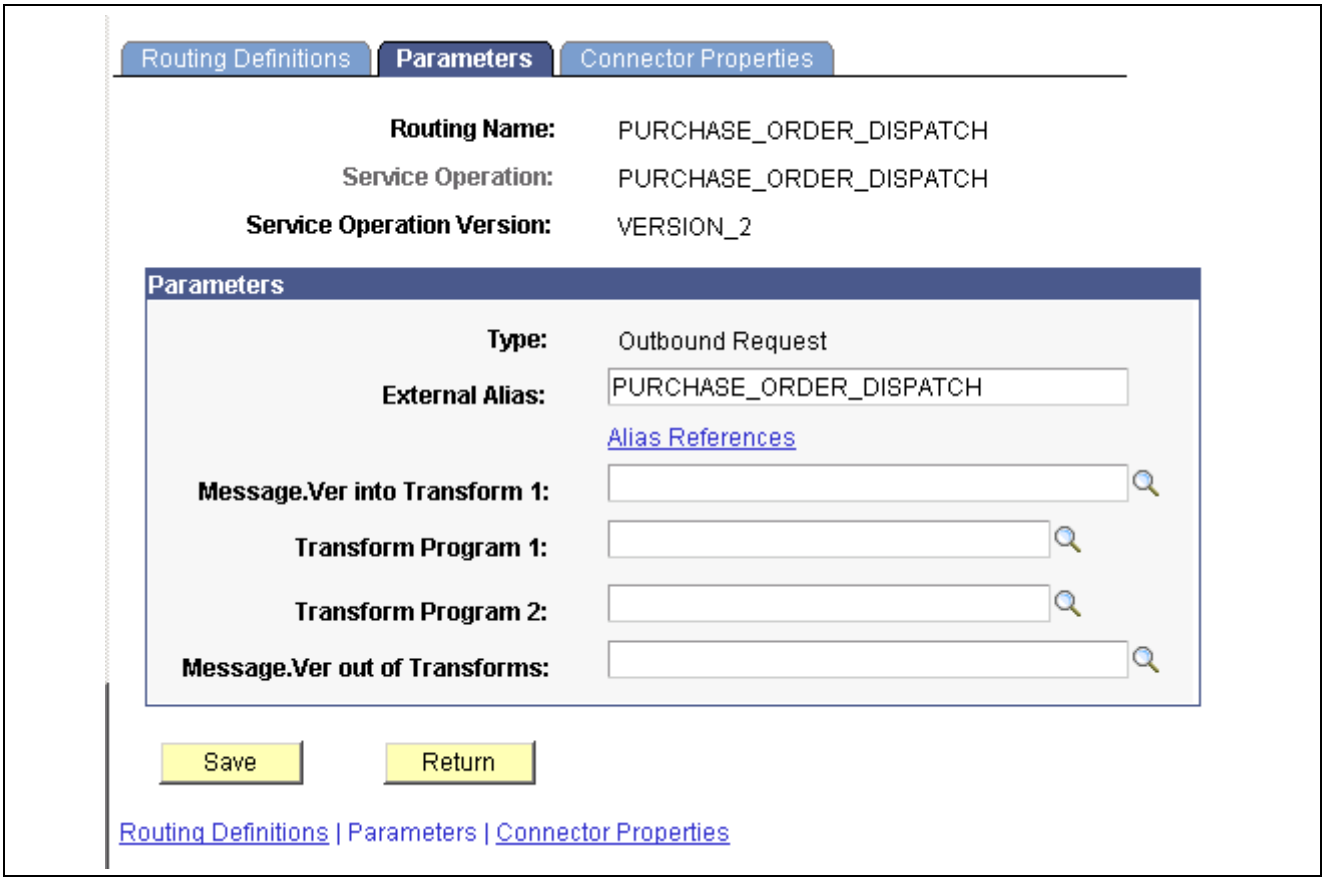
to an older version (version 1) of the service operation. This routing definition is used when you are sending data to a third-party system that is still using an older version of the service operation.

Note. You do not need to select a routing definition if the batch publish rule is set up to post to a flat file only.

Confirming the Parameters of the Routing Definition

Access the Routings-Parameters page.



Routings-Parameters page

On the Routings tab of the Service Operations component, select the link attached to the routing definition name. This link accesses the Routing Definitions component. Select the Parameters tab and complete the following steps:

1. Confirm the external alias name in the External Alias field for the routing is correct. When sending or receiving data, the Integration Broker determines which routing to use by referring to the external alias name, not the routing name.
2. Verify or change the transform programs on this routing definition. A routing definition defines the sending and receiving nodes for a transaction and specifies any inbound and outbound transformations to invoke. A transform program is a type of PeopleSoft Application Engine program that can convert data from one format to another; for example, from XML to a flat file. Use a transform program when one node sends a request or response message with a data structure different from the structure required by the other node. You must decide, based on your environment, to change, remove, or add transform programs.

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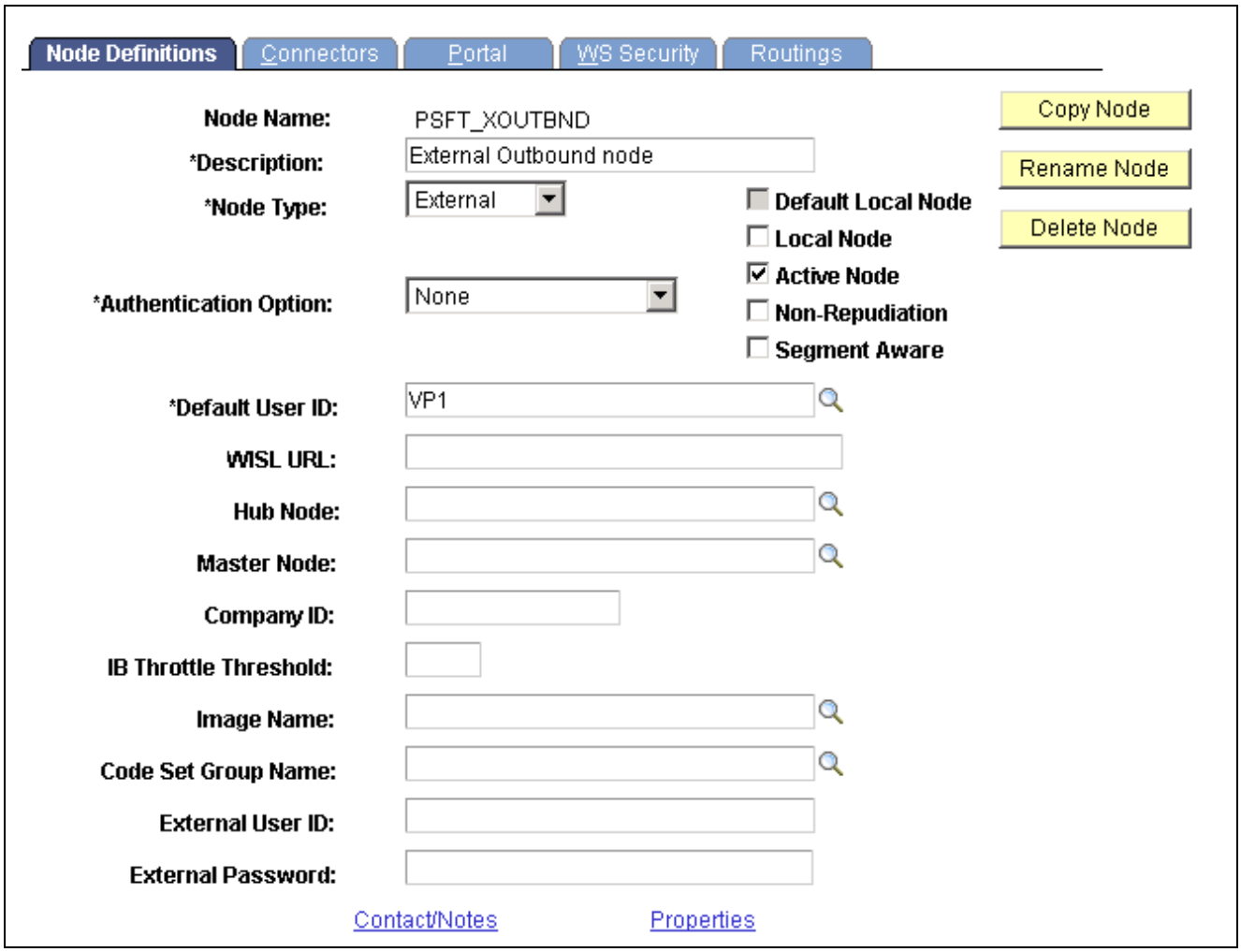
The transform program, to convert data from the current version of a service operation to an older version, is located on the Service Operation Version page of the non-default version. Select the non-default version on the Service Operations-General page to access the Service Operation Version page.

Verifying the Node is Active

Access the Node Definitions page.



Node Definitions page

Verify the Active Node check box has been selected for any nodes used in the routings that you activated on the Service Operations-Routings page for PURCHASE_ORDER_DISPATCH service operation.

Verifying the Node is Connected to the Network

Access the Nodes-Connectors page.

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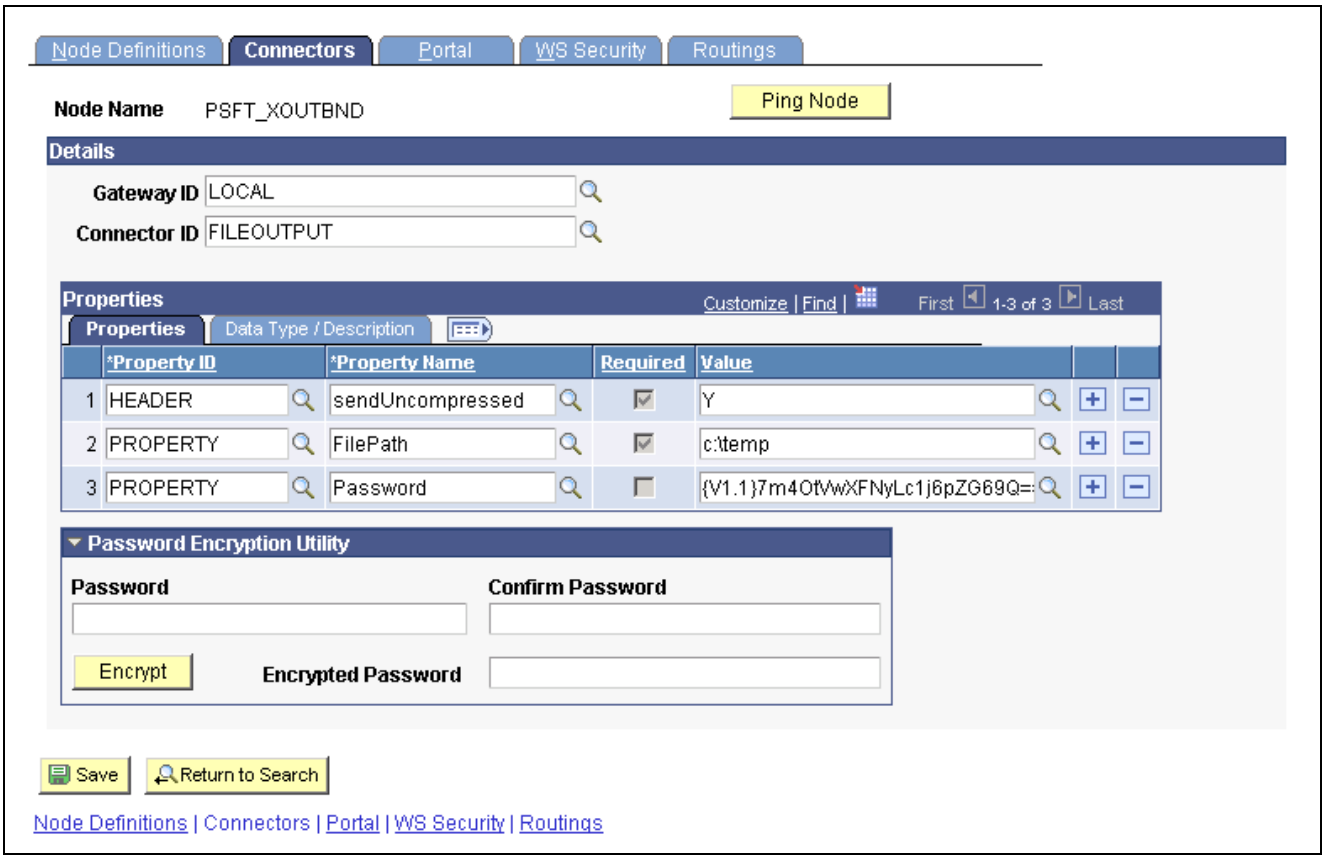

Nodes-Connectors page

For an outbound service operation, verify the node or routing is connected to the correct network using the Gateway ID and Connector ID fields. Depending on the file output location, you may need a password. If a password is needed, you should use the password encryption utility on this page.

Note. Your database administrator will need to assist you with this setup.

Activate the Batch Publish Rule

Access the Batch Publish Rules page.

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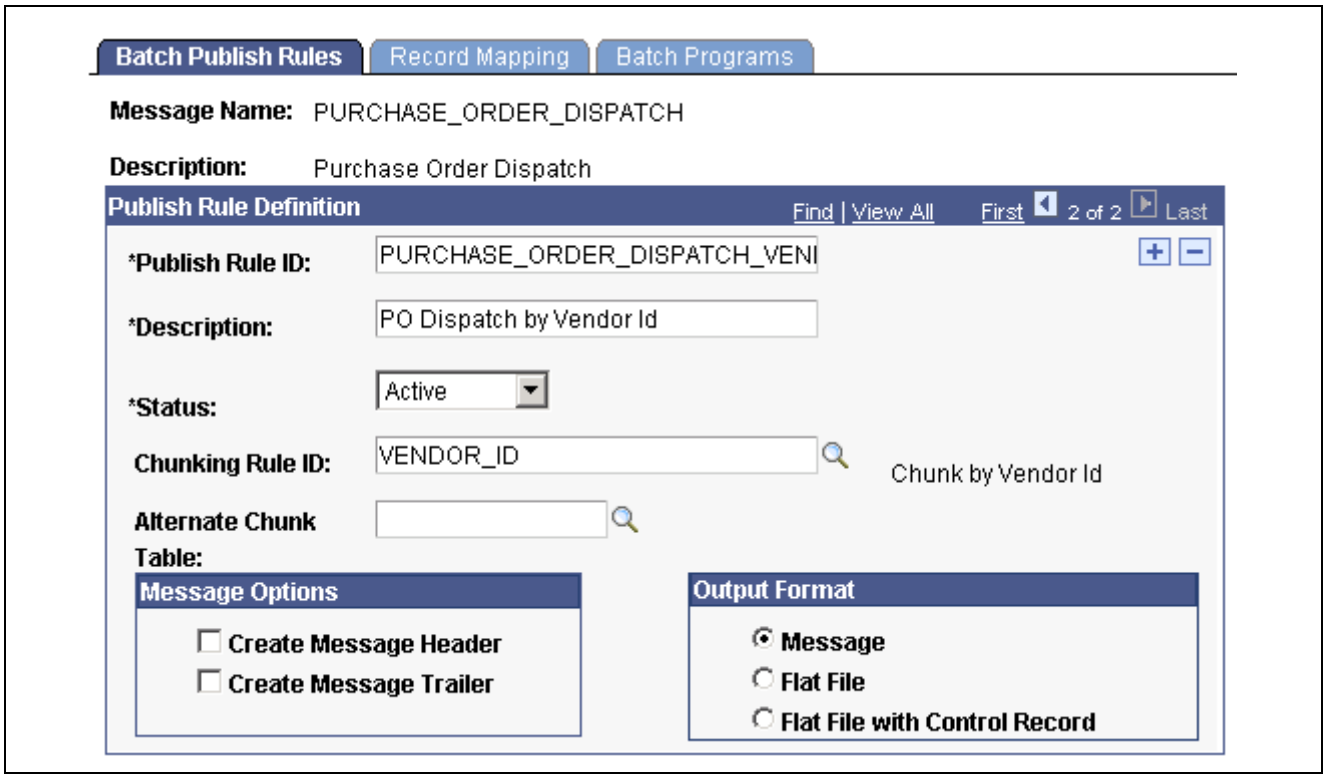

Batch Publish Rules page

For the PURCHASE_ORDER_DISPATCH message name (service operation):

1. Select *Active* Status to activate this publish rule definition.
2. Select the appropriate Output Format. The PeopleSoft Application Engine program can create either an Extensible Markup Language (XML) message that flows through PeopleSoft Integration Broker architecture or a flat file generated on the PeopleSoft Process Scheduler server and not published elsewhere.
3. If you want to use message chunking, configure the chunking rule and then enter it in the Chunking Rule ID field.

See Also

PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook, "Assigning Publishing Rules"

Setting Up Chunking for the Batch Publish Rule

Access the Setup Vendor to Node page.

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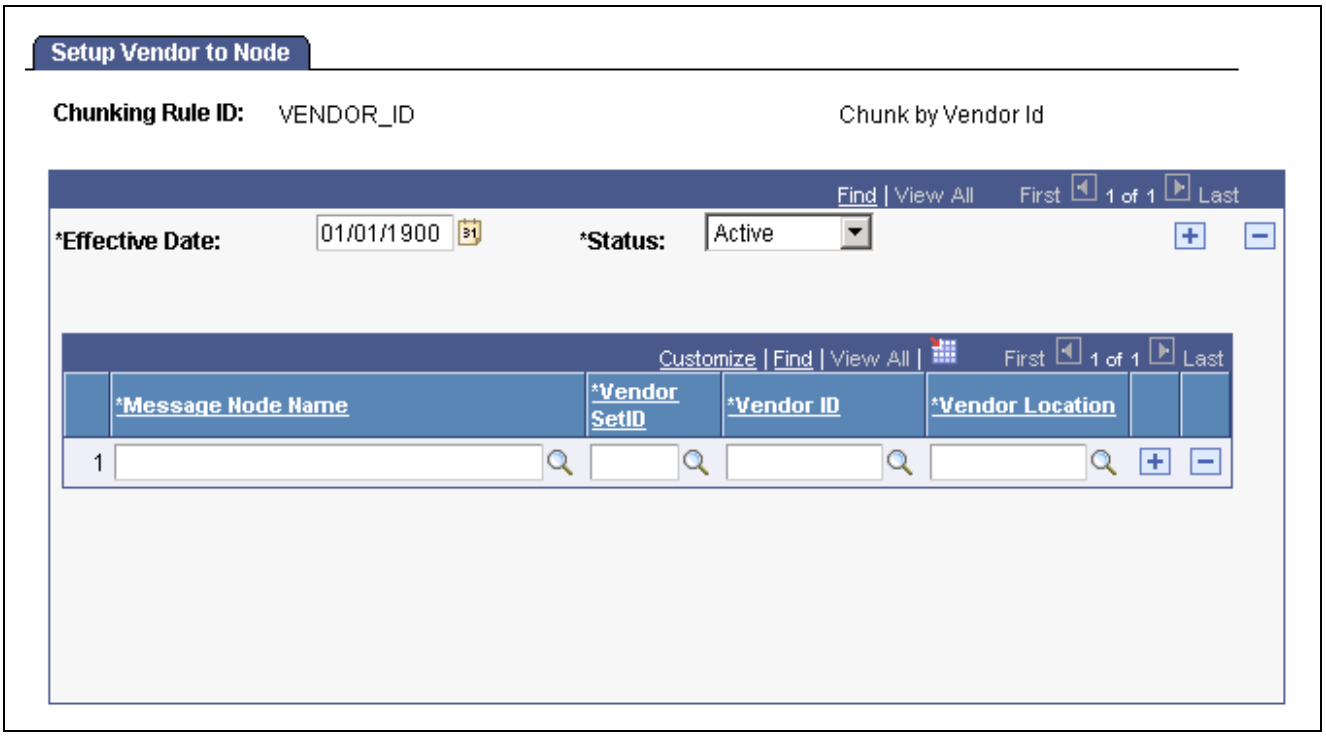

Setup Vendor to Node page

If using chunking for the batch publish rule, set up the chunking rule mapping definitions. You can use a delivered chunking rule or create a new chunking rule.

If using the VENDOR_ID chunking rule ID, access the Setup Vendor to Node page. If using the BUSINESS_UNIT chunking rule ID, access the BusUnit Mapping page.

Select the node for each vendor that receives electronic data.

Chunking is only needed if you have requirements to break up the outbound data and send them to different destinations based on attributes in the message such as business unit or vendor ID. For example, use chunking to send a single vendor's messages to a specific node setup for that trading partner. If you are using a middleware product to actually determine trading partner destinations then a single transaction with all trading partner transactions can usually be sent directly to the middleware product. You would not need to activate message chunking in this situation.

See Also

Chapter 3, "Implementing Integrations," Setting Up Chunking, page 88

Processing the Purchase Order Dispatch EIP

This section discusses processing the purchase order dispatch EIP.

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Creating Purchase Orders Online"

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Dispatching and Printing Purchase Orders"

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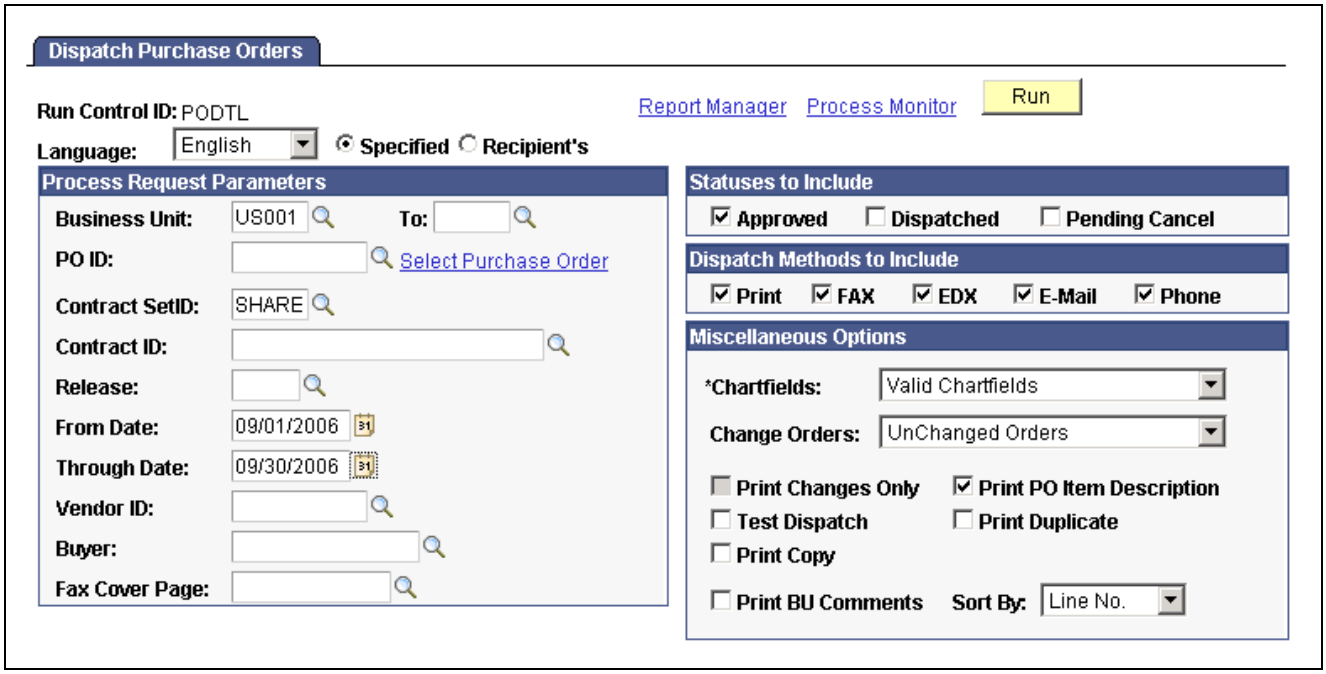
Pages Used to Process the Purchase Order EIP

Page Name	Object Name	Navigation	Usage
Dispatch Purchase Orders	RUN_DISP_POPO005	Purchasing, Purchase Orders, Dispatch POs	Run the PO Dispatch/Print process and dispatch POs, run the Email process, or run the PO Dispatch & Email multiprocess job.
Publish Outbound Message	IN_RUN_PUB_MSG	SCM Integrations, Publish Outbound Message	Initiate the outbound message publish process for outbound SCM messages that use the batch publish design pattern.
PO Dispatch Message Selection Criteria	PO_RUN_POD	Select Purchase Order Dispatch on the Publish Outbound Message page to enable the Purchase Order Dispatch link. Click the Purchase Order Dispatch link to launch the PO Dispatch Message Selection Criteria page.	Launch the Purchase Order Dispatch outbound transaction.

Dispatching Purchase Orders

Access the Dispatch Purchase Orders process page.



Dispatch Purchase Orders page

Ensure that the PO to be dispatched is included in your selection criteria. Click *Run* to stage POs for dispatch.

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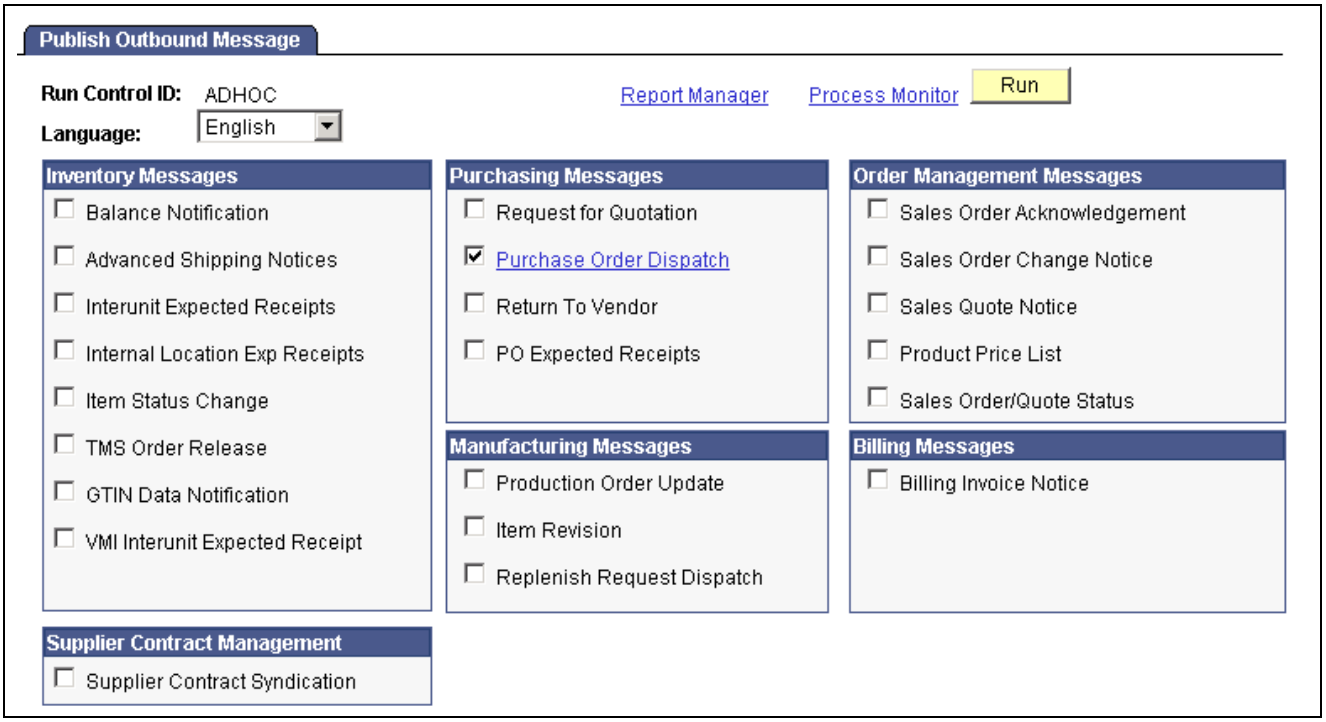
Publishing Outbound Purchase Order Messages

Access the Publish Outbound Message page.



Publish Outbound Message page

Click the Purchase Order Dispatch check box, and click the Purchase Order Dispatch link to access the Purchase Order Dispatch page.

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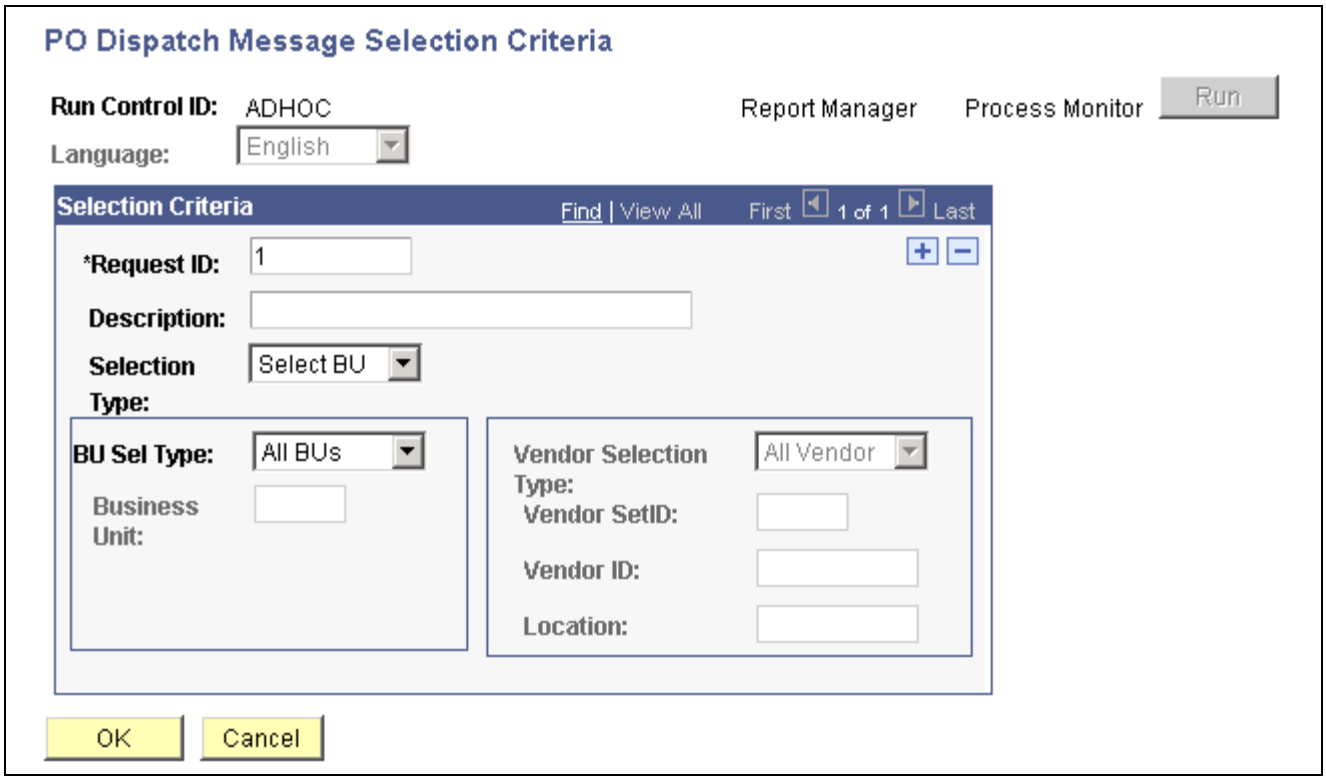

PO Dispatch Message Selection Criteria

1. Select *BU* or *Vendor* as a Selection Type.
2. If you select *BU*, the BU Sel Type fields are enabled, and you can select *All BUs* or a *1 Bus Unit*. If you select *Vendor*, the Vendor Selection Type fields are enabled, and you can select *1 Vendor* or *All Vendor*.

See Also

http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

Setting Up the Advanced Shipping Notice EIP

This section discusses the Advanced Shipping Notice EIP.

Understanding the Advanced Shipping Notice EIP

The Advanced Shipping Notice (ASN) EIP is an asynchronous outbound service operation to notify your customers that a sales order has been shipped. The data from this service operation is passed to an external system or to the PeopleSoft CRM Field Service and CRM Order Capture applications. The Advanced Shipping Notice EIP meets EDI requirements of the X.12 856−Shipping Notice/Manifest transaction set, and is also used with warehouse management systems. An ASN transaction is generated when a sales order entered from PeopleSoft Order Management has been depleted in PeopleSoft Inventory. You can specify whether to generate the ASN for all sales order shipments in the business unit, sales orders belonging to a specific shipping ID, sales orders for a specific sold to customer, or sales orders for a specific ship to customer.

Before you can publish messages with the Advanced Shipment Notice EIP, you must:

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Type of Setup	Steps
Complete application setup	• Select the Use Advanced Shipment Notice option for the business unit on the Inventory Definition - Business Unit Options page. • Associate customers receiving Advanced Shipment Notice EIP data with an *ASN* document code and a preferred communication value of *XML Only* or *XML and Print*. If PeopleSoft Order Management is installed, you set up these values on the Contact Additional Info page in the Contact Information component.
Complete Integration Broker setup	• Activate the ADVANCED_SHIPPING_NOTICE service operation. • Verify the queue is in run mode. • Activate the handler. • Activate the routing. • Confirm the parameters of the routing definition. • Verify the node is active and connected to the correct network.
Complete Enterprise Component setup	• Activate the associated batch publish rule and specify the appropriate output for the message (an XML-based message or a flat file). If you are using message chunking, select a chunking rule ID. • If you are using message chunking, set up the chunking rule mapping definitions.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Creating Shipping Documentation," Creating Advanced Shipping Notices

Chapter 7, "Integrating With a Third-Party Point-of-Use Supplier System," page 211

Chapter 8, "Integrating With a Third-Party Surgical Resource Software Application," page 219

Pages Used to Set Up the Advanced Shipping Notice EIP

Page Name	Object Name	Navigation	Usage
Business Unit Definition - Inventory Options page	BUS_UNIT_INV5	Set Up Financials/Supply Chain, Business Unit Related, Inventory, Inventory Definition, Inventory Options	Define external interfaces.
Contact	CONTACT	Customers, Contact Information	Maintain information about each contact.
Contact Customer	CONTACT_CUST_PAGE	Click the Contact Customer Information link on the Contact page.	Indicate the primary ship to contact.

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Page Name	Object Name	Navigation	Usage
Contact Additional Info	CONTACT_ADDTL_INFO	Click the Additional Info link for a contact on the Contact Customer page.	Enter the preferred communication method for the selected document.
Service Operations-General	IB_SERVICE	PeopleTools, Integration Broker, Integration Setup, Service Operations, General	Define and activate a service operation.
Service Operations-Handlers	IB_SERVICEHDLR	PeopleTools, Integration Broker, Integration Setup, Service Operations, Handlers	Activate one or more service operation handlers.
Service Operations-Routings	IB_SERVICERTNGS	PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings	Define and activate routing definitions on the service operation.
Routings-Parameters	IB_ROUTINGDEFNDOC	• PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings. Select the link attached to the routing definition name, then select the Parameters tab. • PeopleTools, Integration Broker, Integration Setup, Routings, Parameters	Verify the external service alias name, nodes, and transform programs used by this routing.
Queue Definitions	IB_QUEUEDEFN	• PeopleTools, Integration Broker, Integration Setup, Service Operations, General. Select the Queue link attached to this service operation. • PeopleTools, Integration Broker, Integration Setup, Queues	Activate the queue used by the service operation.
Node Definitions	IB_NODE	PeopleTools, Integration Broker, Integration Setup, Nodes, Node Definitions	Activate node used by the service operation.
Nodes-Connectors	IB_NODECONN	PeopleTools, Integration Broker, Integration Setup, Nodes, Connectors	For an outbound service operation, verify the node is connected to the correct network.
Batch Publish Rules	EO_MSGPUBATCH	Enterprise Components, Integration Definitions, Batch Publish Rules	Set up publication rules. You must activate a publish rule for the publication messages you create to follow. This rule includes instructions on message chunking, if necessary.
Customer ID Chunk	OM_CHUNKCUSTID	SCM Integrations, Chunking Rule, CustID to Node Mapping	Set up chunking for the batch publish rule.

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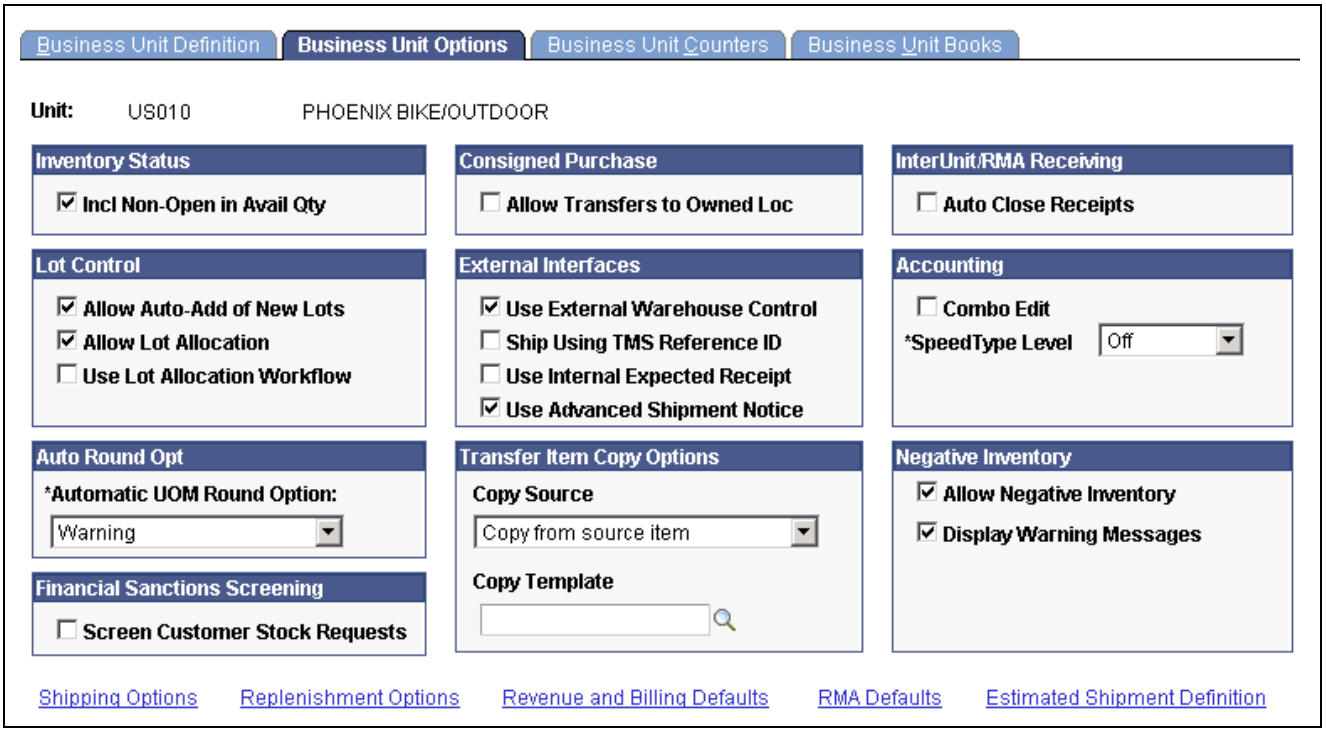
Enabling the Inventory Business Unit

You must enable ASN generation in the business unit shipping the items.

Access the Inventory Definition - Business Unit Options page.



Inventory Definition - Business Unit Options page

Select the Use Advanced Shipment Notice check box in the External Interfaces group box.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Defining Your Operational Structure in PeopleSoft Inventory," Defining PeopleSoft Inventory Business Unit Attributes

Verifying Contacts

You must ensure that the customer you are interacting with has a contact set up to accept EDI transmissions, and that the contact is a ship to contact.

Access the Contact page using the Customer ID in the *correct history* mode.

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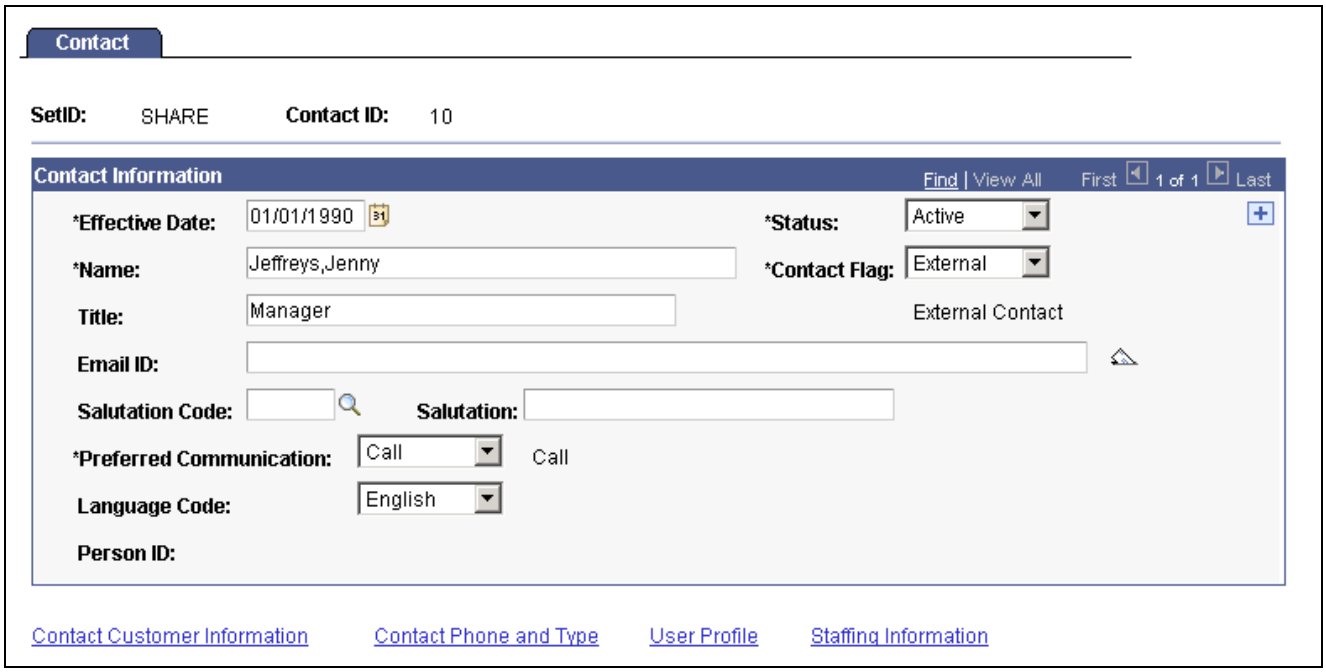
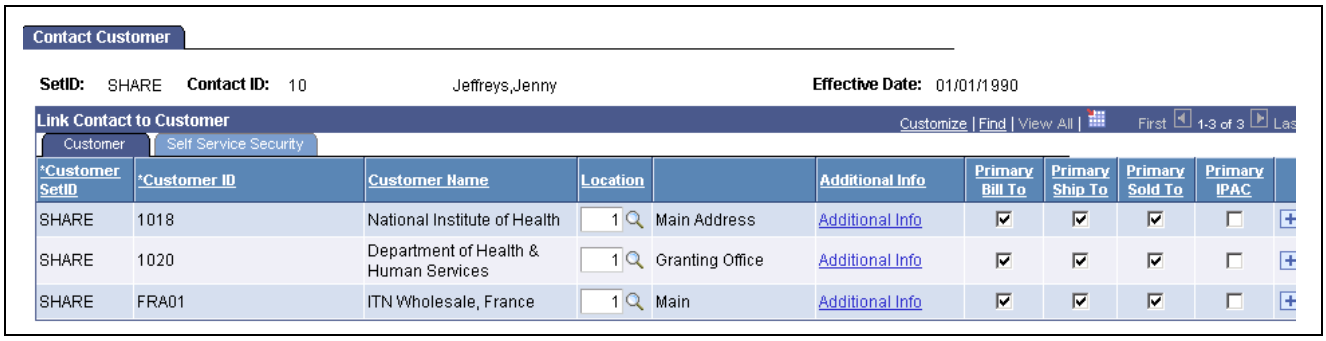


Contact page

Access the Contact Customer page using the Contact Customer Information link on the Contact page.



Contact Customer page

Select the Primary Ship To check box to receive the proper shipping notifications.

Click the Additional Info link corresponding to the appropriate customer to access the Contact Additional Info page.

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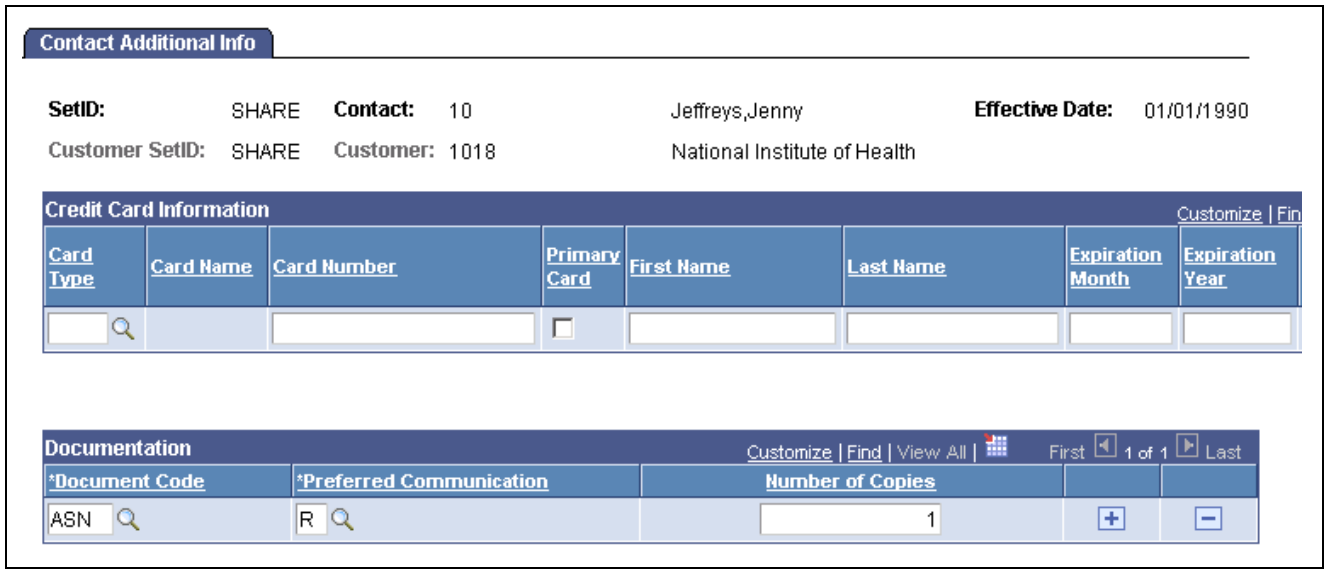

Contact Additional Info page

Under the Documentation group box, make sure the Document Code is *ASN* (advanced shipping notification), and Preferred Communication is *R* (XML and Print) or *I* (XML only).

See Also

PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook, "Maintaining Contacts," Selecting Communication Preferences and Entering Contact Credit Card Information

Activating the ASN Service Operation

Use the PeopleSoft Integration Broker to activate the Advanced Shipping Notice service operation.

Access the Service Operations-General page.

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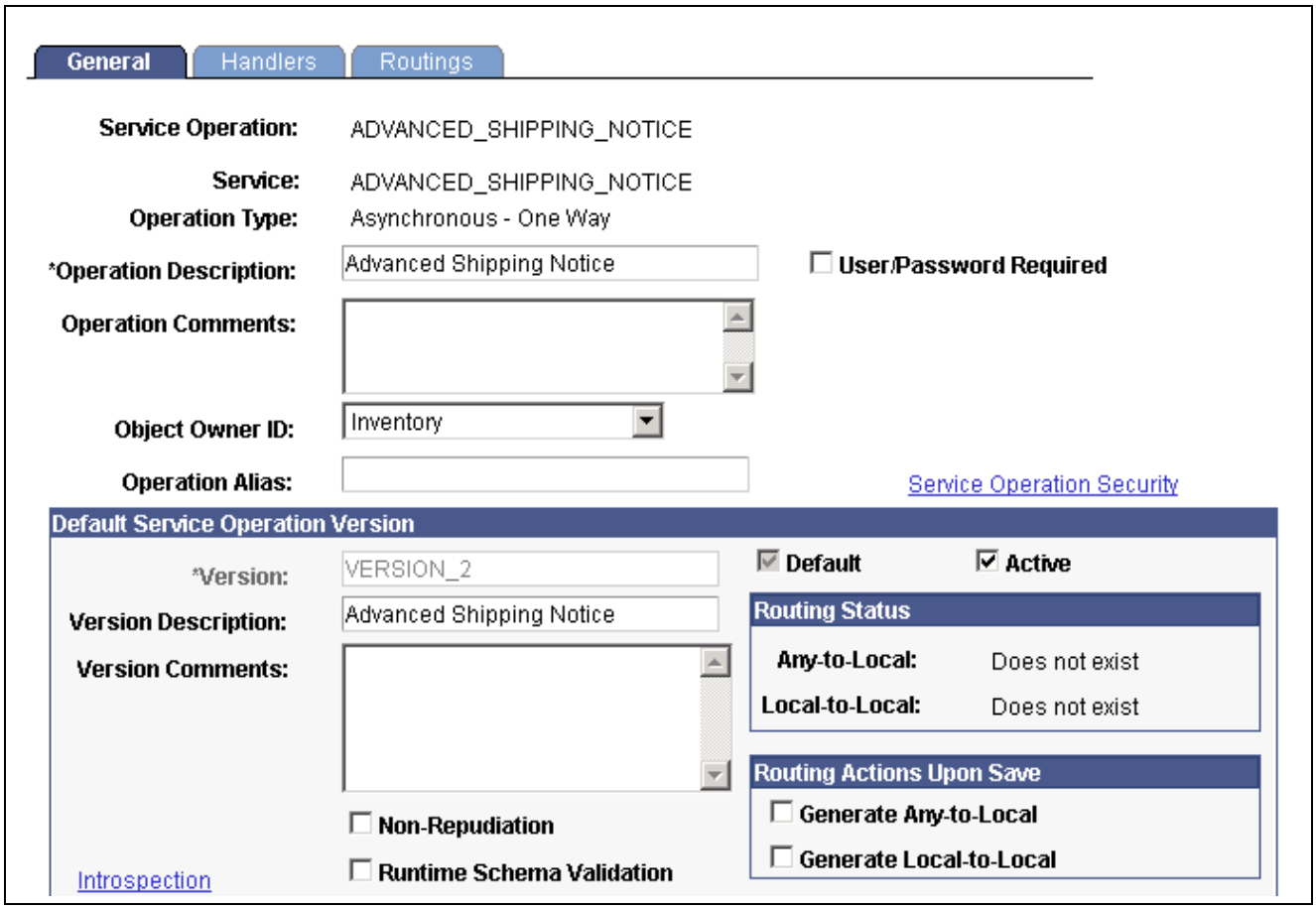
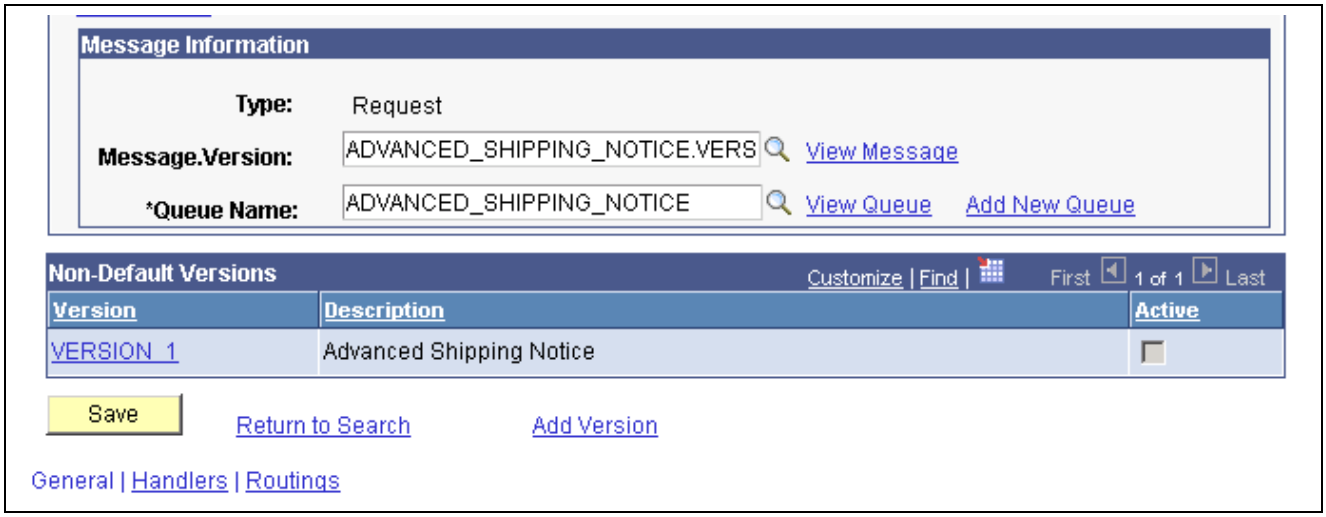


Service Operations-General page (1 or 2)



Service Operations-General page (2 or 2)

For the ADVANCED_SHIPPING_NOTICE service operation, select the Active check box for the applicable service operation version. If the desired version is not the default version for the service operation, the default version must also be activated.

On the General tab of the Service Operations component, select the View Queue link at the bottom of the page to access the Queue Definitions page.

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Service Operation Versions

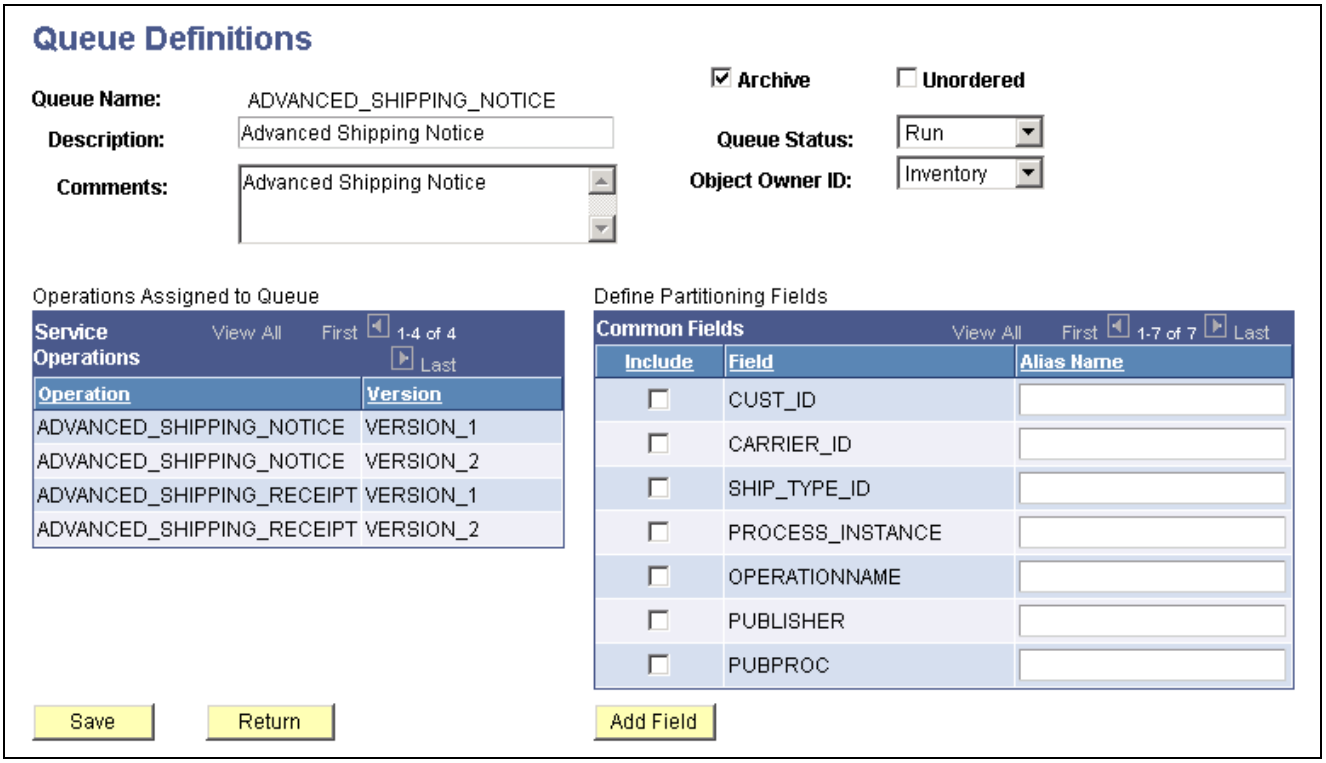
The Default Service Operation Version group box displays the most current version of this service operation. If there have been changes to the PeopleSoft application that have required the service operation to change, for example new fields or tables, then the Non-Default Versions group box displays any older versions of the service operation based on the older release of the PeopleSoft application. The default version is always the current version, however you can use a non-default version to communicate with third-party systems that want to receive the data based on an old version. Select the link in the Non-Default Versions box to access the Service Operation Version page. This page contains information about the non-default version, including message and queue. In addition, the Logical Transforms group box contains transforms to convert the data to or from the default version. A transform program is a type of PeopleSoft Application Engine program that can convert data from one format to another. Based on your environment, you will review and possibly change these transforms.

See Also

PeopleTools 8.48 PeopleBook: PeopleSoft Integration Broker

Verifying the Queue is in Run Mode

Access the Queue Definitions page.



Queue Definitions page

For the ADVANCED_SHIPPING_NOTICE queue, verify the Queue Status field has a value of *Run.*

Click the Return button to go back to the Service Operations component.

Activating the Handler

Access the Service Operations-Handlers page.

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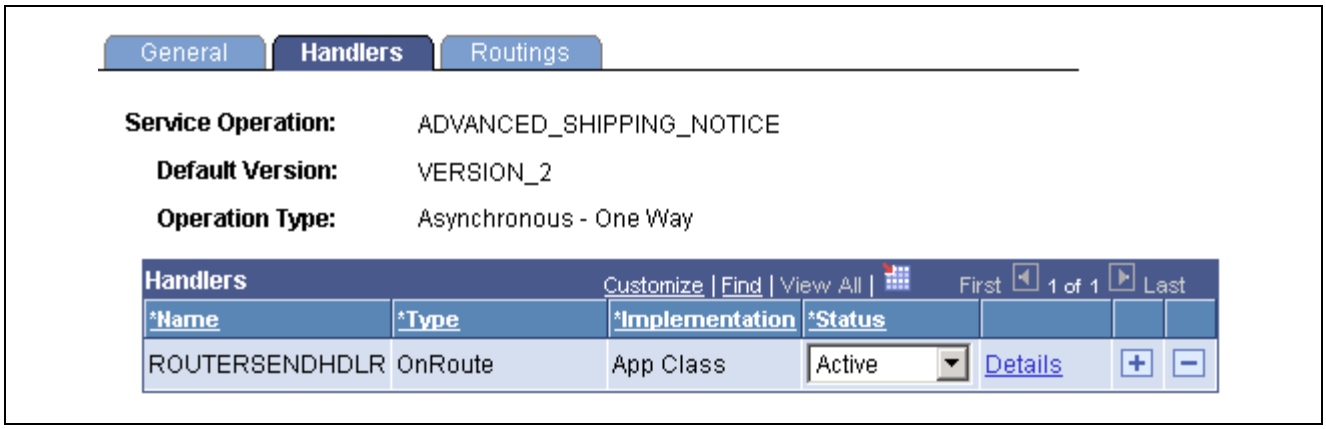
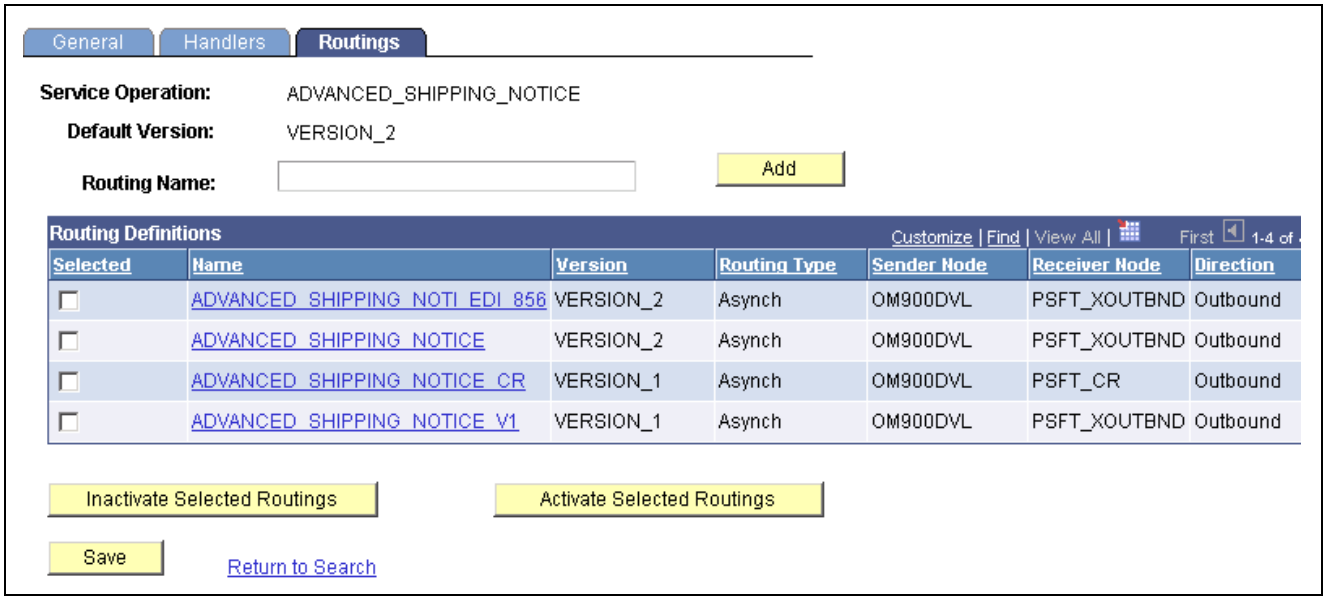


Service Operations-Handlers page

For the ADVANCED_SHIPPING_NOTICE service operation, click the Handlers tab of the Service Operations component. If you are using chunking, select the value of *Active* in the Status field for the OnRoute handler.

Activating the Routings

Access the Service Operations-Routings page.



Service Operations-Routings page

For the ADVANCED_SHIPPING_NOTICE service operation, click the Routings tab of the Service Operations component. Activate an outbound routing definition for each receiver node and external alias name that data will be sent to. To activate a routing, select the check box next to the routing definition and click the Activate Selected Routings button. The following routing definitions are predefined:

- The ADVANCED_SHIPPING_NOTI_EDI_856 routing definition sends outbound shipping notices using the EDI X.12 856 format as a flat file. The data is converted from the PeopleSoft standard XML format to the EDI X.12 856 transaction format and then from XML to a flat file. If you wish to send the data as an XML file using the EDI X.12 856 format, then alter the routing definition to remove the second transform program.
- The ADVANCED_SHIPPING_NOTICE routing definition sends outbound shipping notices using the PeopleSoft standard XML format. This routing definition is used when you are sending data to a third-party system that is using the current version of the service operation.

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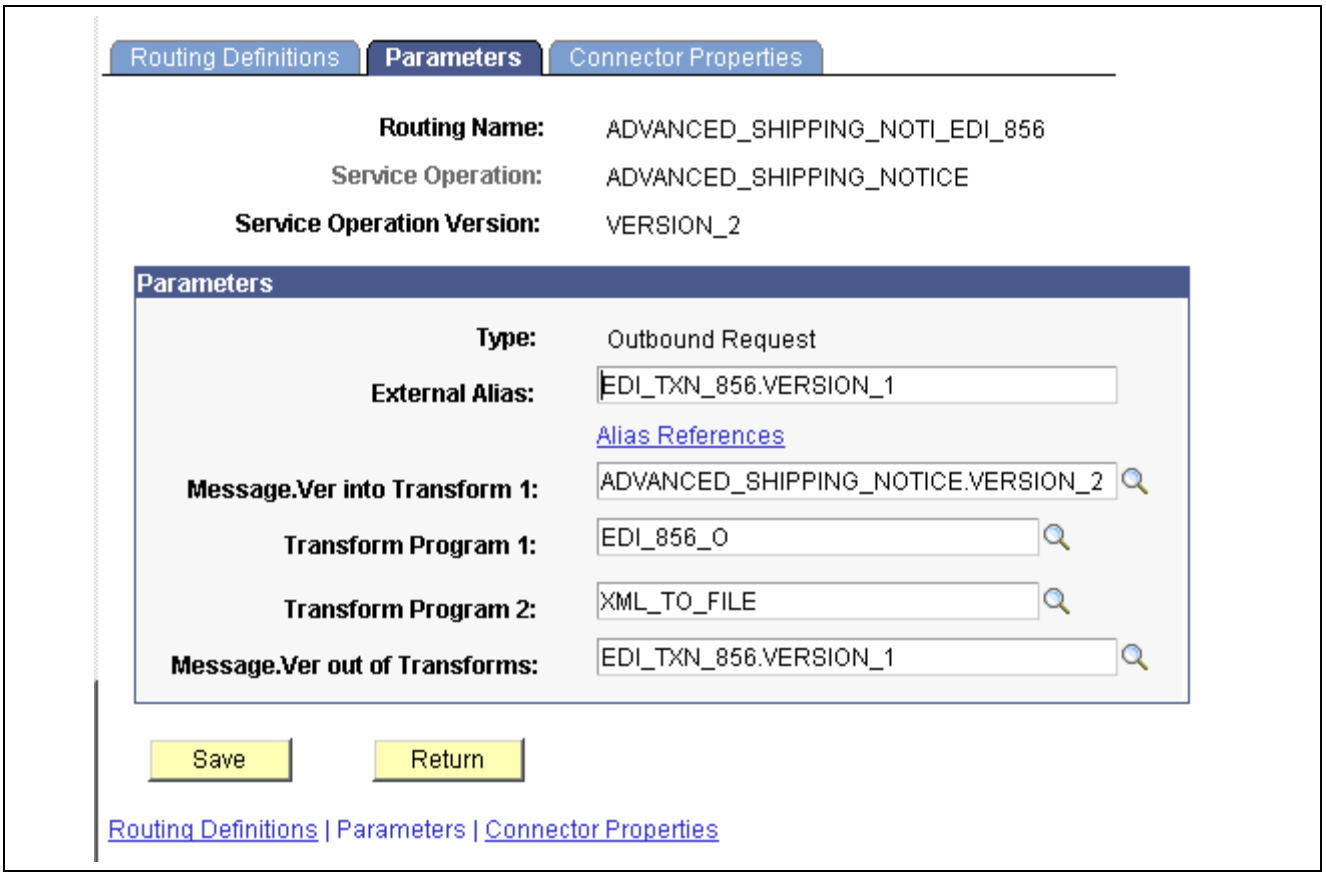
- The ADVANCED_SHIPPING_NOTICE_CR routing definition sends outbound shipping notices using the PeopleSoft standard XML format to PeopleSoft CRM.
- The ADVANCED_SHIPPING_NOTICE_V1 routing definition sends outbound shipping notices using the PeopleSoft standard XML format and converts the data from the current service operation version (version 2) to an older version (version 1) of the service operation. This routing definition is used when you are sending data to a third-party system that is still using an older version of the service operation.

Note. You do not need to select a routing definition if the batch publish rule is set up to post to a flat file only.

Confirming the Parameters of the Routing Definition

Access the Routings-Parameters page.



Routings-Parameters page

On the Routings tab of the Service Operations component, select the link attached to the routing definition name. This link accesses the Routing Definitions component. Select the Parameters tab and complete the following steps:

1. Confirm the external alias name in the External Alias field for the routing is correct. When sending or receiving data, the Integration Broker determines which routing to use by referring to the external alias name, not the routing name.
2. Verify or change the transform programs on this routing definition. A routing definition defines the sending and receiving nodes for a transaction and specifies any inbound and outbound transformations to invoke. A transform program is a type of PeopleSoft Application Engine program that can convert data from one format to another; for example, from XML to a flat file. Use a transform program when one node sends a request or response message with a data structure different from the structure

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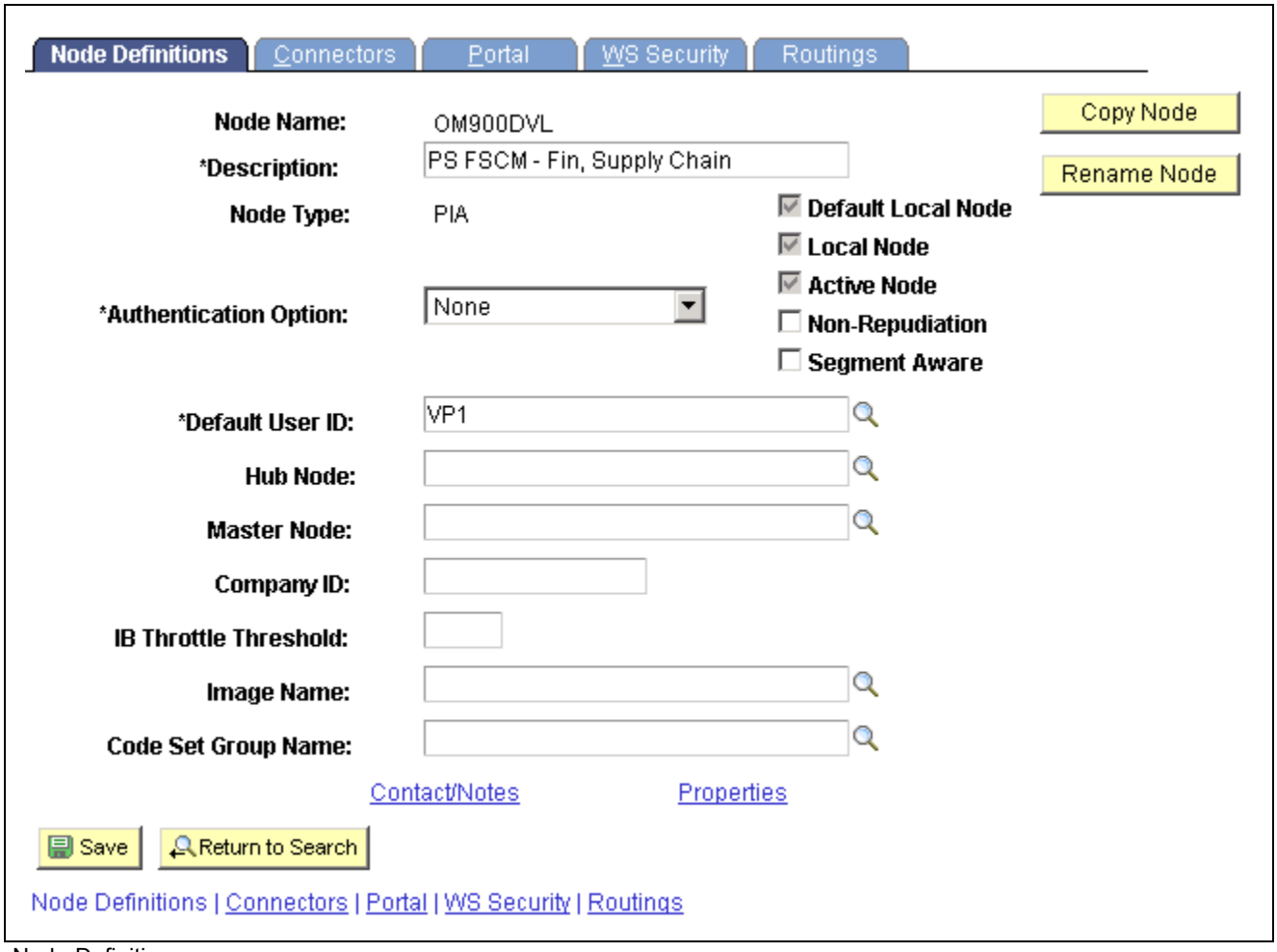
required by the other node. You must decide, based on your environment, to change, remove, or add transform programs. The ADVANCED_SHIPPING_NOTI_EDI_856 routing definition is delivered with two transform programs. The EDI_856_O transform program converts outbound shipping notices from the standard PeopleSoft XML format to the EDI X.12 856 transaction format (still in XML). The XML_TO_FILE transform program converts the EDI X.12 856 formatted data from XML to a flat file format. You can remove the XML_TO_FILE transform program to send your data in the XML EDI X.12 856 format. If you are not using EDI then you will want to use the ADVANCED_SHIPPING_NOTICE routing definition instead.

The transform program, to convert data from the current version of a service operation to an older version, is located on the Service Operation Version page of the non-default version. Select the non-default version on the Service Operations-General page to access the Service Operation Version page.

Verifying the Node is Active

Access the Node Definitions page.



Node Definitions page

Verify the Active Node check box has been selected for any nodes used in the routings that you activated on the Service Operations-Routings page for ADVANCED_SHIPPING_NOTICE service operation.

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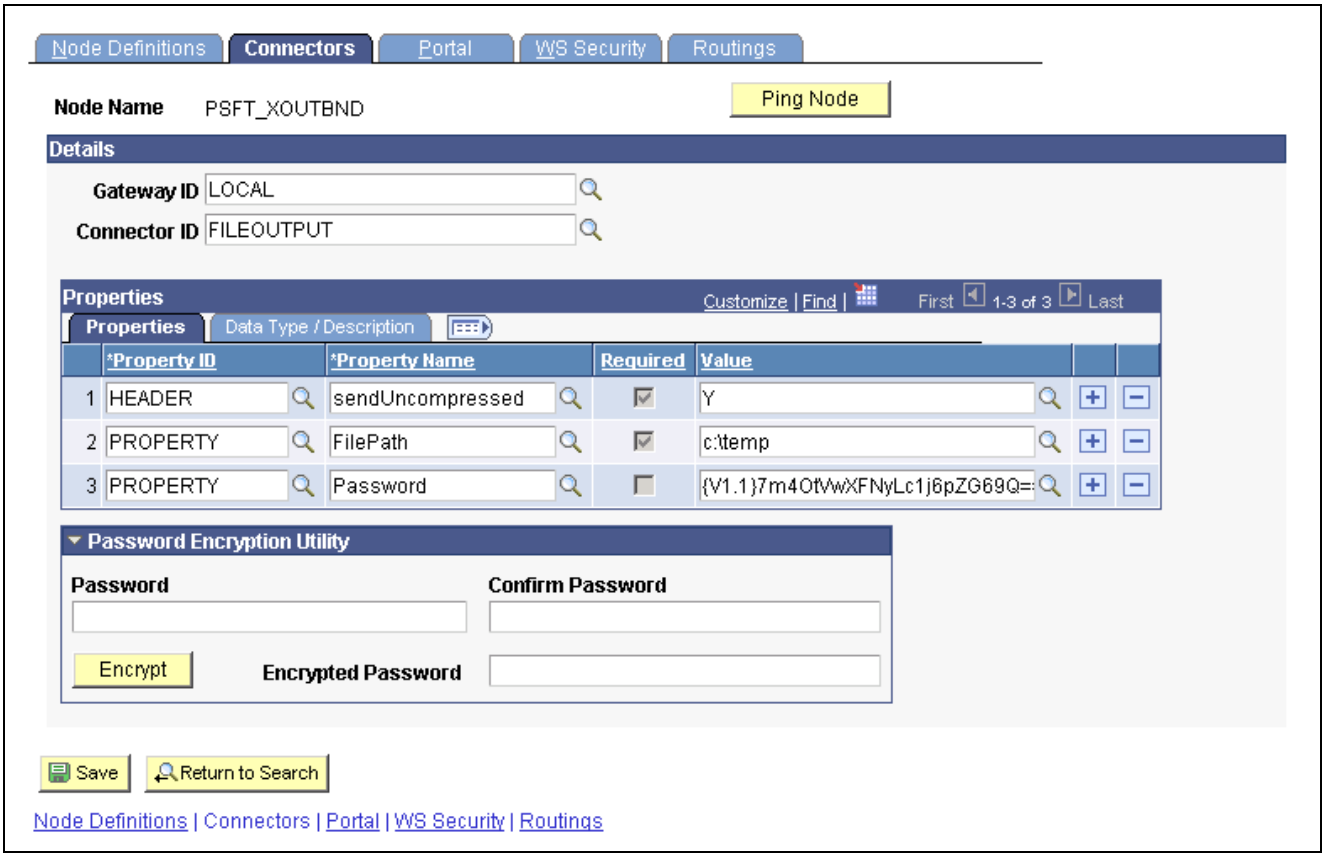
Verifying the Node is Connected to the Network

Access the Nodes-Connectors page.



Nodes-Connectors page

For an outbound service operation, verify the node or routing is connected to the correct network using the Gateway ID and Connector ID fields. Depending on the file output location, you may need a password. If a password is needed, you should use the password encryption utility on this page.

Note. Your database administrator will need to assist you with this setup.

Activate the Batch Publish Rule

Access the Batch Publish Rules page.

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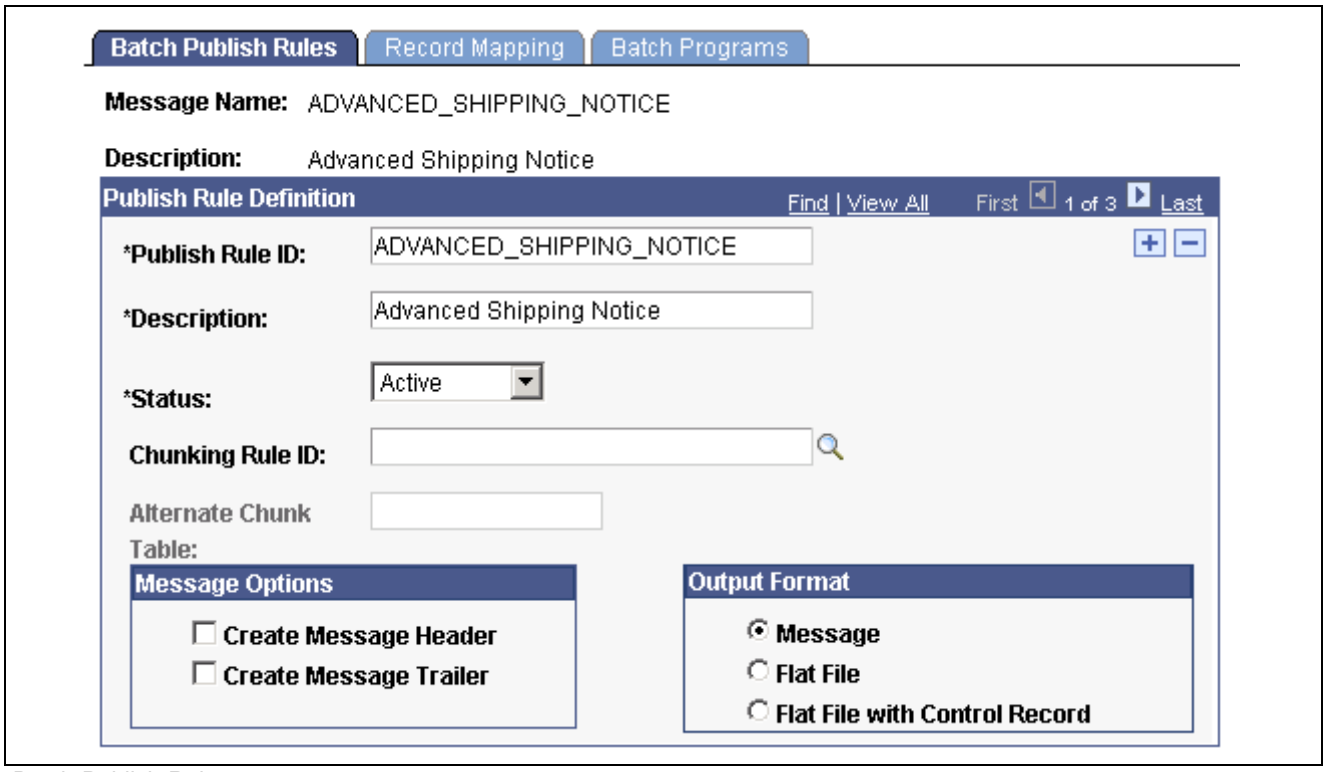

Batch Publish Rules page

For the ADVANCED_SHIPPING_NOTICE message name (service operation):

1. Select *Active* Status to activate this publish rule definition.
2. Select the appropriate Output Format. The PeopleSoft Application Engine program can create either an Extensible Markup Language (XML) message that flows through PeopleSoft Integration Broker architecture or a flat file generated on the PeopleSoft Process Scheduler server and not published elsewhere. If you are sending data to a PeopleSoft system, select Message as your format.
3. If you want to use message chunking, configure a chunking rule and then enter it in the Chunking Rule ID field.

See Also

PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook, "Assigning Publishing Rules," Assigning Batch Publishing Rules

Setting Up Chunking for the Batch Publish Rule

Access the Customer ID Chunk page.

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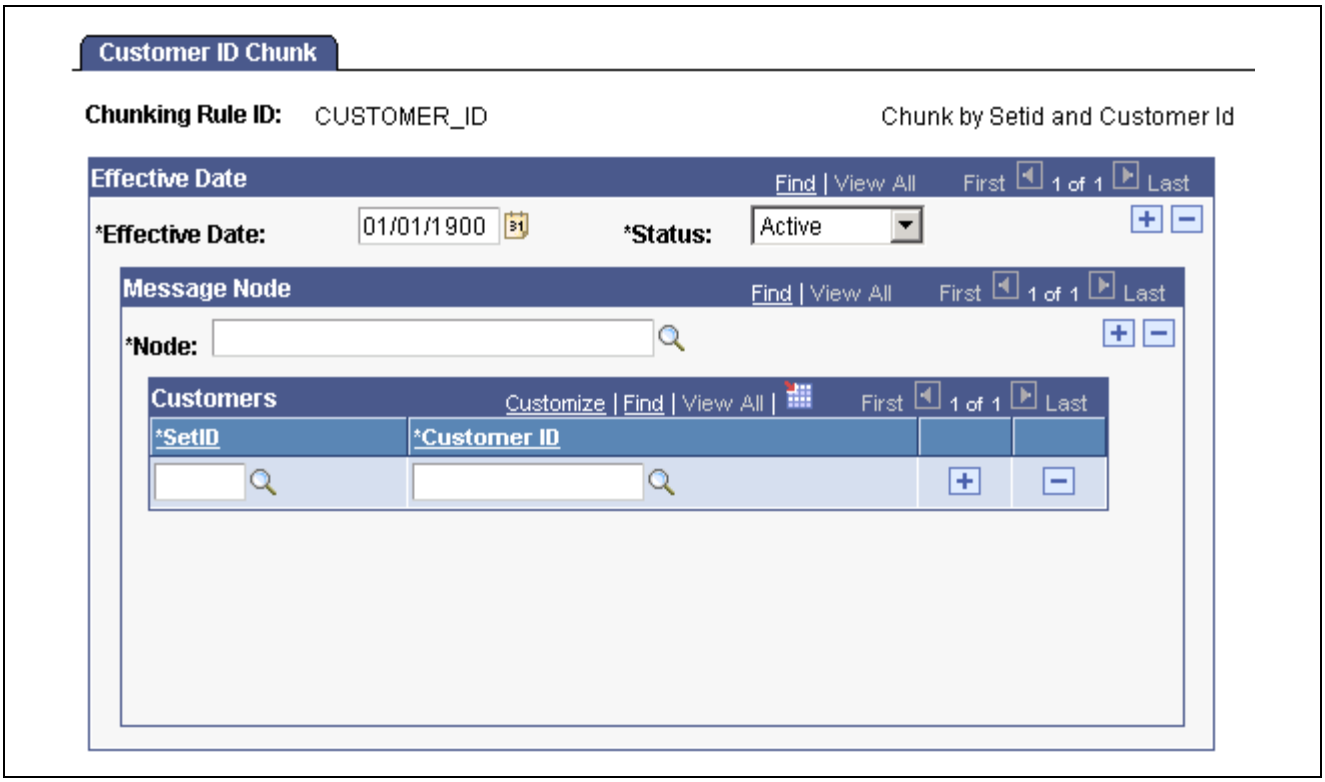

Customer ID Chunk page

If using chunking for the batch publish rule, set up the chunking rule mapping definitions. You can use a delivered chunking rule or create a new chunking rule.

If using the CUSTOMER_ID chunking rule ID, access the Customer ID Chunk page.

Select the node for each customer that receives electronic data.

Chunking is only needed if you have requirements to break up the outbound data and send them to different destinations based on attributes in the message such as business unit or customer ID. The most common use of chunking with the ASN message is to send a single customer's messages to a specific node setup for that trading partner. If you are using a middleware product to actually determine trading partner destinations then a single transaction with all trading partner transactions can usually be sent directly to the middleware product. You would not need to activate message chunking in this situation.

See Also

Chapter 3, "Implementing Integrations," Setting Up Chunking, page 88

Processing the Advanced Shipping Notice EIP

This sections discusses processing the Advanced Shipping Notice EIP.

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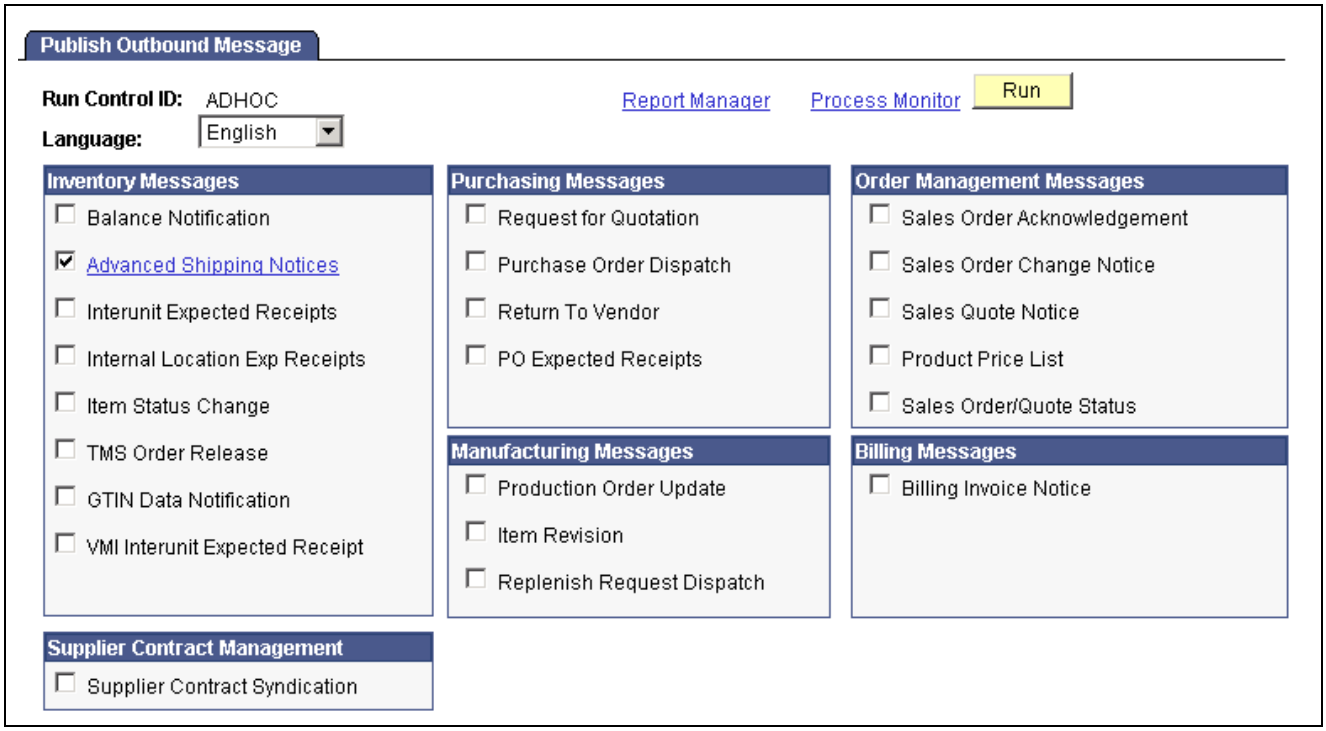
Pages Used to Process the Advanced Shipping Notice EIP

Page Name	Object Name	Navigation	Usage
Publish Outbound Message	IN_RUN_PUB_MSG	SCM Integrations, Publish Outbound Message	Initiate the outbound message publish process for outbound SCM messages that use the batch publish design pattern.
Advanced Shipping Notices Selection Criteria	IN_RUN_SHPNTC_ASN	Select Advanced Shipping Notices on the Publish Outbound Message page to enable the Advanced Shipping Notices link. Click the Advanced Shipping Notices link to access the Advanced Shipping Notices Selection Criteria page.	Launch the Advanced Shipping Notices outbound transaction for sales orders that have been depleted.

Publishing Advanced Shipping Notices

Access the Publish Outbound Message page.



Publish Outbound Message page

Click the Advanced Shipping Notices check box, and click the Advanced Shipping Notices link to access the Advanced Shipping Notices Selection Criteria page.

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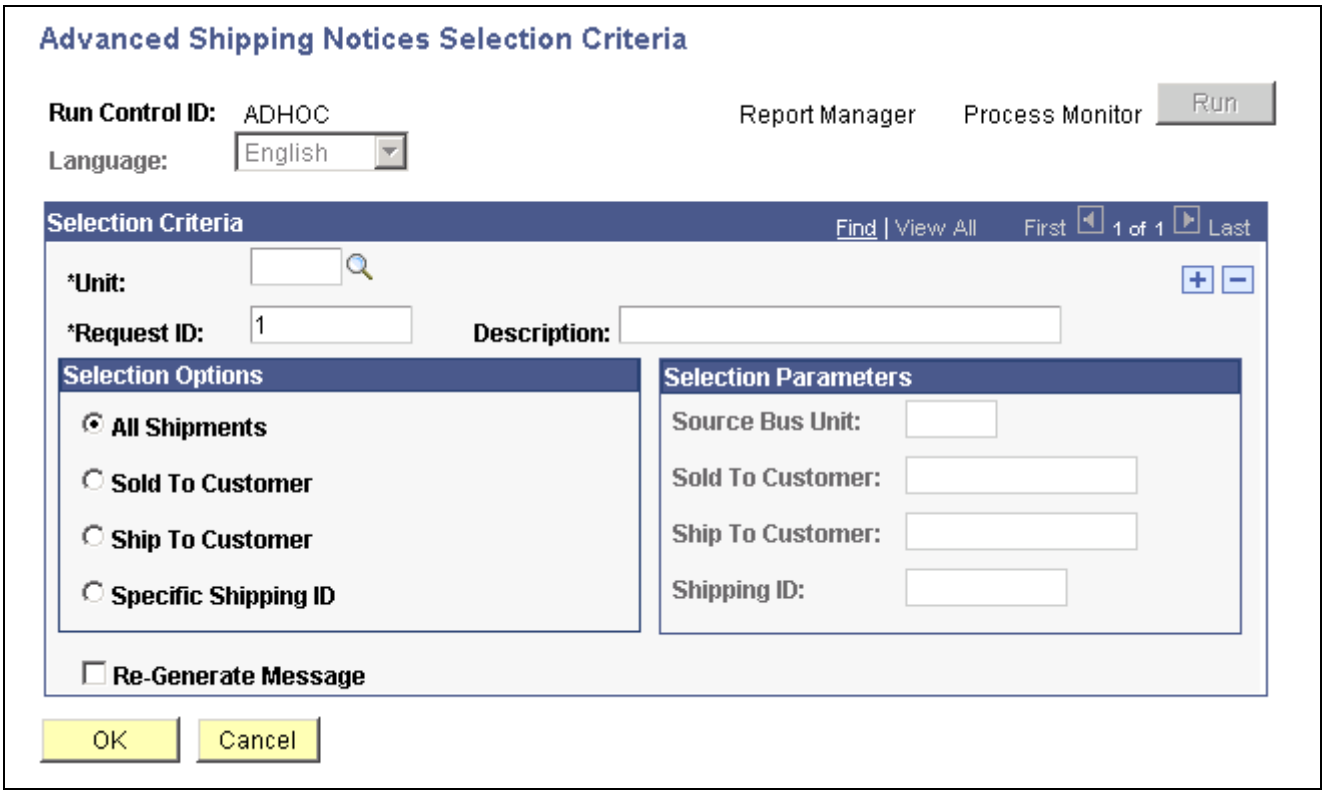

Advanced Shipping Notices Selection Criteria page

All Shipments Select to generate this transaction for all sales order shipments that have been through the Depletion process (INPDDEPL), but have not previously generated an ASN.

Sold To Customer Select to generate this transaction for a sales order with a specific sold to customer.

Ship To Customer Select to generate this transaction for a sales order with a specific ship to customer.

Specific Shipping ID Select to generate this transaction for sales orders with a specific shipping ID.

Source Bus Unit Select a valid source business unit. A source business unit is the PeopleSoft Order Management business unit that created the sales order. This field is required if you elect in the Selection Options group box to generate this transaction for a specific sold to or ship to customer. This field is not available for entry if you elect in the Selection Options group box to generate this transaction for all shipments, or for a specific shipping ID.

Sold To Customer Select a valid sold to customer. This field is only available for entry and is required if you elect in the Selection Options group box to generate this transaction for a specific sold to customer.

Ship To Customer Select a valid ship to customer. This field is only available for entry and is required if you elect in the Selection Options group box to generate this transaction for a specific ship to customer.

Shipping ID Select a valid shipping ID. This field is only available for entry and is required if you elect in the Selection Options group box to generate this transaction for a specific shipping ID.

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Re-Generate Message Select this option to regenerate a message for data that have already been sent out.

Note. When you navigate to the process monitor and wait till the process completes successfully, you can click the Details link and then the View Log/Trace link. This shows the output file as a link. The system generates the flat file to reflect the ASN information for the corresponding shipping ID.

Data Separation

PeopleSoft Inventory creates a single occurrence of an ASN transaction for each combination of business unit, source business unit, sold to customer, ship to customer, shipping ID, carrier ID, and ship via. The transaction also lists the ASN creation date and time, the source business unit's address, the vehicle ID, the quantity ordered, the shipping weight, and, if defined, the shipping container ID and container type.

PeopleSoft sends the generated transaction to the ship to customer, the sold to customer, or both.

Troubleshooting Information

The system does not create an ASN under the following circumstances:

- The shipment has not been through the depletion process. You can launch the depletion process using the Deplete On Hand Qty Requests process, the Shipping/Issues-Order Summary page, the Express Issue page, the Front End Shipping process, or the Shipping process.
- The order is a *direct ship from vendor* sales order.
- The order is for a non-inventory item.
- The transaction has a demand source other than PeopleSoft Order Management.
- PeopleSoft Order Management is not installed.

See Also

http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

Setting Up the Billing Invoice EIP

This section discusses the Billing Invoice EIP.

Understanding the Billing Invoice EIP

The Billing Invoice Notice EIP is an asynchronous outbound service operation to send invoices to your customers. The data from this service operation is passed to an external system. The Billing Invoice Notice EIP meets EDI requirements of the X.12 810 transaction set. The transaction is generated when you run the Finalize Bills process (BIIVC000); this populates the BI_HDR_EC table with the outbound invoice data. Once the data is in BI_HDR_EC, the outbound publish process can create the outbound message or flat file.

Before you can send invoices with the Billing Invoice EIP, you must:

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Types of Setup	Steps
Complete application setup	Associate customers receiving Billing Invoice Notice EIP messages with a preferred communication value of *XML Only* or *XML and Print*, and a document code of *Invoice*. The system provides these values as a default to the Standard Billing - Address Info page when you create a bill for this customer.
Complete Integration Broker setup	• Activate the BILLING_INVOICE_NOTICE service operation. • Verify the queue is in run mode. • Activate the handler. • Activate the routing. • Confirm the parameters of the routing definition. • Verify the node is active and connected to the correct network.
Complete Enterprise Component setup	• Activate the associated batch publish rule and specify the appropriate output for the message (an XML-based message or a flat file). If you are using message chunking, select a chunking rule ID. • If you are using message chunking, set up the chunking rule mapping definitions.

See Also

PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook, "Maintaining Contacts," Selecting Communication Preferences and Entering Contact Credit Card Information

PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook, "Assigning Publishing Rules"

Pages Used to Process Billing Invoices

Page Name	Object Name	Navigation	Usage
Contact	CONTACT	Customers, Contact Information	Maintain information about each contact.
Contact Customer	CONTACT_CUST_PAGE	Click the Contact Customer Information link on the Contact page.	Build the relationship between the contact and the different customer IDs the contact serves or is associated with. If the contact is only associated with one customer, enter that customer on this page. If the contact is a broker, for example, use this page to establish the relationships with the multiple customers that the broker serves. Set up security options on the Self Service Security tab.

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Page Name	Object Name	Navigation	Usage
Contact Additional Info	CONTACT_ADDTL_INFO	Click the Additional Info link for a contact on the Contact Customer page.	Enter the preferred communication method for the selected document.
Service Operations-General	IB_SERVICE	PeopleTools, Integration Broker, Integration Setup, Service Operations, General	Define and activate a service operation.
Service Operations-Handlers	IB_SERVICEHDLR	PeopleTools, Integration Broker, Integration Setup, Service Operations, Handlers	Activate one or more service operation handlers.
Service Operations-Routings	IB_SERVICERTNGS	PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings	Define and activate routing definitions on the service operation.
Routings-Parameters	IB_ROUTINGDEFNDOC	• PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings. Select the link attached to the routing definition name, then select the Parameters tab. • PeopleTools, Integration Broker, Integration Setup, Routings, Parameters	Verify the external service alias name, nodes, and transform programs used by this routing.
Queue Definitions	IB_QUEUEDEFN	• PeopleTools, Integration Broker, Integration Setup, Service Operations, General. Select the View Queue link attached to this service operation. • PeopleTools, Integration Broker, Integration Setup, Queues	Activate the queue used by the service operation.
Node Definitions	IB_NODE	PeopleTools, Integration Broker, Integration Setup, Nodes, Node Definitions	Activate node used by the service operation.
Nodes-Connectors	IB_NODECONN	PeopleTools, Integration Broker, Integration Setup, Nodes, Connectors	For an outbound service operation, verify the node is connected to the correct network.
Batch Publish Rules	EO_MSGPUBATCH	Enterprise Components, Integration Definitions, Batch Publish Rules	Activate the batch publish rule for the publication messages you create. This rule includes instructions on message chunking, if necessary.
Customer ID Chunk	OM_CHUNKCUSTID	SCM Integrations, Chunking Rule, CustID to Node Mapping	Set up chunking for the batch publish rule.

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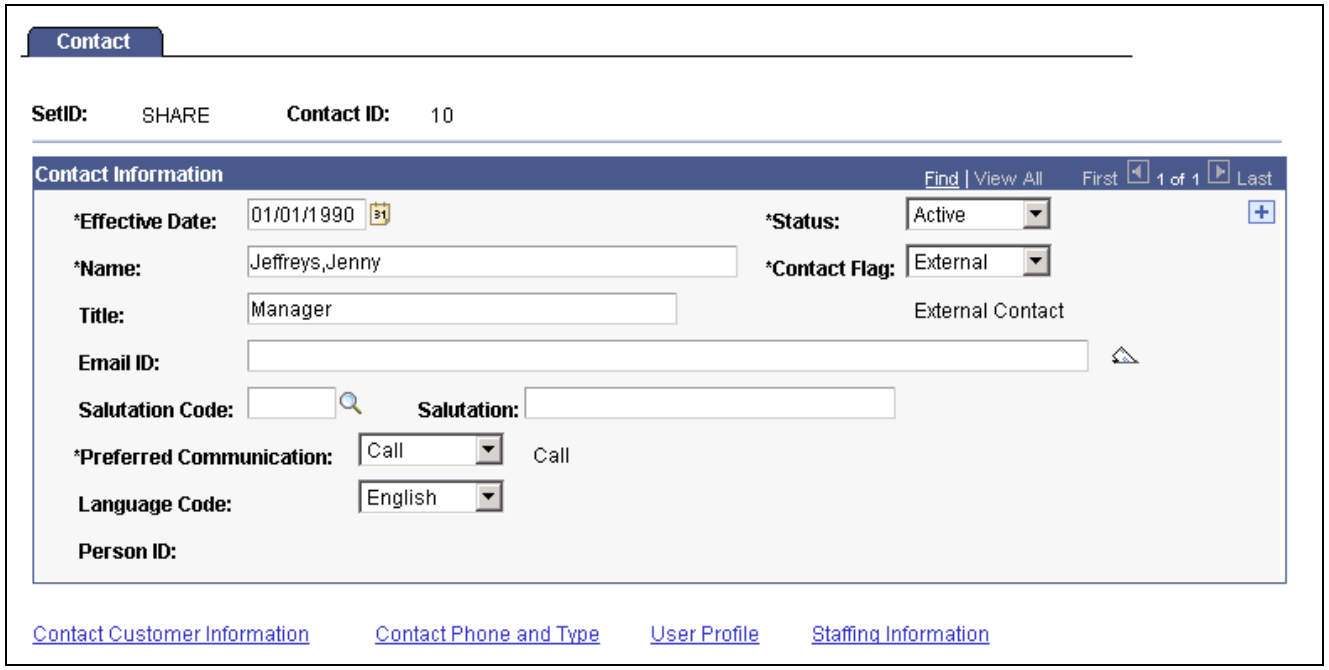
Verifying Contacts

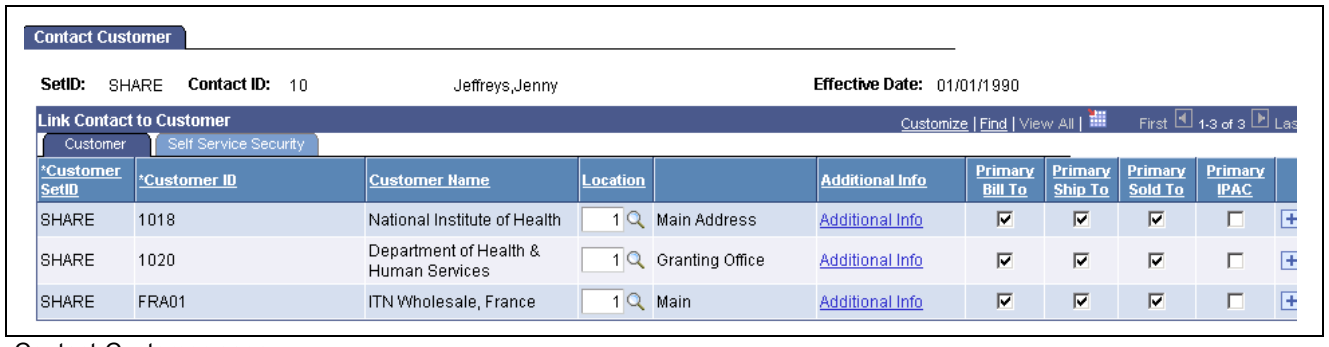
You must ensure that the customer you are interacting with has a contact set up to accept EDI transmissions, and that the contact is a ship to contact.

Access the Contact page using the Customer ID in the *correct history* mode.



Contact page

Access the Contact Customer page using the Contact Customer Information link on the Contact page.



Contact Customer page

Click the Primary Bill To check box to receive the proper invoice notifications.

Click the Additional Info link corresponding to the appropriate customer to access the Contact Additional Info page.

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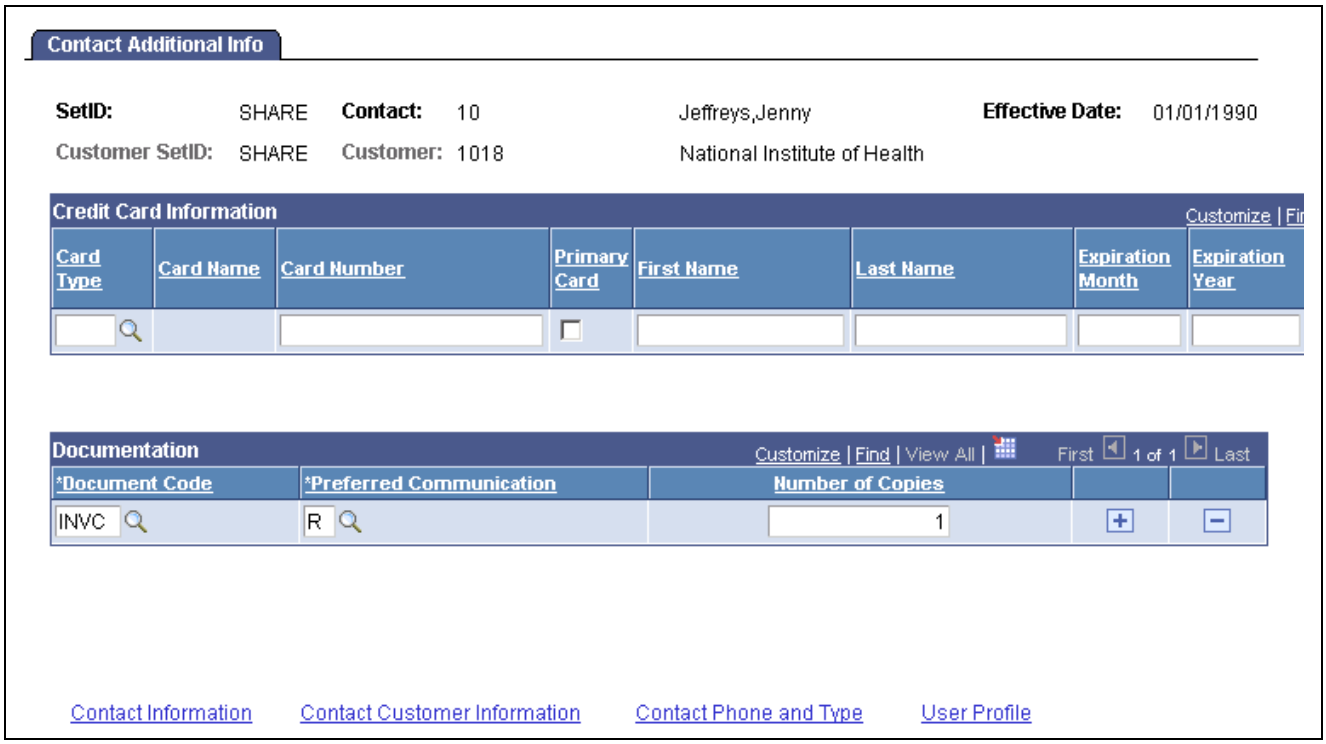

Contact Additional Info page

Under the Documentation group box, make sure the Document Code is *INVC* (invoice), and Preferred Communication is *R* (XML and Print) or *I* (XML only).

See Also

PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook, "Maintaining Contacts," Selecting Communication Preferences and Entering Contact Credit Card Information

Activating the Billing Invoice Notice Service Operation

Use the PeopleSoft Integration Broker to activate the Billing Invoice Notice service operation.

Access the Service Operations-General page.

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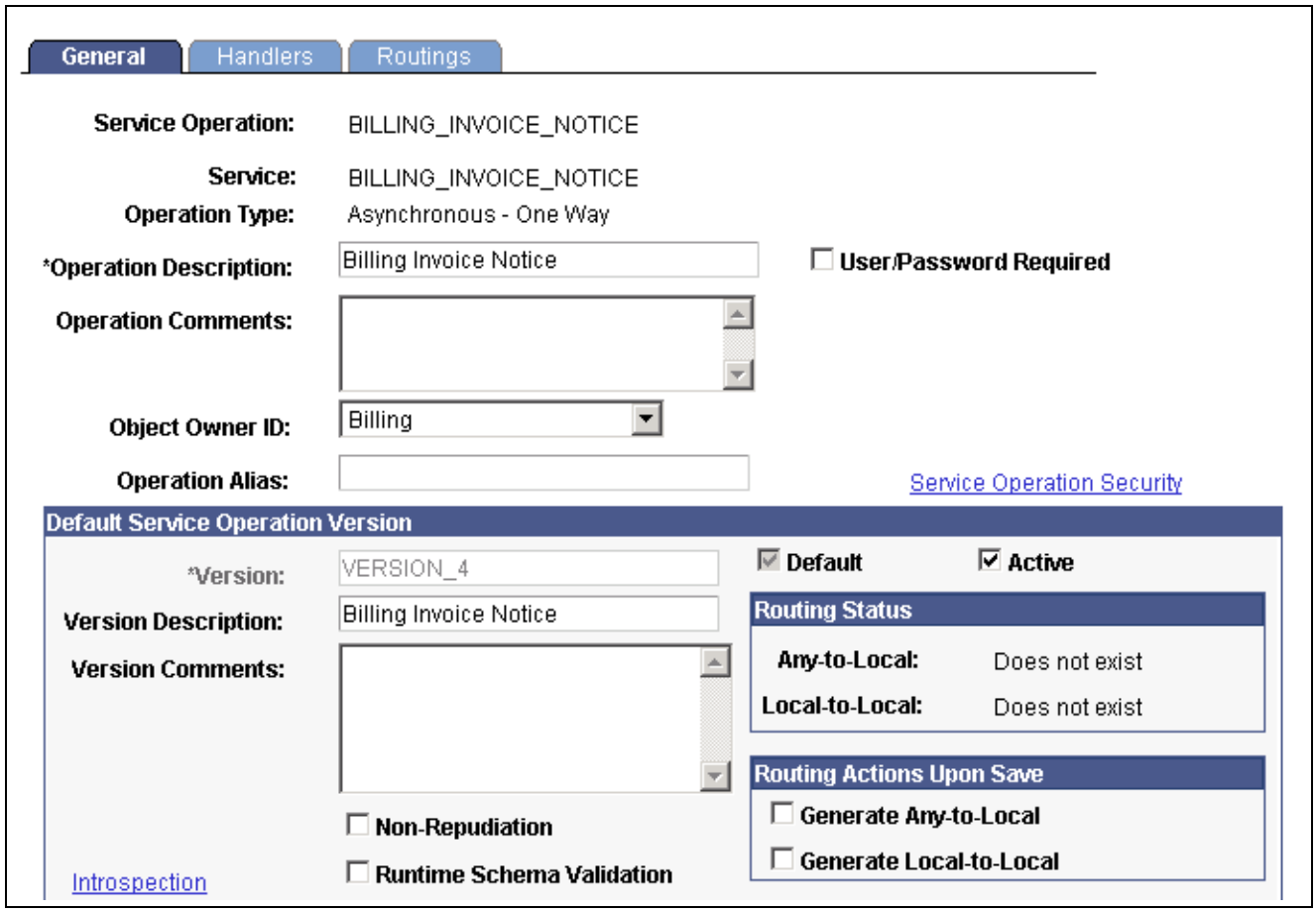
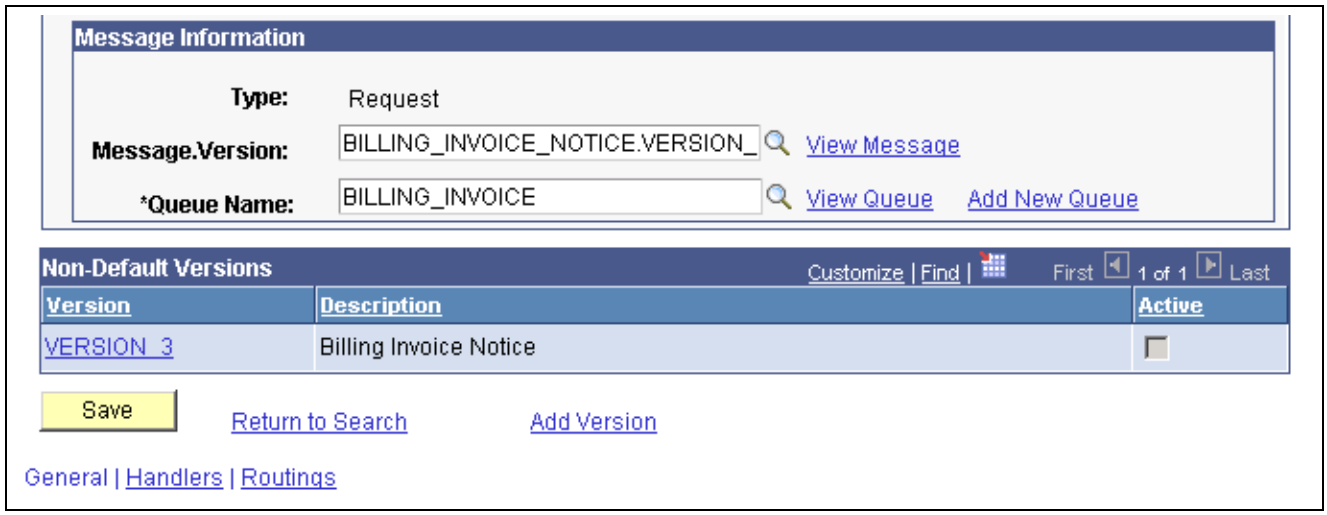


Service Operations-General page (1 of 2)



Service Operations-General page (2 of 2)

For the BILLING_INVOICE_NOTICE service operation, select the Active check box for the applicable service operation version. If the desired version is not the default version for the service operation, the default version must also be activated.

On the General tab of the Service Operations component, select the View Queue link at the bottom of the page to access the Queue Definitions page.

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Service Operation Versions

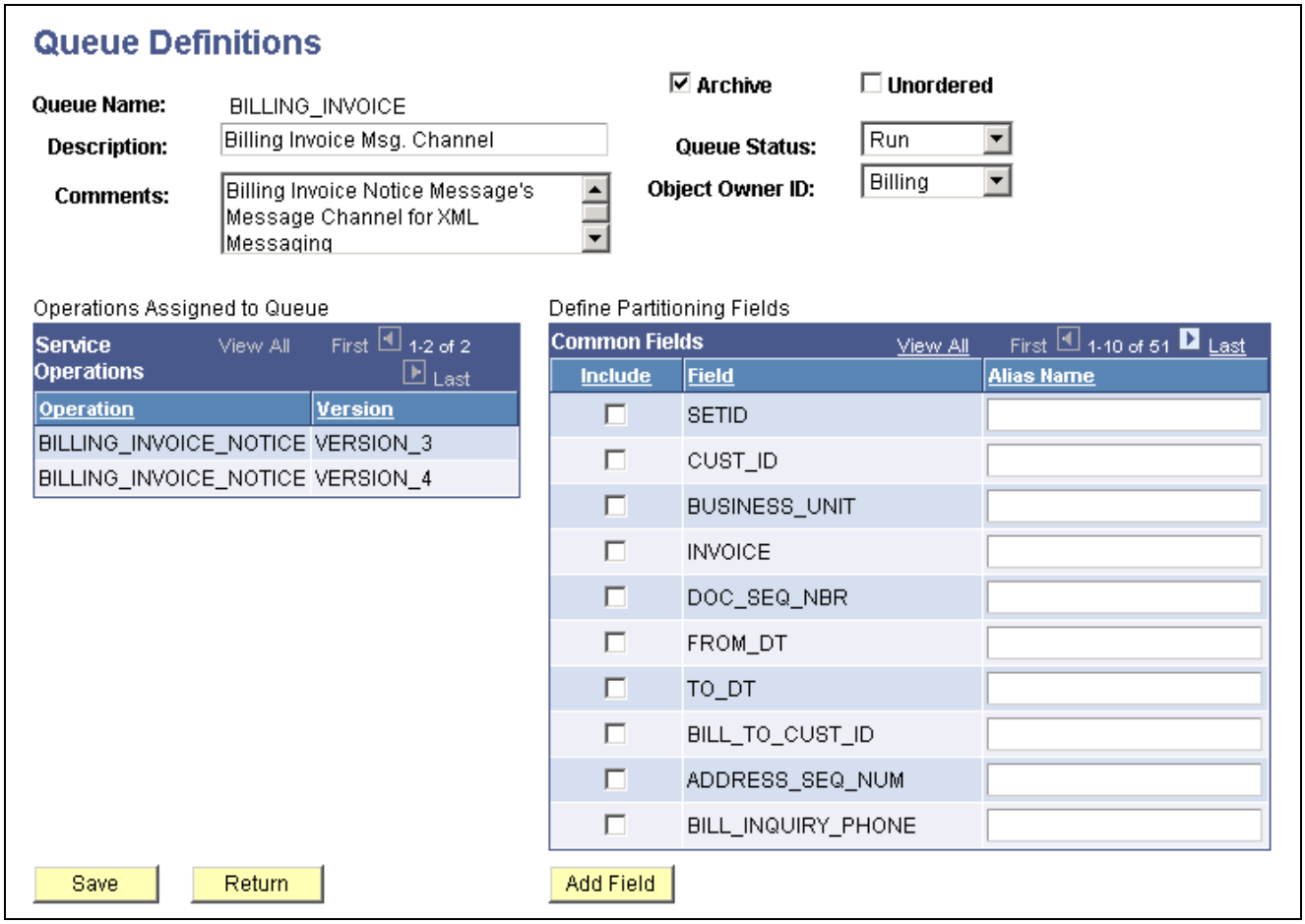
The Default Service Operation Version group box displays the most current version of this service operation. If there have been changes to the PeopleSoft application that have required the service operation to change, for example new fields or tables, then the Non-Default Versions group box displays any older versions of the service operation based on the older release of the PeopleSoft application. The default version is always the current version, however you can use a non-default version to communicate with third-party systems that want to receive the data based on an old version. Select the link in the Non-Default Versions box to access the Service Operation Version page. This page contains information about the non-default version, including message and queue. In addition, the Logical Transforms group box contains transforms to convert the data to or from the default version. A transform program is a type of PeopleSoft Application Engine program that can convert data from one format to another. Based on your environment, you will review and possibly change these transforms.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

Verifying the Queue is in Run Mode

Access the Queue Definitions page.



Queue Definitions page

For the BILLING_INVOICE queue, verify the Queue Status field has a value of *Run.*

Click the Return button to go back to the Service Operations component.

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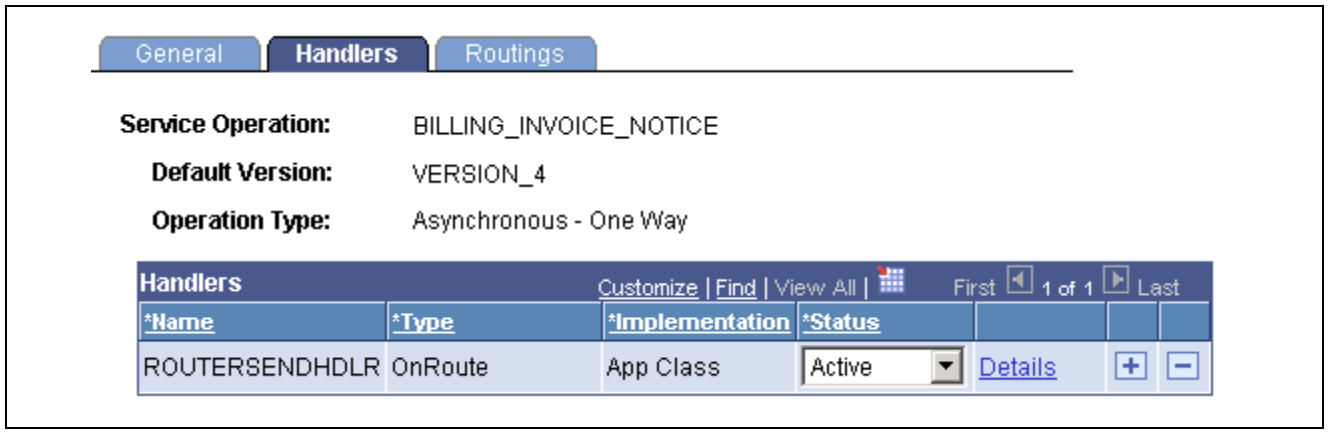
Activating the Handler

Access the Service Operations-Handlers page.

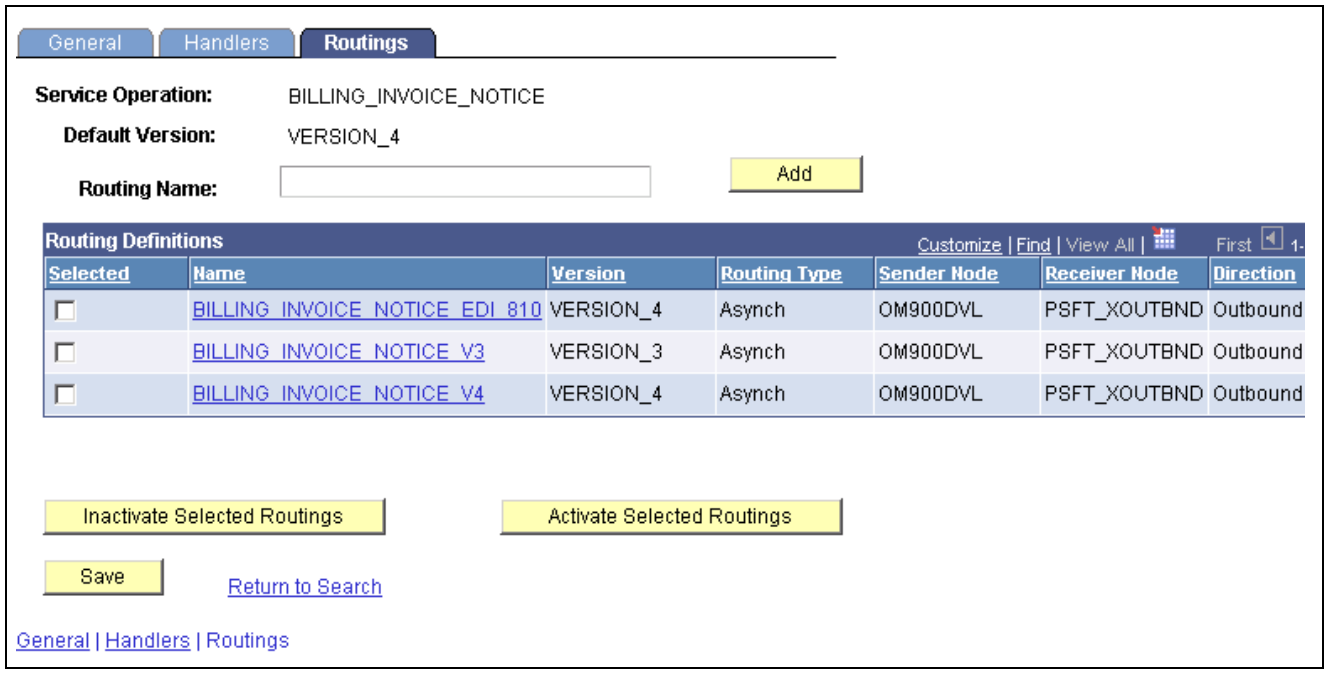


Service Operations-Handlers page

For the BILLING_INVOICE_NOTICE service operation, click the Handlers tab of the Service Operations component. If you want to use chunking, select the value of *Active* in the Status field for the OnRoute handler.

Activating the Routings

Access the Service Operations-Routings page.



Service Operations-Routings page

For the BILLING_INVOICE_NOTICE service operation, click the Routings tab of the Service Operations component. Activate an outbound routing definition for each receiver node and external alias name that data will be sent to. To activate a routing, select the check box next to the routing definition and click the Activate Selected Routings button. The following routing definitions are predefined:

- The BILLING_INVOICE_NOTICE_EDI_810 routing definition sends outbound invoices using the EDI X.12 810 format as a flat file. The data is converted from the PeopleSoft standard XML format to the EDI

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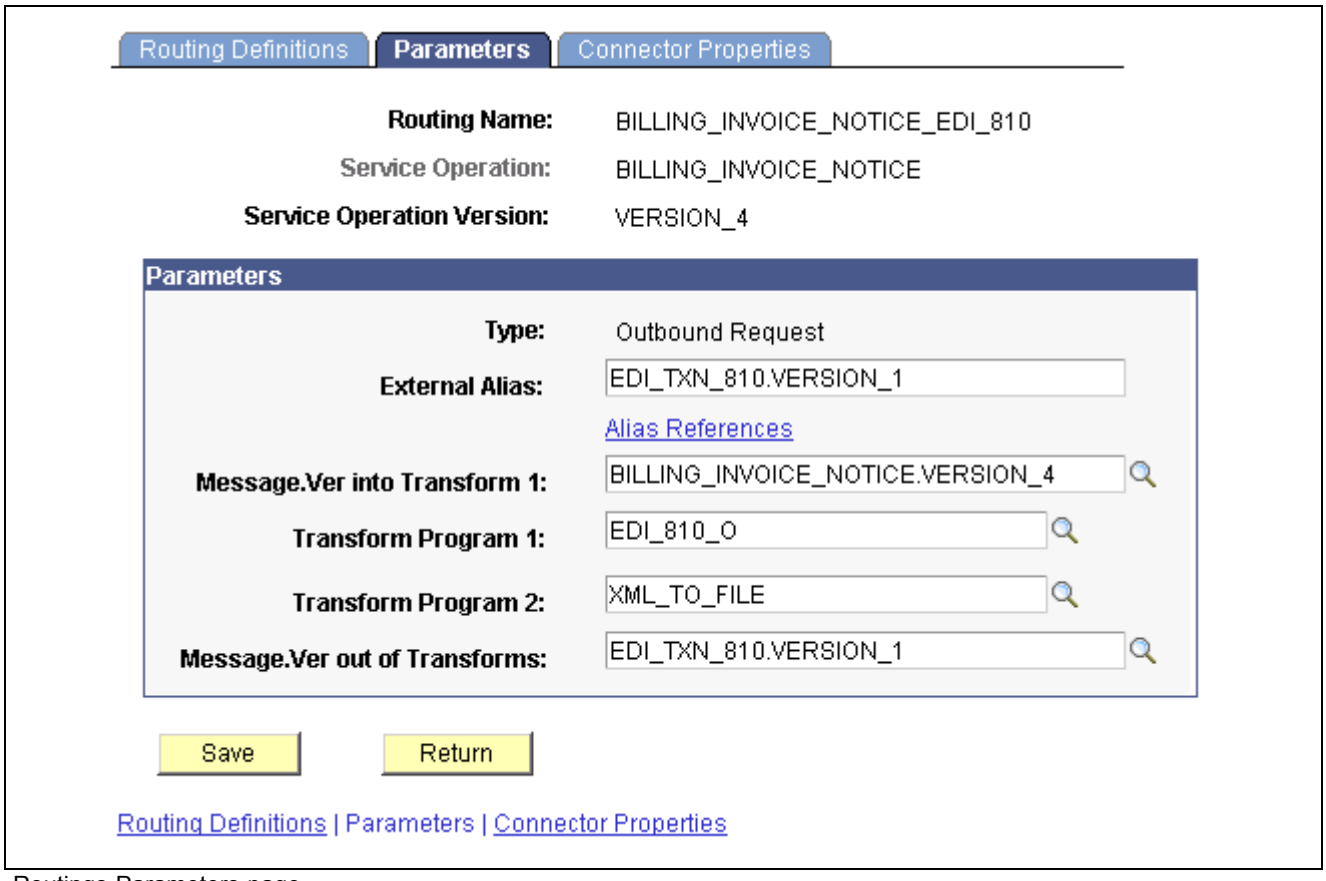
X.12 810 transaction format (still in XML) and then from XML to a flat file. If you wish to send the data as an XML file using the EDI X.12 810 format, then alter the routing definition to remove the second transform program.

- The BILLING_INVOICE_NOTICE_V3 routing definition sends outbound invoices using the PeopleSoft standard XML format and converts the data from the current service operation version (version 4) to an older version (version 3) of the service operation. This routing definition is used when you are sending data to a third-party system that is still using an older version of the service operation.
- The BILLING_INVOICE_NOTICE_V4 routing definition sends outbound invoices using the PeopleSoft standard XML format. This routing definition is used when you are sending data to a third-party system that is using the current version of the service operation.

Note. You do not need to select a routing definition if the batch publish rule is set up to post to a flat file only.

Confirming the Parameters of the Routing Definition

Access the Routings-Parameters page.



Routings-Parameters page

On the Routings tab of the Service Operations component, select the link attached to the routing definition name. This link accesses the Routing Definitions component. Select the Parameters tab and complete the following steps:

1. Confirm the external alias name in the External Alias field for the routing is correct. When sending or receiving data, the Integration Broker determines which routing to use by referring to the external alias name, not the routing name.

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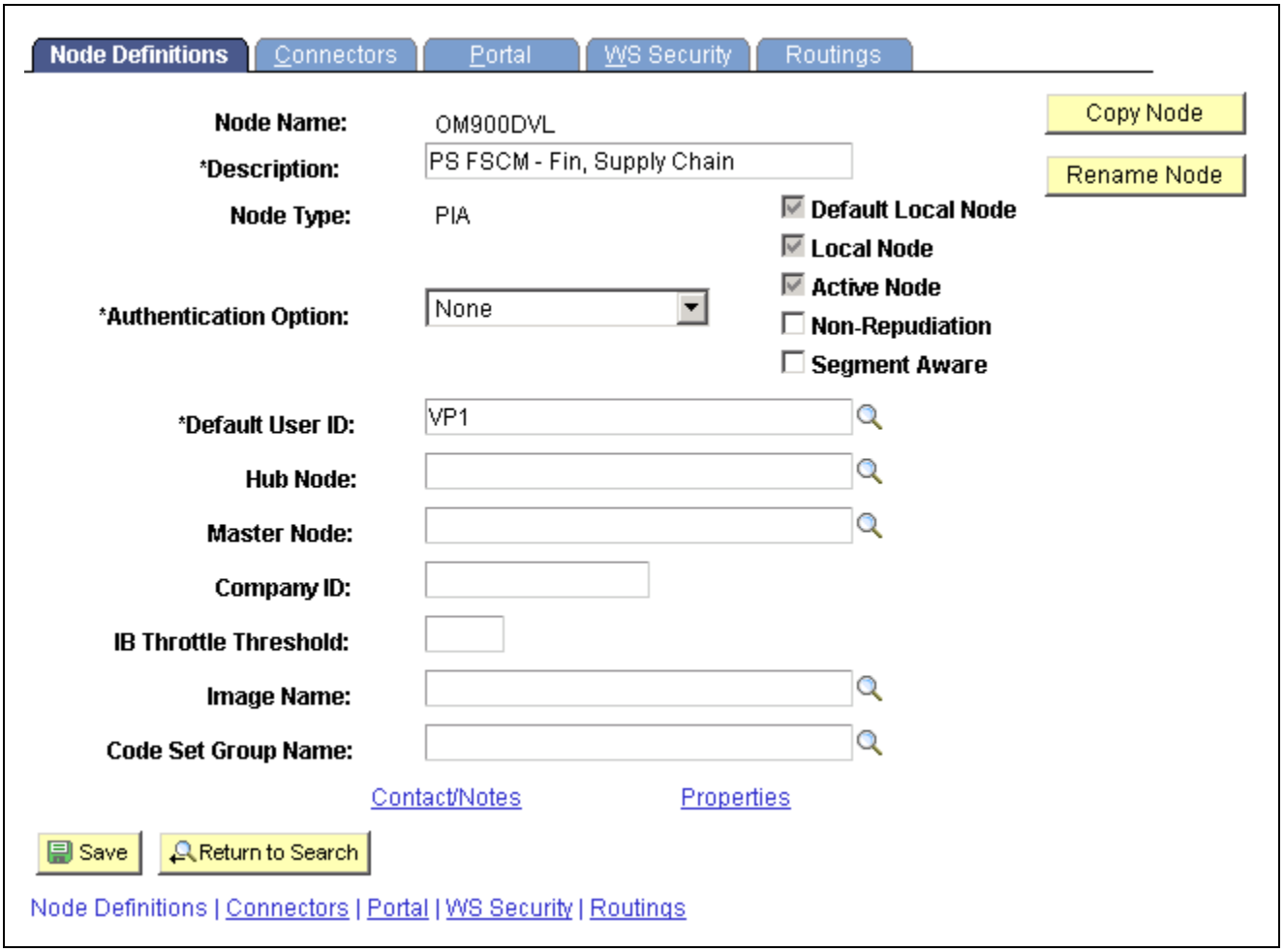
2. Verify or change the transform programs on this routing definition. A routing definition defines the sending and receiving nodes for a transaction and specifies any inbound and outbound transformations to invoke. A transform program is a type of PeopleSoft Application Engine program that can convert data from one format to another; for example, from XML to a flat file. Use a transform program when one node sends a request or response message with a data structure different from the structure required by the other node. You must decide, based on your environment, to change, remove, or add transform programs. The BILLING_INVOICE_NOTICE_EDI_810 routing definition is delivered with two transform programs. The EDI_810_O transform program converts outbound invoice data from the standard PeopleSoft XML format to the EDI X.12 810 transaction format (still in XML). The XML_TO_FILE transform program converts the EDI X.12 810 formatted data from XML to a flat file format. You can remove the XML_TO_FILE transform program to send your data in the XML EDI X.12 810 format. If you are not using EDI then you will want to use the BILLING_INVOICE_NOTICE_V4 routing definition instead.

   The transform program to convert data from the current version of a service operation to an older version is located on the Service Operation Version page of the non-default version. Select the non-default version on the Service Operations-General page to access the Service Operation Version page.

Verifying the Node is Active

Access the Node Definitions page.



Node Definitions page

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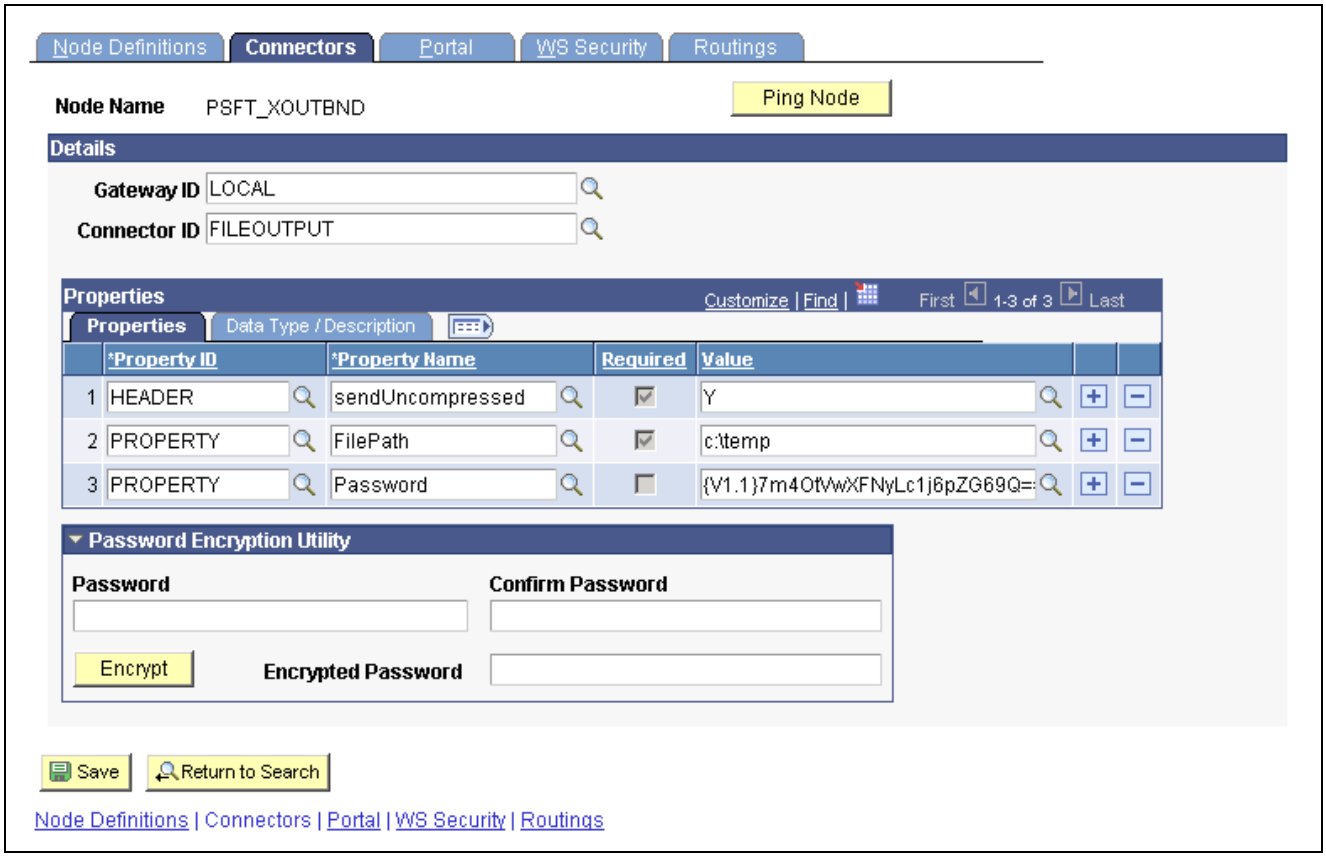
Verify the Active Node check box has been selected for any nodes used in the routings that you activated on the Service Operations-Routings page for BILLING_INVOICE_NOTICE service operation.

Verifying the Node is Connected to the Network

Access the Nodes-Connectors page.



Nodes-Connectors page

For an outbound service operation, verify the node or routing is connected to the correct network using the Gateway ID and Connector ID fields. Depending on the file output location, you may need a password. If a password is needed, you should use the password encryption utility on this page.

Note. Your database administrator will need to assist you with this setup.

Activating the Batch Publish Rule

Access the Batch Publish Rules page.

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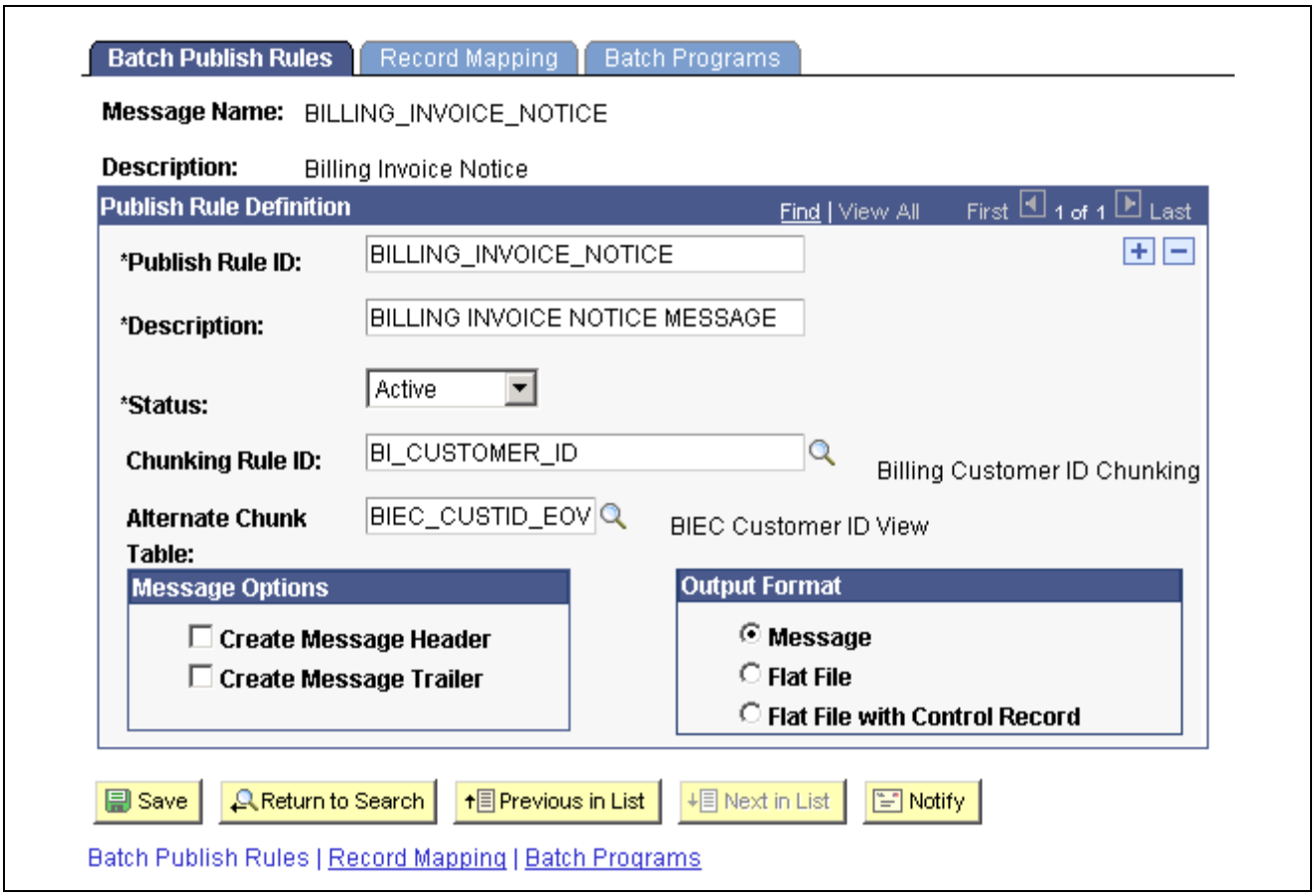

Batch Publish Rules page

For the BILLING_INVOICE_NOTICE message name (service operation):

1. Select *Active* Status to activate this publish rule definition for this message.
2. Select the appropriate Output Format.

   The PeopleSoft Application Engine program can create either an Extensible Markup Language (XML) message that flows through PeopleSoft Integration Broker or a flat file generated on the PeopleSoft Process Scheduler server and not published elsewhere.
3. If you want to use message chunking, configure a chunking rule and then enter it in the Chunking Rule ID field.

See Also

PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook, "Assigning Publishing Rules"

Setting Up Chunking for the Batch Publish Rule

Access the Customer ID Chunk page.

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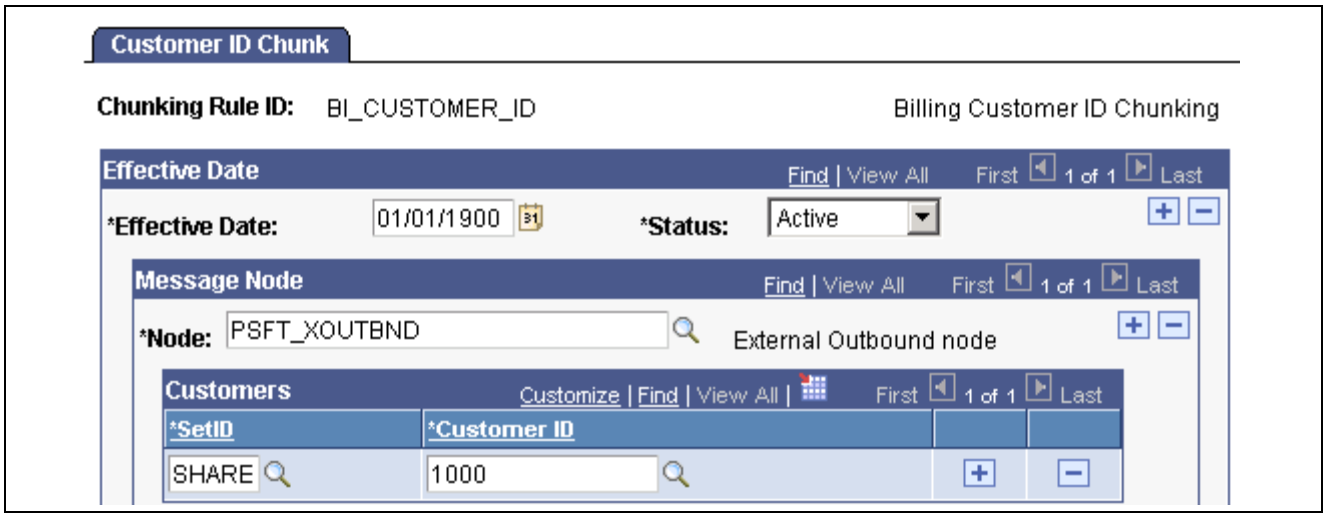

Customer ID Chunk page

If using chunking for the batch publish rule, set up the chunking rule mapping definitions. You can use a delivered chunking rule or create a new chunking rule.

The BI_CUSTOMER_ID chunking rule ID is delivered as an optional chunking rule for the Billing Invoice Notice batch publish rule. To use this chunking rule, access the Customer ID Chunk page.

Select the node for each customer that receives electronic invoice notifications.

Chunking is only needed if you have requirements to break up the outbound data and send them to different destinations based on attributes in the message such as business unit or customer ID. For example, use chunking to send a single customer's messages to a specific node setup for that trading partner. If you are using a middleware product to actually determine trading partner destinations then a single transaction with all trading partner transactions can usually be sent directly to the middleware product. You would not need to activate message chunking in this situation.

See Also

Chapter 3, "Implementing Integrations," Setting Up Chunking, page 88

Publishing Billing Invoices

This section discusses how to publish billing invoices.

See Also

PeopleSoft Enterprise Billing 9.0 PeopleBook, "Processing EDI Transactions in PeopleSoft Billing"

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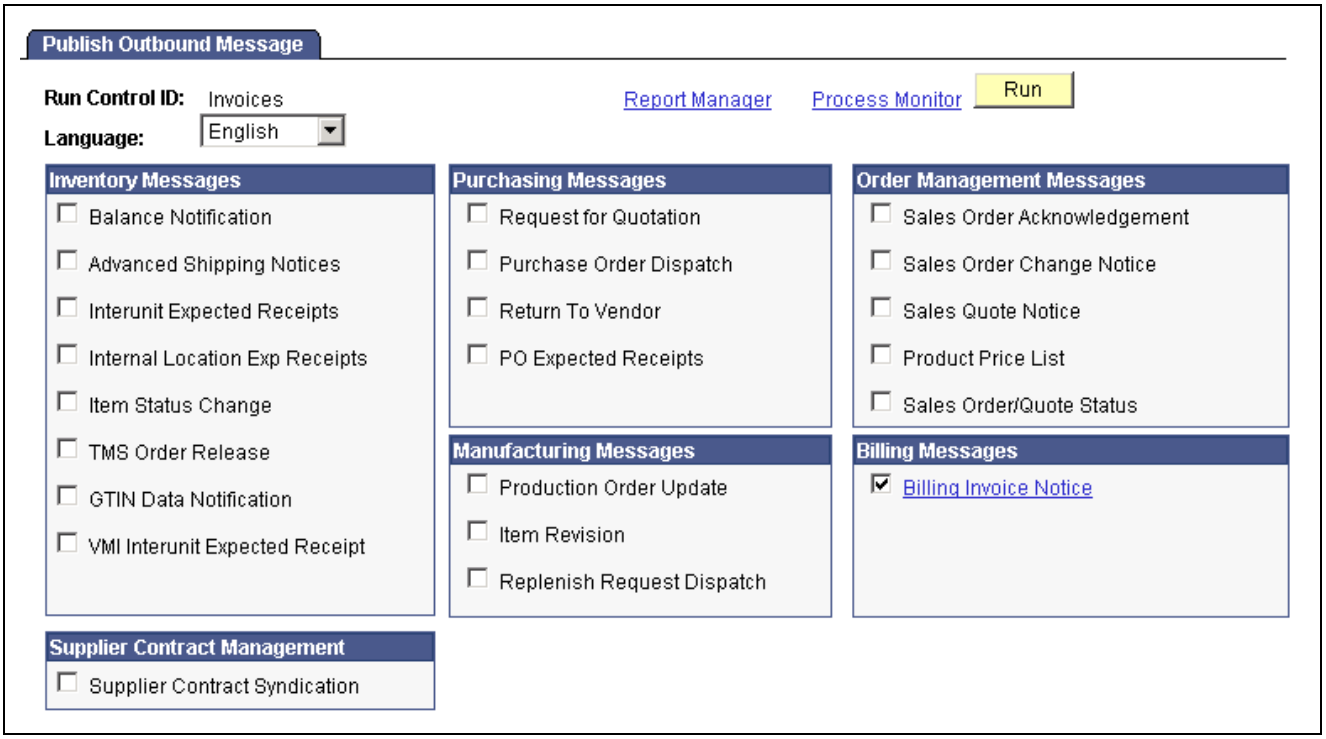
Pages Used to Process the Billing Invoice EIP

Page Name	Object Name	Navigation	Usage
Publish Outbound Message	IN_RUN_PUB_MSG	SCM Integrations, Publish Outbound Message	Initiate the outbound message publish process for outbound SCM messages that use the batch publish design pattern.
Billing Invoice Notice Message Selection Criteria	BI_INVMSG_SEL_PNL	Select Billing Invoice Notice on the Publish Outbound Message page to enable the Billing Invoice Notice link. Click the Billing Invoice Notice link to launch the Billing Invoice Notice Message Selection Criteria page.	Launch the Billing Invoice Notice outbound transaction.

Publishing Billing Invoices

Access the Publish Outbound Message page.



Publish Outbound Message page

Select the Billing Invoice Notice check box, and click the Billing Invoice Notice link to access the Billing Invoice Notice Message Selection Criteria page.

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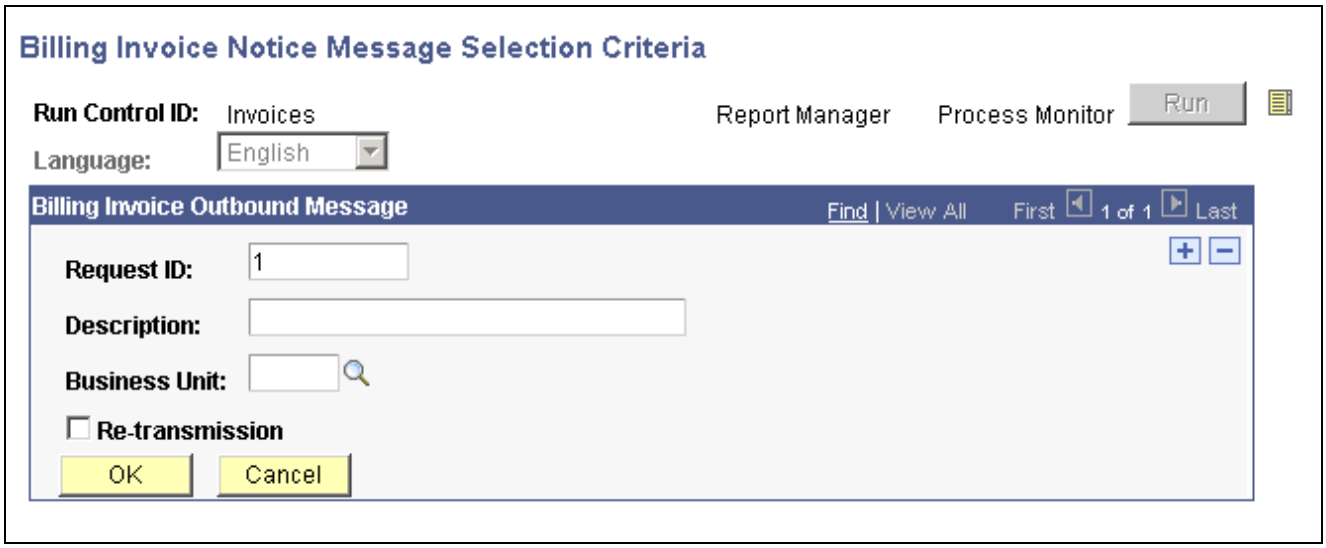

Billing Invoice Notice Message Selection Criteria

Enter a Request ID, Description, and Business Unit.

Re-transmission Select to indicate that you want to re-transmit selected invoices.

When the Publish Outbound Message process completes, it clears the BI_HDR_EC table. If you need to re-transmit invoices, the Re-transmission check box is available on this page. When you select this check box, additional selection fields appear on the page. The system rewrites the specified invoices to the BI_HDR_EC table, which is processed and transmitted again.

See Also

http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

PeopleSoft Enterprise Billing 9.0 PeopleBook, “Processing EDI Transactions in PeopleSoft Billing”

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PART 3

Integrating to Warehouse Management Systems

Chapter 6
Understanding Warehouse Management Systems

CHAPTER 6

Understanding Warehouse Management Systems

This chapter discusses:

- General warehouse management system (WMS) integration issues.
- WMS enterprise integration points (EIPs).
- The order-to-cash business process in a WMS integration.
- The procure-to-pay business process in a WMS integration.
- Four-wall warehousing functions in a WMS integration.
- Static information updates in a WMS integration.

General WMS Integration Issues

This section discusses system-wide assumptions about WMS integration.

Integrating PeopleSoft with a third-party WMS enables you to streamline the order-to-cash and procure-to-pay business processes. This streamlining enables you to reduce costs, improve service levels, and generate more revenue.

You can integrate the following products with a WMS:

- PeopleSoft Purchasing.
- PeopleSoft Payables.
- PeopleSoft Order Management.
- PeopleSoft Inventory.

The integration consists of generic EIPs using service operations in PeopleSoft Integration Broker to exchange transactional and static data between the PeopleSoft system and the WMS. Transactional data relates to order processing and material management. Static data relates to customers, items, carriers, and locations.

System-Wide Assumptions About WMS Integration

The WMS integration works as designed only if you understand certain system-wide assumptions and your system complies with them. The following sections discuss these assumptions.

Business Units

One WMS installation corresponds to one PeopleSoft Inventory business unit. When defining the PeopleSoft Inventory business unit in the PeopleSoft system, you specify that the business unit is under external warehouse control on the Inventory Definition - Business Unit Options page.

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Static Information

All static information, such as customer, vendor, carrier, and item information, is maintained in the PeopleSoft system. Updates are sent to the WMS when new information is added or changes are made to existing information. Changes made to this information within the WMS are not sent back to the PeopleSoft system.

Quantity Balance Data

The WMS drives all inventory balances. The WMS sends material movement transactions to the PeopleSoft system. Any material movement transactions initiated in the system are *not* sent to the WMS. If the WMS is not manually updated to reflect a material movement transaction performed in the PeopleSoft system, quantity balance data between the two systems will not agree.

Open and Hold Stock Status Attributes

The PeopleSoft system does not need to track on-hand quantity balances at the material storage location level because all material movement transactions occur within the WMS. In most cases, quantity balances in the PeopleSoft system can be maintained at the business-unit level by using the *Open* or *Hold* stock status attributes to determine which stock is available to fulfill orders. In this balance structure, you can use the PeopleSoft material storage location balance record, PHYSICAL_INV, to maintain the *Open* and *Hold* quantity balances. Two storage location balance records are created in PHYSICAL_INV: one for stock quantity with an *Open* status and another for stock quantity with a *Hold* status.

When determining whether to use this structure or a more detailed balance structure, take the following considerations into account:

- Material storage locations can have a status of only *Open* or *Hold.*

  Inventory status values of *Restricted* and *Rejected* are not used in a WMS integration. You should always initiate status updates in the WMS. Status changes made using the Inventory Status page or the Lot Control Information page in PeopleSoft Inventory are not reflected in the WMS and may cause discrepancies between the available (that is, *Open*) and unavailable (or *Hold*) quantity balances in the two systems.

- The status update data that the WMS sends to the PeopleSoft system does not directly change the status of stock.

  Instead, the WMS reports a material storage location stock transfer in which the stock is moved to a location with the appropriate status, *Open* or *Hold*. The Inventory Transfer EIP (the EIP used to send status update data to PeopleSoft) is designed with the assumption that the *Open* or *Hold* status of a material storage location is handled in the WMS mapping logic to support the status update transaction. If the WMS implementation uses the material storage location fields in PeopleSoft Inventory for purposes other than tracking *Open* and *Hold* balances, these fields must be accounted for in the mapping logic.

- All key fields related to item definition in the PeopleSoft Inventory material storage location balance table, PHYSICAL_INV, are supported for transactions that allow entry of the item ID.

  These fields include the business unit, item, staged date, lot ID, serial ID, container ID, and unit of measure. If you want to maintain a breakdown of balances at a lower level than the item ID (for example, at the lot ID or serial ID level), all transactions entered against these balances must contain all item definition keys.

- Modifications to the check boxes on the Material Storage Locations page in PeopleSoft Inventory can affect available balances for items in that location.

  Changes made to these settings are not reflected in the WMS and may cause discrepancies in the available and unavailable quantity balances between the two systems.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, “Managing Inventory Status”

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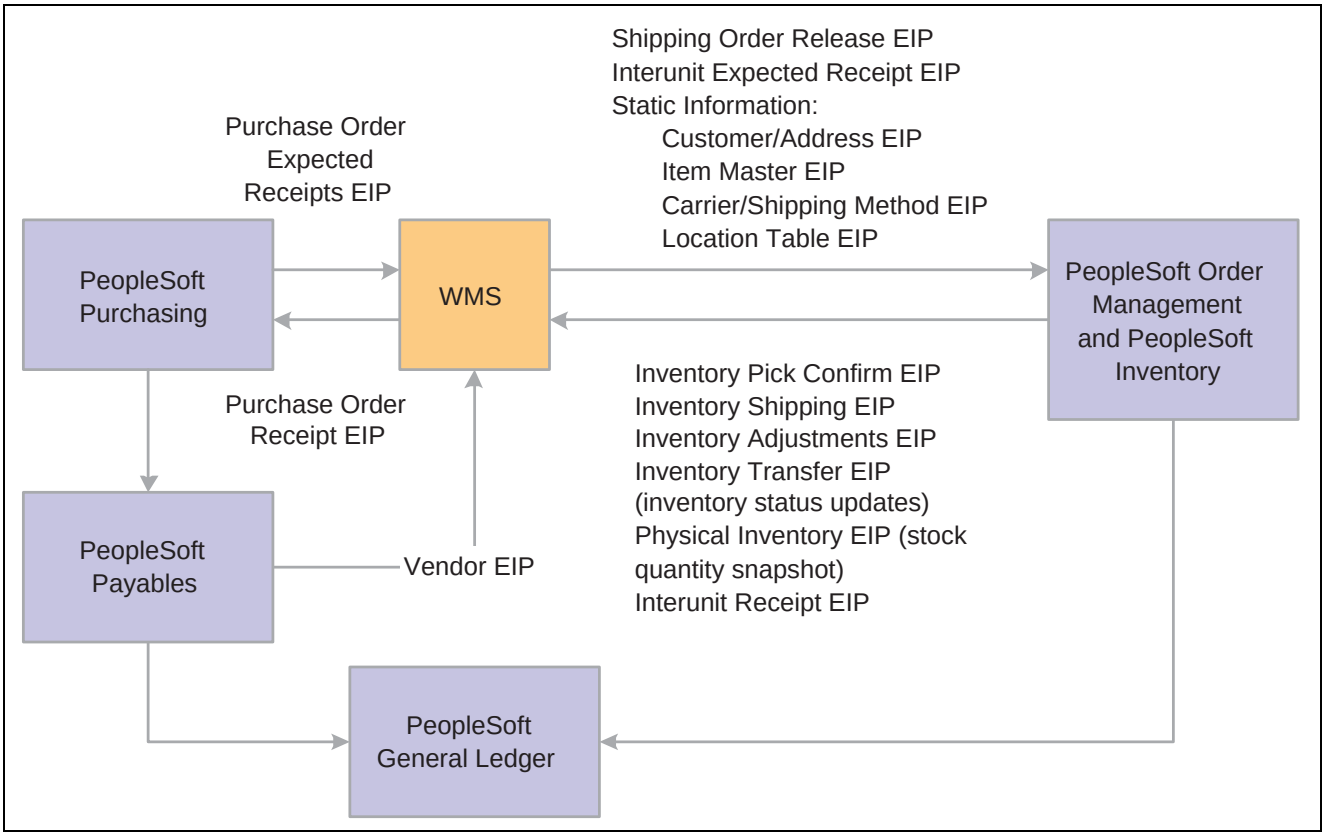
WMS EIPs

The EIPs used to exchange data between the PeopleSoft system and a WMS are service operations defined within PeopleSoft Integration Broker.

The following diagram illustrates the data flow in a WMS integration:



PeopleSoft and warehouse management system integration

The following sections describe the information that each EIP provides.

PeopleSoft Purchasing

The EIPs within PeopleSoft Purchasing are:

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EIP Name	Description
Purchase Order Expected Receipt EIPs (outbound)	Provides the WMS with a list of expected receipts that have not been received for a dispatched purchase order. This integration point includes the following service operations; PO_EXPECTED_RECEIPT_SHIPTO and the PO_EXPECTED_RECEIPT_BUS_UNIT.
Purchase Order Receipt EIP (inbound)	This service operation updates the status of purchase order receipts in the PeopleSoft system to indicate whether the quantity on the receipt has been received in the WMS system.

PeopleSoft Order Management and PeopleSoft Inventory

The EIPs within PeopleSoft Order Management and PeopleSoft Inventory are:

EIP Name	Description
Shipping Order Release EIP (outbound)	This service operation provides the WMS with details of orders that have been released for picking and shipment.
Interunit Expected Receipt EIP (outbound)	This service operation notifies the WMS that an interunit stock transfer has been shipped to it from another PeopleSoft Inventory business unit.
Customer/Address EIPs (outbound)	Updates the customer and address information in the WMS with the current information in the PeopleSoft system. There are several service operations in this category, starting with CUSTOMER.
Item Master EIPs (outbound)	Updates item master, item business unit attributes, purchasing item attributes, item unit of measure, and item revision information in the WMS with the current information in the PeopleSoft system. There are several service operations in this category, starting with ITEM.
Carrier/Shipping Method EIPs (outbound)	Updates carrier and shipping method information in the WMS with the current information in the PeopleSoft system. There are several service operations in this category, starting with CARRIER.
Location Table EIPs (outbound)	Updates internal ship to location data in the WMS with the current information in the PeopleSoft system. There are several service operations in this category, starting with LOCATION.

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EIP Name	Description
Inventory Pick Confirm EIP (inbound)	This service operation reports picking and shipping activities to the PeopleSoft system.
Inventory Shipping EIP (inbound)	This service operation reports picking and shipping activities to the PeopleSoft system.
Inventory Adjustment EIP (inbound)	This service operation reports adjustments in stock quantity balances to PeopleSoft.
Inventory Transfer EIP (inbound)	This service operation reports transfers of stock quantity between material storage locations. In a WMS integration, this data is used by the WMS to modify the inventory status in PeopleSoft Inventory to *Open* or *Hold*. The stock quantity is logically transferred to a location with the appropriate status.
Physical Inventory EIP (inbound)	This service operation reports cycle counting and complete physical inventory activities. In a WMS integration, this data is used to synchronize the quantity balances between the two systems. PeopleSoft Inventory processes this data as a stock quantity update from a counting event.
Interunit Receipt EIP (inbound)	This service operation updates the status of interunit receipts in PeopleSoft to indicate whether the quantity on the receipt has been received in the WMS system.

Note. In prior releases of PeopleSoft Inventory, the Shipping Notification EIP was used to send back picking and shipping details from the WMS system. The Shipping Notification EIP is available for backwards compatibility to earlier releases. However, if you are currently implementing the integration point between PeopleSoft Inventory and a WMS, use the Inventory Pick Confirm EIP and the Inventory Shipping EIP instead of the Shipping Notification EIP.

PeopleSoft Payables

The EIPs within PeopleSoft Payables are:

EIP Name	Description
Vendor EIPs (outbound)	Updates the WMS with the current data from the vendor table and its related tables in the PeopleSoft system. There are several service operations in this category, starting with VENDOR.

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PeopleSoft General Ledger

PeopleSoft General Ledger is not directly integrated with the WMS. Instead, it is updated by transactions in PeopleSoft Payables, PeopleSoft Order Management, and PeopleSoft Inventory.

See Also

Chapter 2, "Understanding PeopleSoft Supply Chain Management Enterprise Integration Points," page 9

Chapter 6, "Understanding Warehouse Management Systems," The Order-to-Cash Business Process in a WMS Integration, page 194

Chapter 6, "Understanding Warehouse Management Systems," The Procure-to-Pay Business Process in a WMS Integration, page 199

Chapter 6, "Understanding Warehouse Management Systems," Four-Wall Warehousing Functions in a WMS Integration, page 204

Chapter 6, "Understanding Warehouse Management Systems," Static Information Updates in a WMS Integration, page 206

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Managing Inventory Status"

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Counting Inventory Stock"

The Order-to-Cash Business Process in a WMS Integration

This section discusses:

- Order entry.
- Reservation processing.
- Order release processing.
- Order changes.
- Shipping processing.

The order-to-cash business process enables companies to sell their goods and services to customers. Here is an overview of the process in a WMS integration:

1. PeopleSoft components are used to take the customer orders, reserve the orders against available quantity balances, and release the orders to the WMS.
2. In the WMS, the orders are picked, packed, and shipped to the customer.
3. PeopleSoft provides shipment tracking, advanced shipment notice transactions, costing, accounting, invoicing, and cash collection functions.

Order-to-Cash Process Flow in a WMS Integration

The following diagram shows how order-to-cash functions are performed in a WMS integration:

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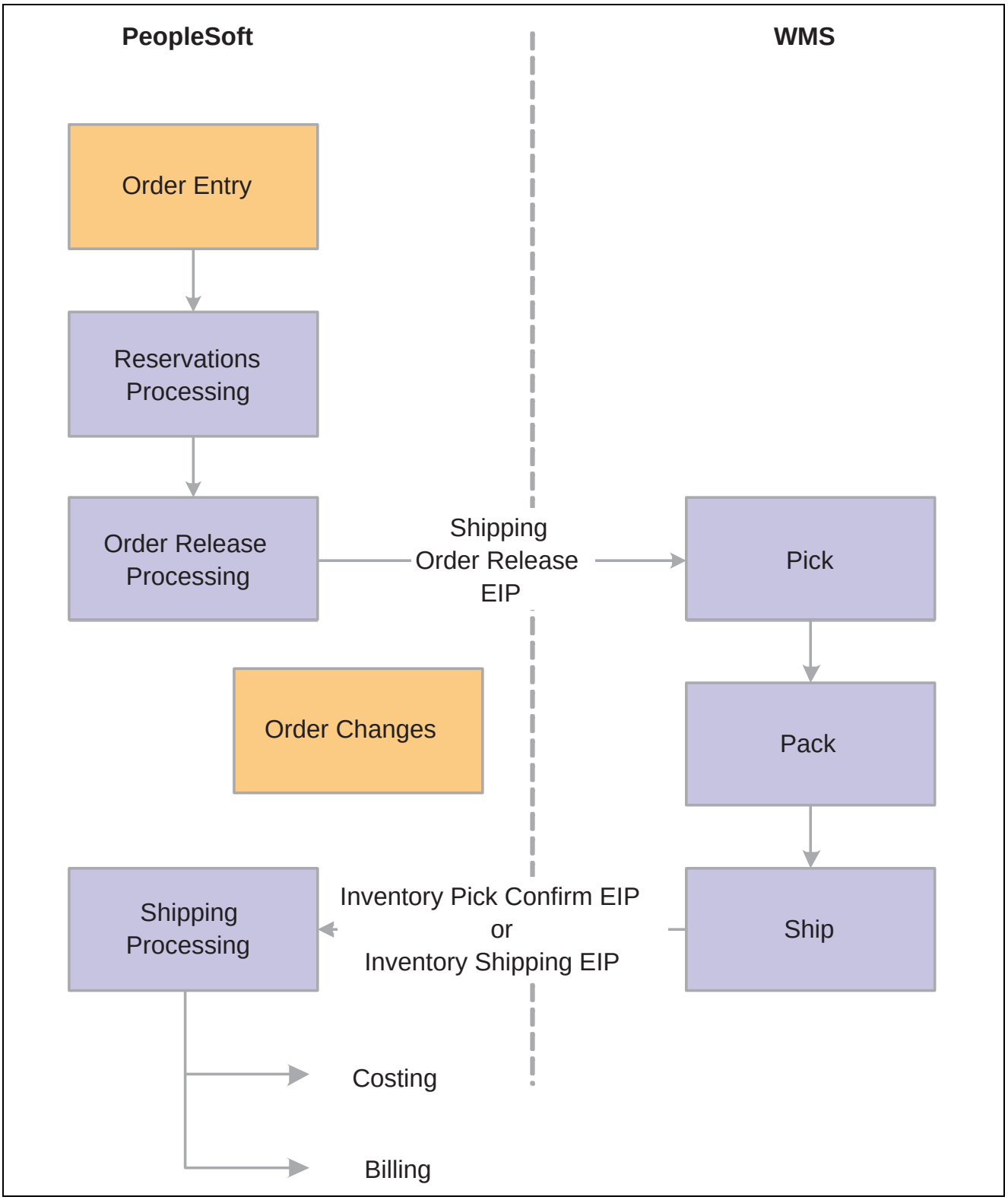

Order-to-cash processing

The EIPs that support the order-to-cash business process in a WMS integration are based on a number of assumptions. The following sections detail the assumptions for each phase of the order-to-cash business process.

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Order Entry

In a WMS integration, orders are captured and staged for fulfillment in PeopleSoft tables. PeopleSoft Inventory enables you to capture demand for stock from many sources, including sales order entry functions in PeopleSoft Order Management and material stock requests accepted from other PeopleSoft business units and third-party applications.

Regardless of demand source, all orders that are staged for fulfillment in the PeopleSoft Inventory the demand fulfillment table, IN_DEMAND, can be processed in a WMS. However, orders issued with the Creating Express Issue Stock Requests in PeopleSoft Inventory cannot be processed in a WMS. Express issue orders bypass picking, packing, and shipping functions are directly inserted into the PeopleSoft Inventory history table, TRANSACTION_INV.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Creating Orders for Fulfillment"

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Understanding Order Fulfillment Processing"

PeopleSoft Enterprise Order Management 9.0 PeopleBook, "Introduction to Sales Order Entry"

Reservation Processing

Before the order can be released for picking in a WMS, the demand line must set to the *releasable* fulfillment state by reservation processing in PeopleSoft Inventory. A demand line can be set to the releasable state with soft-reserve, ATP promise, pre-allocation, or just released downstream for picking. A demand line could be fully or partially backordered by the reservation process.

Pre-allocations

Pre-allocations are a hard allocation of quantity at the material storage location level when orders are in the unfulfilled state. Pre-allocations include hard allocations created by the pegging feature and lot-allocations. In PeopleSoft Inventory, the Order Release Request process is run to generate the Shipping Order Release EIP. This service operation sends the hard allocations to the WMS . If PeopleSoft Inventory receives a transfer transaction for a pre-allocated item from the WMS, the transaction is rejected because allocated material cannot be transferred. Do not use pre-allocation processing if the WMS implementation has procedures that require transferring material from a material storage location to a shipping area before sending data using the Inventory Pick Confirm EIP or the Inventory Shipping EIP.

Back Orders

If back orders are permitted for orders, the back order processing takes place in PeopleSoft Inventory. Back order functionality in the WMS is not used in a WMS integration. If you allow order lines to ship with partial quantities, demand lines with the available portion of the requested quantity are inserted into IN_DEMAND, where they can be released for picking in the WMS.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Promising and Reserving Inventory"

Order Release Processing

In a WMS integration, running the Order Release process in PeopleSoft Inventory releases eligible orders to the WMS to be picked, packed, and shipped. For PeopleSoft Inventory business units under external warehouse control, the Order Release process using the Shipping Order Release output option, sends the order data to the WMS using the Shipping Order Release EIP.

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The sort selections available from the Additional Options page of the Order Release process do not control the sequence of the orders in the Shipping Order Release service operation. The order data sent to the WMS is separated into logical orders based on breaks in the following sort sequence:

1. Business unit.
2. Demand source.
3. Source business unit.
4. Order number.
5. Customer ID.
6. Ship to ID.
7. Address sequence code.
8. Carrier ID.
9. Ship via.

Note. If the Ship Using TMS Reference ID check box is selected on the Inventory Definition page then the orders released to the WMS system will be set up and sorted using the TMS Reference ID and TMS Reference ID Line Number.

Note. If the address information for an order is modified before order release, the address fields are added to the sort sequence.

For each logical order, there is a single order header that contains the address and shipping information for the order. The Order Release process assigns an external reference number to the order header. For each Order Release process run, the external reference numbers are assigned to order headers sequentially starting with *1*. This number is also referenced on each demand line associated with the order header and can be viewed on the Stock Requests Inquiry page. The combination of the external reference number and the pick batch ID provides a unique key that the WMS uses to identify a specific order release transaction.

The data sent by the Shipping Order Release service operation contains detailed information for each line on the order, including details of quantities allocated to specific items and material storage locations. Lot detail for lot-allocated demand lines is always provided; however, quantity allocation for push picking plans is provided on an optional basis only.

The order release transaction in a WMS integration is the same for both pull and push picking plans. However, if you use a push picking plan (Create Allocations action on the Order Release process page), the quantities are allocated at the material storage location level. If PeopleSoft Inventory receives a transfer transaction for an allocated item from the WMS, the transaction is rejected because allocated material cannot be transferred. Push picking plans should not be used if the WMS implementation has procedures that require transferring material from a material storage location to a shipping area before sending the data using the Inventory Pick Confirm EIP or the Inventory Shipping EIP.

To delete an order line from a pick batch ID, you must manually delete the line in both PeopleSoft Inventory and the WMS. To delete the order line in PeopleSoft Inventory, use the Material Picking Feedback page. (This is the only circumstance in which the Material Picking Feedback page is used in a WMS integration.) If you do not also delete the order line in the WMS system and the line is returned to PeopleSoft Inventory on an Inventory Pick Confirm EIP or an Inventory Shipping EIP, the line is rejected because it is no longer associated with the order.

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The Shipping Order Release EIP does not include substitute item detail as provided on picking plans in PeopleSoft Inventory. However, all other notes tied to a picking plan are included in this data. In addition, the Shipping Order Release EIP includes any notes associated with the bill of lading to support WMSs that print their own bills of lading.

See Also

Chapter 2, "Understanding PeopleSoft Supply Chain Management Enterprise Integration Points," page 9

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Picking Inventory"

Order Changes

In general, once an order is released to the WMS, any changes made to the order in either the WMS or in the PeopleSoft system must be manually communicated between the two systems. The PeopleSoft system does not send any order change information to the WMS. Changes made to the order shipping information in the WMS for the carrier, shipping method, and freight terms are sent to the PeopleSoft system as part of the Inventory Pick Confirm EIP or the Inventory Shipping EIP. Any other order changes made in the WMS, however, must be manually duplicated in the PeopleSoft system.

You can cancel an order line at any time until the order line has the status *Shipped* in PeopleSoft Inventory. However, in a WMS integration, first cancel the order in the WMS and then cancel the order in the PeopleSoft system using the Cancel/Hold Stock Request page. If an order canceled in PeopleSoft Inventory is actually shipped in the WMS, PeopleSoft Inventory rejects the transactional data from the Inventory Pick Confirm EIP or the Inventory Shipping EIP received from the WMS. You cannot reverse an order cancellation in PeopleSoft Inventory.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Changing, Canceling, and Holding Orders"

Shipping Processing

When the WMS ships an order, it sends shipping information to the PeopleSoft system using the Inventory Shipping EIP. This service operation contains all the information necessary to pick, pack, and ship individual orders in the system tables. In addition to providing basic information, the transaction creates single-level shipping containers and ship serial IDs.

The Inventory Pick Confirm EIP may be used in place of the Inventory Shipping EIP if the actual shipping action will occur in the PeopleSoft system. This EIP provides all information necessary to pick and relieve bin location inventory balances but does not ship orders. Information necessary to create single level shipping containers and ship serial IDs may also be provided on this EIP.

A third alternative for providing shipping information is the Shipping Notification EIP. In prior releases, the Shipping Notification EIP was used to send back picking and shipping details from the WMS system. The Shipping Notification EIP is available for backwards compatibility to earlier releases. However, if you are currently implementing the integration point between PeopleSoft Inventory and a WMS, use the Inventory Pick Confirm or the Inventory Shipping EIP instead of the Shipping Notification EIP.

No matter which of the above three EIPs are used, shipping information overriding carriers, shipping methods and freight terms can be entered on the transactional data if changes were made at shipping time. In addition, a unique Ship ID can be assigned to each shipment coming from the WMS system. However, if the Ship ID is left blank, the system will automatically assign a shipping ID as the order is shipped.

Note. A single release order line cannot be split across two different shipping IDs.

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Shipping Notification EIP

The system converts the Shipping Notification EIP to either an Inventory Pick Confirm or Inventory Shipping transaction as thedata is processed by the subscription process assigned to the Shipping Notification EIP. The original Shipping Notification data is written to the transaction log (BCT_CTL and BCT_DTL) in a complete status for audit purposes only. The system also writes the Inventory Pick Confirm or Inventory Shipping transaction data to the transaction log.

The shipping notification EIP includes the shipment header and shipment lines. A shipment designated by a shipment header is defined as a shipment event for a single carrier ID, ship type ID, freight terms value, ship date, ship time, and bill of lading. These field values must be identical for all lines defined for the given instance of a shipment header.

Shipping History and Documentation

PeopleSoft collects and tracks shipping history based on the information from the Inventory Pick Confirm EIP or the Inventory Shipping EIP. If a bill of lading number is sent to PeopleSoft Inventory in the data, the PeopleSoft system updates the demand fulfillment table, IN_DEMAND, for tracking purposes only. A bill of lading is not created in the PeopleSoft system.

In a WMS integration, the required shipping documentation is usually generated using the WMS; however, you can also generate this documentation using PeopleSoft components.

See Also

Chapter 2, “Understanding PeopleSoft Supply Chain Management Enterprise Integration Points,” page 9

PeopleSoft Enterprise Inventory 9.0 PeopleBook, “Picking Inventory,” Entering Picking Feedback Using an Electronic Data Collection System

PeopleSoft Enterprise Inventory 9.0 PeopleBook, “Shipping Inventory”

PeopleSoft Enterprise Inventory 9.0 PeopleBook, “Understanding Order Fulfillment Processing”

The Procure-to-Pay Business Process in a WMS Integration

This section discusses:

- Requisitions.
- Purchase orders.
- Purchase order expected receipts processing.
- Receiving.

The procure-to-pay business process enables companies to buy goods and services from their suppliers. Here is an overview of the process in a WMS integration:

1. PeopleSoft components are used to manage stock replenishment, create requisitions and purchase orders, and automatically source and dispatch the purchase orders.
2. When the requested stock on purchase orders arrives, the WMS handles the receiving, inspection, and putaway transactions for the stock.
3. The PeopleSoft system provides costing and accounts receivable functions.

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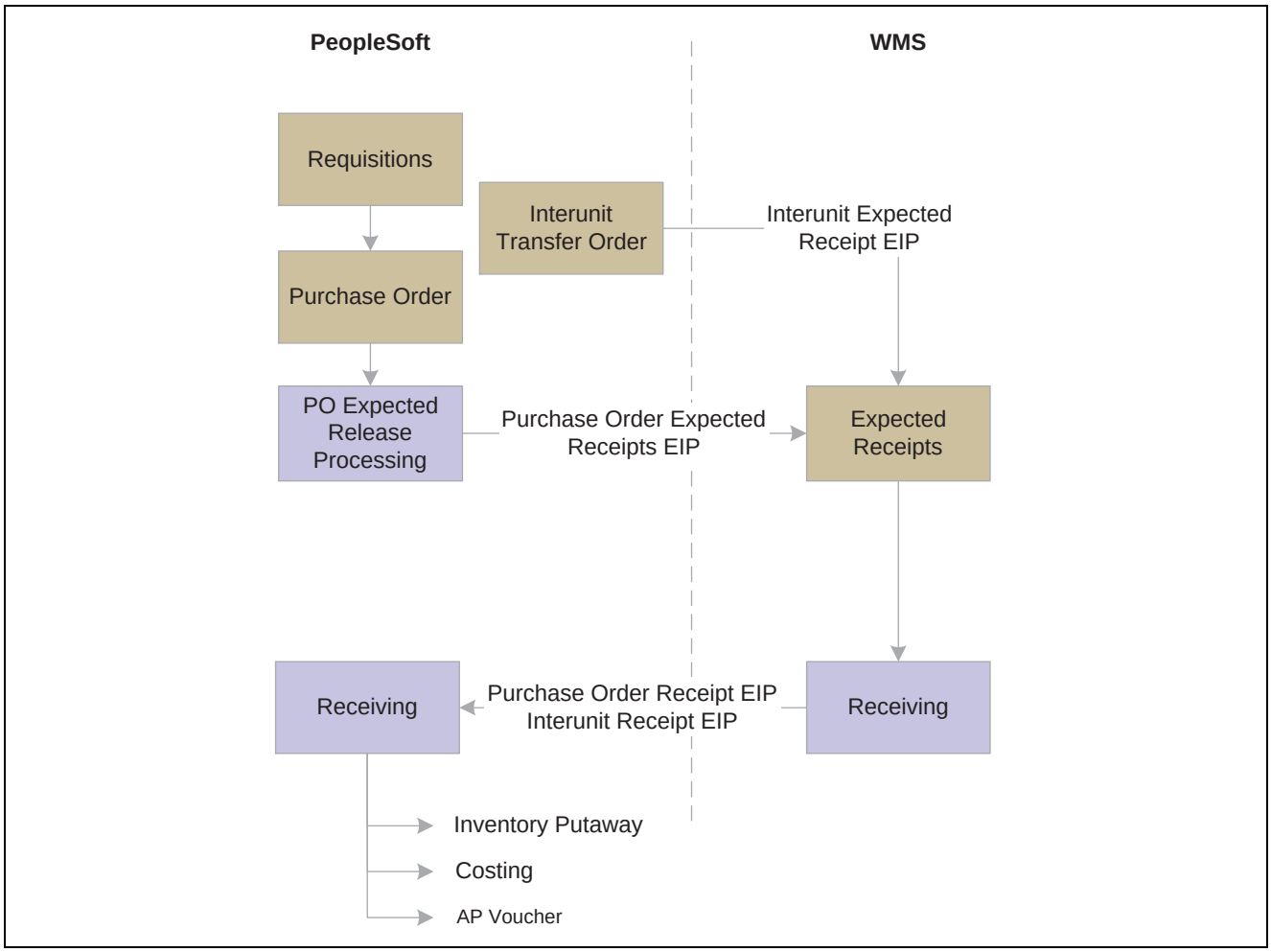
Procure-to-Pay Process Flow in a WMS Integration

The following diagram shows how the procure-to-pay functions are performed in a WMS integration:



Procure-to-pay processing

The EIPs that support the procure-to-pay business process in a WMS integration are based on a number of assumptions. The following sections detail these assumptions for each phase of the procure-to-pay business process.

Requisitions

Requisitions can be created in PeopleSoft Purchasing using a variety of methods. After a requisition is created, it moves through PeopleSoft Purchasing to become either a purchase order that is sent to a vendor or a demand that is staged in a PeopleSoft Inventory business unit. In a WMS integration, requisitions are created and maintained in the PeopleSoft system. Requisitions are not sent to the WMS.

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Understanding Requisitions"

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Purchase Orders

As with requisitions, purchase orders can be created in PeopleSoft Purchasing using a variety of methods. After they are approved and sourced, purchase orders are dispatched to vendors.

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Understanding Purchase Orders"

Purchase Order Expected Receipts Processing

For purchase orders that will be received by a business unit under external warehouse control, the PeopleSoft system publishes outbound information using the Purchase Order Expected Receipts EIP. When receiving the stock from a purchase order, the WMS matches the actual receipt against the data in the PO expected receipts transaction.

The transactional data in the PO Expected Receipt EIP is sent to the WMS for dispatched purchase orders that are expected to be received within a user-defined period. If a change is made to a purchase order that has been included in a previous PO expected receipts transaction, another expected receiptstransaction is published when the change event occurs. This includes closing or canceling the purchase order. When the WMS receives a POexpected receipts transaction for a purchase order with a *Closed* or *Canceled* status, the corresponding PO expected receipt transaction in the WMS can also be closed or canceled.

The PO expected receipts transaction includes purchase order header, order line, schedule line, and comment information. The PO expected receipt line segment includes an order quantity field that represents the total of the associated schedule lines. The schedule line segment contains a combination of specific purchase order line, schedule, and distribution information. Purchase order comments and notes segments are provided at the header, line, and schedule levels.

Note. The order quantity on the receipt line is provided for WMSs that cannot handle the three-level purchase order structure (header, line, and schedule). In this case, the WMS uses the purchase order line-level receipt variation (Transaction Code 0103) of the purchase order receipt transaction.

In the PeopleSoft system, there are two service operations that make up the Purchase Order Expected Receipt EIP:

- The first service operation (PO_EXPECTED_RECEIPT_BUS_UNIT) contains PO expected receipt information for a specific PeopleSoft Inventory business unit.

  For example, you may have a single purchase order line with an order quantity of 75 units that are distributed among three different PeopleSoft Inventory business units for a quantity of 25 units each. Three different purchase order expected receipt transactions containing an order line quantity of 25 are generated, one for each inventory business unit. This is the transaction that is used in most WMS implementations, because most WMSs expect purchase order information for the specific business unit under their control.

- The second service operation (PO_EXPECTED_RECEIPT_SHIPTO) contains PO expected receipt information for a specific ship to location.

  In this case, the PO expected receipts are grouped by ship to location instead of business unit. Using this second type of purchase order expected receipt transaction in the preceding example, the system generates a single transaction for a total quantity of 75 units.

The Publish Outbound Message process publishes the purchase order expected receipt data for all PeopleSoft Inventory business units or ship to locations on purchase orders that meet specified selection criteria.

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Only the Process Outbound Message process publishes purchase order expected receipt data. An expected receipt transaction cannot be generated from the Return to Vendor - RTV page. This constraint has the following implications for a WMS integration:

- When you reopen a purchase order in PeopleSoft, no transaction is sent to the WMS to reopen the purchase order; however, if you make a change to the reopened purchase order, the system sends a PO expected receipt message to the WMS, where the purchase order has a *Closed* status.

  To resolve this discrepancy, you can set up the WMS to reopen a purchase order automatically if a PO expected receipt transaction is received for a closed purchase order. Alternatively, for business units under WMS control, the option to reopen purchase orders for vendor returns, RTV Reopen PO, can be disabled in the PeopleSoft system on the Purchasing Definition - Business Unit Options page.

- When you perform a vendor return in PeopleSoft Purchasing, you can return a quantity for replacement.

  When you select the return-for-replacement option, the quantity that was received is reduced by the quantity you are returning for replacement. This logic makes the open quantity on the purchase order equal to the returned quantity. However, because no PO expected receipt data is sent to the WMS from the Return to Vendor - RTV page, the new open quantity is not reflected in the WMS. To resolve this discrepancy, you can either:

  - Enable the WMS to over-receive, this will allow receipts greater than the original order quantity.

    This solution requires that the WMS be able to receive against a closed purchase order. If the purchase order was originally closed in the PeopleSoft system and then reopened from the RTV page, the status of the purchase order remains closed in the WMS.

  - Disable the RTV Adjust Source option on the Purchasing Definition - Business Unit Options page.

    When you disable this option, the receipt quantity (Net Receive Qty) is not decreased when you return for replacement from the Return to Vendor - RTV page. With this solution, after entering the return-to-vendor information, you add a new schedule for the replacement quantity on the Purchase Order - Form page. The change on the Purchase Order Form page generates PO expected receipt information, which provides the WMS with an open quantity against which to receive.

Interunit Transfer Expected Receipts Processing

Interunit transfer orders are created in the PeopleSoft system to move stock between business units. The Interunit Expected Receipt EIP is an asynchronous outbound service operation (INTERUNIT_EXPECTED_RECEIPT). The transactional data is generated by the Process Outbound Message process using this EIP when an interunit transfer order has a destination business unit that is under external warehouse control and the transfer order is depleted. The WMS uses the information from the interunit expected receipt EIP to validate the receipt of goods when the shipment arrives at the destination warehouse.

The interunit expected receipt EIP includes receipt header information and receipt lines with details of each item that was shipped.

In PeopleSoft Inventory, you can cancel in-transit interunit transfer orders using the Cancel Interunit Transfers page. For transfer orders that have been sent out on previous interunit expected receipt transaction, the cancellation transaction generates an interunit expected receipt transaction with a status of *Cancel.*

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, “Creating Requisitions Online,” Creating Requisition Lines

PeopleSoft Enterprise Inventory 9.0 PeopleBook, “Transferring Stock Between Business Units”

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Receiving

In a WMS integration, all receiving, inspection, and putaway activities are performed using the WMS. To confirm that stock has been received for a purchase order or an interunit transfer, the WMS sends a receipt confirmation transaction to the PeopleSoft system using the Purchase Order Receipt EIP or the Interunit Receipt EIP.

For both purchase order and interunit receipts, the receipt confirmation transaction includes header information and receipt lines with details about what was physically received at the business unit under WMS control.

The WMS can include the receipt ID and receipt line number in either of the receipt confirmation transactions. To ensure that receipt IDs assigned by the WMS are unique, define a range of ID numbers during implementation for exclusive use by the WMS. If the receipt ID is not included on the confirmation , the PeopleSoft system generates one automatically.

If either of the receipt confirmation transactions includes the material storage location data, the item is put away to the specified material storage location. Otherwise, the item is put away using the putaway rules defined for the business unit.

Blind receipts from a WMS are not accepted. All receipt confirmation data that the WMS sends must have a valid purchase order number or interunit ID number.

In PeopleSoft Purchasing, the Receiver Load process (PO_RECVLOAD) processes the purchase order receipt confirmation transactions. The Receiver Load process can accept purchase order receipts at either the purchase order line or schedule level. During a WMS implementation, consider these processing rules when deciding how best to use this functionality:

- When working at the schedule level, the Receiver Load process receives the full quantity against a given schedule line number.

  When working at the line level, the Receiver Load process applies the full quantity received to the first open schedule for that line unless the Allow Receipt Load Cascade option is enabled to cascade receipts across multiple schedules. If the cascading feature is enabled, any full quantity is applied to the first schedule, and any excess quantity is applied to the next schedule, and so on until the full quantity is consumed. You set the Allow Receipt Load Cascade option on the Purchasing Definition - Business Unit Options page.

- The inventory business unit is included in the receipt transaction to associate the receipts to the appropriate distribution line.

  If the inventory business unit is included on the transaction, the receipt affects only the quantity for the business unit's distribution line. If the inventory business unit is blank, the quantity received is received against each distribution line until the entire quantity for the schedule is received.

The Interunit Receiving process (INPJIURV) processes the interunit transfer receipt confirmation transactions. When an interunit receipt is completely received and closed, an interunit expected receipt transaction is generated with a status of *Received.* The *Received* status on the transaction indicates that the transfer order can be closed in the WMS system.

See Also

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

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Receiving Shipments"

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Four-Wall Warehousing Functions in a WMS Integration

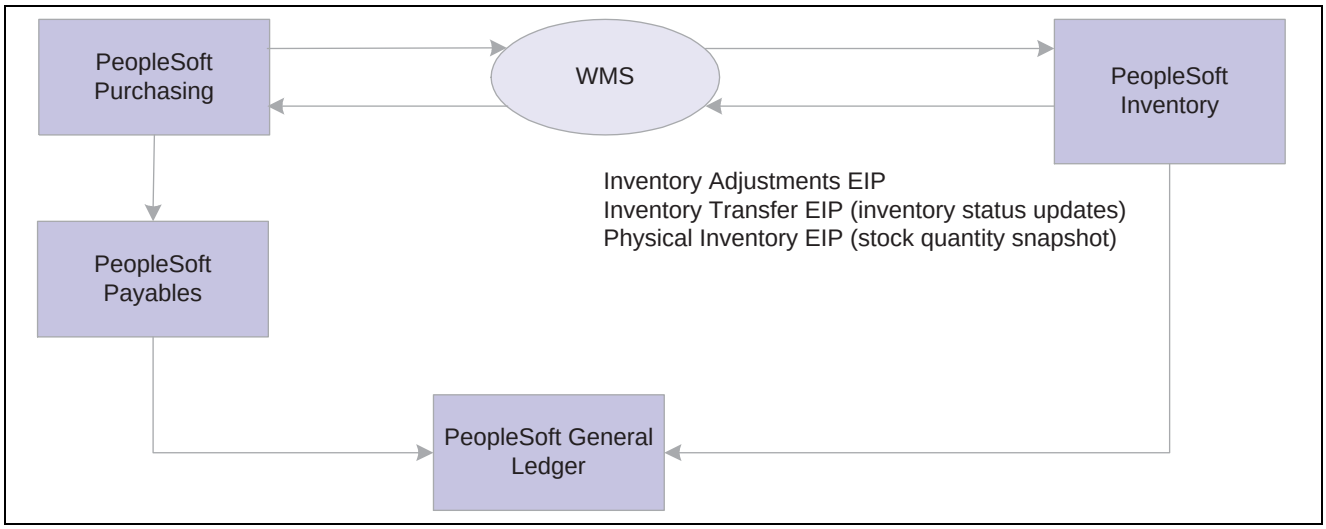
This section discusses:

- Inventory adjustments.
- Storage location transfers (inventory status updates).
- Physical inventory (stock quantity snapshots).

Four-wall functions are material management activities bounded by the four walls of a specific warehouse, including performing cycle counts and full physical inventory counts, adjusting quantities for specific material storage locations, replenishing fixed picking locations, and making any other stock transfers between material storage locations. In a WMS integration, all four-wall functions are performed in the WMS and then reported to the PeopleSoft system by using EIPs.

Process Flow for Four-Wall Warehousing Functions in a WMS Integration

The following diagram shows the process flow for four-wall EIPs in a WMS integration:



Four-wall warehousing functions

The EIPs that support the four-wall functions in a WMS integration are based on a number of assumptions. The following sections detail the assumptions for each function.

Inventory Adjustments

Inventory quantity adjustment transactions are generated from the WMS using the Inventory Adjustment EIP. The inventory adjustment transaction notifies PeopleSoft Inventory of quantity changes required for defective, found, or lost stock. This transaction is a simple quantity adjustment for an item in a particular material storage location.

Distribution types on the adjustment transaction are used for inventory accounting. Some WMSs have charge codes that match up to the distribution type fields. However, if the WMS charge codes differ from the distribution types established in PeopleSoft Inventory on the Distribution Type page, the WMS charge codes must be converted to match the PeopleSoft distribution types when the transactional data is mapped. If the distribution type field is left blank, the PeopleSoft system uses the default distribution type established for the selected adjustment type on the Default Distribution Type page.

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Note. ChartField overrides are not permitted for adjustment transactions.

Storage Location Transfers (Inventory Status Updates)

To notify PeopleSoft Inventory of material transfers between material storage locations, the WMS generates inventory transfer data using the Inventory Transfer EIP. In a typical WMS integration in which quantity balances are tracked only at the business unit level in the PeopleSoft system, the inventory transfer data sent to the PeopleSoft system change the status of the stock to *Open* or *Hold*. In PeopleSoft Inventory, two storage locations are defined in the PHYSICAL_INV table: one for quantity with an *Open* status and another for quantity with a *Hold* status. Inventory status change transactions originating from the WMS must be translated to map to the EIP by identifying the *Open* and *Hold* locations that are used in the PeopleSoft system.

Physical Inventory (Stock Quantity Snapshots)

To synchronize quantity balances between the two systems, the WMS uses the Physical Inventory EIP to send PeopleSoft Inventory a stock quantity snapshot transaction that reflects the current stock quantity balances for the business unit. In PeopleSoft Inventory, this data is processed as a physical inventory transaction. You can use the quantity balances in this inbound data to run a reconciliation report and stock quantity update process, just as you would for a cycle or physical count performed for an PeopleSoft Inventory business unit that is not integrated with a WMS.

Because the success of the WMS integration relies on synchronous quantity balances between the two systems, a quantity balance synchronization procedure should be performed as often as feasible.

Synchronizing Quantity Balances

Here are steps for synchronizing quantity balances between PeopleSoft Inventory and a WMS:

1. In the WMS, perform a counting event and use the Physical Inventory EIP to send PeopleSoft Inventory a transaction that reflects the current quantity count.

   A counting event can be for all items in the WMS or for a specific item, lot, or material storage location. Each stock quantity snapshot includes header information for the counting event and lines detailing the count quantity and material storage location information for each item counted. When the data is received, PeopleSoft Inventory loads the counting event data into the electronic data collection transaction tables.

   Note. The data sent using the Physical Inventory EIP is used to perform periodic checks of the quantity balance synchronization between the two systems. There is no expectation that an actual cycle count or physical inventory count has occurred in the WMS. The Physical Inventory EIP is not used to communicate quantity balance changes from a physical inventory or cycle counts in the WMS. In these cases, the WMS sends PeopleSoft Inventory an adjustment using the Inventory Adjustments EIP.

2. Run the Physical Inventory process (INPIPHYS) to move the counting event data to the count table (COUNT_INV) in PeopleSoft Inventory.

   Set up run control parameters for the Physical Inventory Load process on the Physical Inventory Process page under the SCM Integrations menu.

3. Run the Physical Accounting Reconciliation report to detect any discrepancies between the two systems.

   Set up run control parameters for the Physical Accounting Reconciliation report on the Reconciliation Report page. If you find a discrepancy and do not want to accept the adjustment, you can use the Item Counts page to change the status of the counting event line to exclude it from the Stock Quantity Update process (INPOPOST).

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4. Run the Stock Quantity Update process to update the quantities in PeopleSoft Inventory.

   Set up run control parameters for the Stock Quantity Update process on the Stock Quantity Update Process page.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Counting Inventory Stock"

Static Information Updates in a WMS Integration

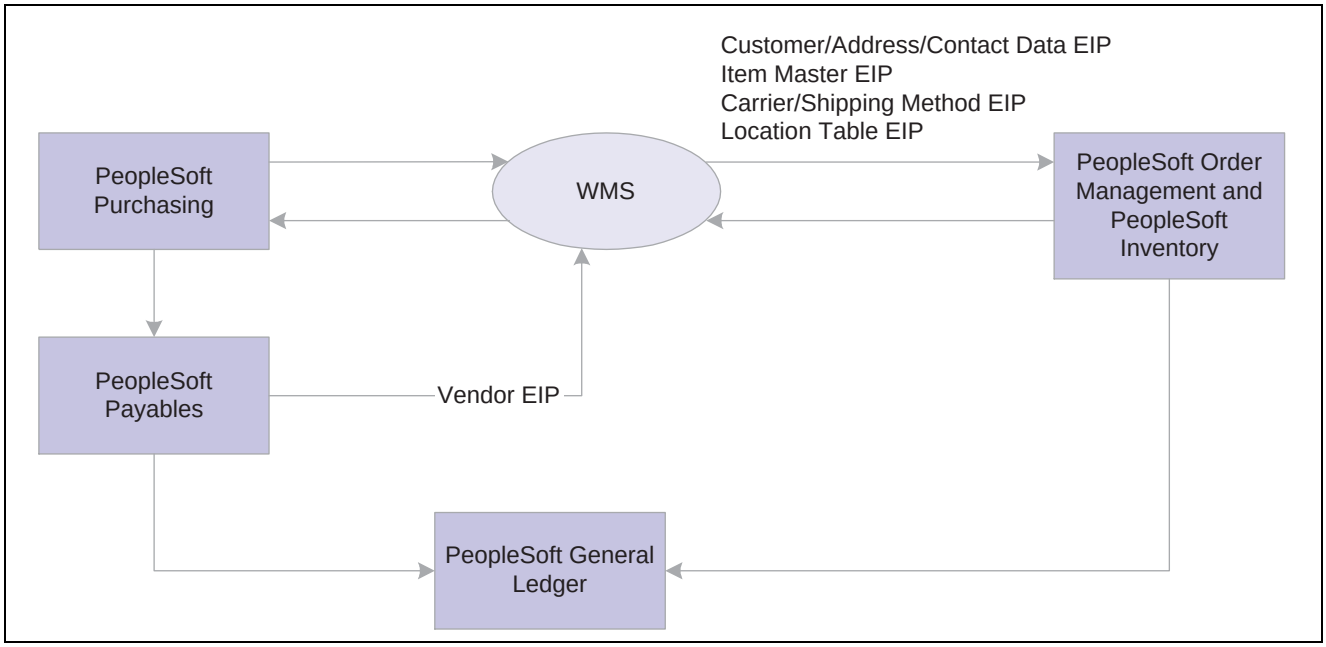
This section discusses:

- Customer data.
- Vendor data.
- Item data.
- Carrier and shipping method data.
- Location data.

Static information includes data about customers, vendors, items, carriers, and locations. In a WMS integration, all static information is maintained in the PeopleSoft system and update information is sent to the WMS as necessary. If a change is made to any part of the static information in the PeopleSoft system, even to a field that does not exist on the outbound message, information indicating a change event is sent to the WMS.

Process Flow Static Information Transfers in a WMS Integration

The following diagram shows the process flow for static information transfers in a WMS integration:



Static information transfers in a WMS integration

The EIPs that support the static information updates in a WMS integration are based on a number of assumptions. The following sections detail these assumptions for each static data type.

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Customer Data

Using the Customer/Address EIPs, the PeopleSoft system publishes updates for customer-related information to the WMS when a customer record is created, changed, or inactivated. These EIPs includes customer master and address information and may be filtered based on the PeopleSoft setID.

See Also

PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook, "Maintaining General Customer Information"

Vendor Data

Using the Vendor EIP, the PeopleSoft system publishes updates for vendor-related information to the WMS when a vendor record is created, changed, or inactivated. The information may be filtered by the PeopleSoft setID.

See Also

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

Item Data

Using the Item Master EIP, the PeopleSoft system publishes updates for item-related information to the WMS when an item record is created and set to an approved status, or when changes are made to the item after it has reached an approved status. The data includes item master, item detail, unit of measure, purchasing attributes, business unit attributes, and business unit weight and volume information for approved items only. The item data may be filtered by both the PeopleSoft setID and business unit.

See Also

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Defining Items by SetID"

Carrier and Shipping Method Data

Using the Carrier/Shipping Method EIP, the PeopleSoft system publishes updates for carrier-related information to the WMS when a carrier record is created or changed. The transaction includes carrier master information and is filtered by the PeopleSoft setID.

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Setting Up Freight Carriers

Location Data

Using the Location Table EIP, the PeopleSoft system publishes updates for location-related information to the WMS when a location record is created or changed. The data includes location master information and is filtered by the PeopleSoft setID. The locations are established on the Location - Location Definition page in the PeopleSoft system to identify the address of an internal location that can receive interunit transfer orders. The WMS uses the location on interunit transfer orders as it would the customer ID on customer sales orders.

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PART 4

Integrating to Healthcare Applications

Chapter 7
Integrating With a Third-Party Point-of-Use Supplier System

Chapter 8
Integrating With a Third-Party Surgical Resource Software Application

CHAPTER 7

Integrating With a Third-Party Point-of-Use Supplier System

This chapter provides an overview of point-of-use (POU) supplier systems and discusses how to:

- Define par location data for the POU supplier and the PeopleSoft system.
- Manage item replenishment data in the POU supplier and the PeopleSoft system.
- Restock a POU supplier.
- Use POU supplier enterprise integration points (EIPs).

Understanding POU Supplier Systems

This section discusses:

- General assumptions about POU supplier systems.
- Definition of items and par locations.
- Chunking Rules for streamlining POU supplier integration processes.
- POU suppliers as par locations in PeopleSoft Inventory.
- Returns to vendors (RTVs) for POU supplier items.

You can integrate PeopleSoft Inventory par location functionality with POU supplier systems. This integration consists of generic EIPs, using service operations in PeopleSoft Integration Broker to exchange applicable par location, item counts, and expected receipt information between the PeopleSoft system and the POU supplier.

This chapter describes the implementation of a full integration between POU medical supply dispensing cabinets and PeopleSoft. The use of POU supplier systems for issuing medical supplies is prevalent in today's typical hospital environment. POU supplier systems maintain available stores of medical supplies for the immediate and ad hoc needs of a hospital's surgical, nursing, and distribution staff during normal operations. A POU supplier system maintains on-hand quantities at all times and records patient usage as it occurs.

A POU supplier system can be a complete standalone system, but it is usually integrated with a hospital's materials management information system (MMIS), such as PeopleSoft Inventory and PeopleSoft Purchasing. Integrating a POU supplier system with an MMIS can help a healthcare organization achieve maximum benefit from its investments on both fronts.

In this integration scenario, the PeopleSoft system is responsible for:

- Defining and maintaining the par location and item information.
- Issuing stock from inventory to the par locations.
- Performing the receipt of purchased goods.

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- Replenishing the materials to the par locations.

The POU supplier systems are responsible for:

- Keeping track of the stock on hand in the POU locations.
- Capturing the use of the medical supplies issued.

  That use can in turn be charged directly to a specific patient's account. If the charges are made directly to patient accounts, the POU supplier system is also usually integrated with the hospital's patient accounting or clinical systems.

Assumptions About POU Supplier System Integration

The POU supplier system integration works as designed only if you understand the following assumptions and your system complies with them:

- Because patient usage is recorded in the POU supplier system and not in PeopleSoft Inventory, the material usage and reconciliation feature in PeopleSoft Inventory should not be used.

  Any reconciliation procedures must be handled by the POU supplier system.
- If you use POU supplier systems in some locations and PeopleSoft Inventory par locations in others, and if you plan to use the consumer usage feature, you need to set up two feeds to the admission, discharge, and transfers and patient billing systems: one from PeopleSoft and one from the POU supplier system.
- If a POU supplier is reconfigured, for example, if bins are removed, added, or moved, the physical reconfiguration of the POU supplier needs to occur first, followed by the manual online maintenance of the par location in PeopleSoft Inventory.

  The Par Location EIP transactions are then published to update the supplier accordingly.
- All par locations, whether integrated with a POU supplier system or not, are replenished using the PeopleSoft Inventory Create Par Replenishment Requests process (INPGCDMD).

Definition of Items and Par Locations for a POU Supplier Integration

All item and par location data is set up and maintained in the PeopleSoft system. However, a successful integration with a POU supplier depends on understanding how the POU supplier system uses the fields that you define in the PeopleSoft system. Here are two important points to keep in mind:

- The charge code and the usage tracking method (charge type) are required fields for every item in the par location for use with POU supplier systems.

  Because the POU suppliers pass patient usage information directly to a patient billing system, these two pieces of information are vital. Both fields are part of the par location definition created in the Par Location Definition component, and they are included in the par location data that PeopleSoft Inventory sends to the POU supplier system.
- The same item can exist in a par location in both the PeopleSoft system and POU supplier system.

  The compartment in the PeopleSoft system and the bin in the POU supplier both identify the unique location of an item in the POU par location. The POU supplier's bin is a system-generated, assigned field and the PeopleSoft system's compartment field cannot be fed into it. The POU supplier system needs to process the PeopleSoft compartment information separately to avoid data update conflicts.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Tracking Material Usage"

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Chunking Rules for Streamlining POU Supplier Integration Processes

You can use the PeopleSoft chunking methodology to reduce the volume of data that are sent in the outbound publishing process. Chunking enables you to segment a transaction by business unit and location or par location and define which nodes receive the specific information. This functionality is especially helpful if not all of your subscribing nodes need to receive the data published by all departments. For example, you can set up processes so that business units and locations that exist as subscribers in third-party systems receive only the data that are specifically published for them according to the chunking rules and node maps that you implement.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

POU Suppliers as Par Locations in PeopleSoft Inventory

Rather than setting up POU suppliers as PeopleSoft Inventory business units, you can set up your system to track POU suppliers as par locations within PeopleSoft Inventory. In this case, par location replenishment transactions for affected items must be subject to the same replenishment rules in PeopleSoft Inventory or PeopleSoft Purchasing.

However, the PeopleSoft system is not responsible for consumer charges because POU supplier systems pass this information to the consumer accounting system. The direct purchase and direct inventory issue processes to the POU suppliers should remain as originally designed in the PeopleSoft system.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Managing Par Inventory"

RTVs for POU Supplier Items

A PeopleSoft Purchasing RTV should be created if an incorrect item is delivered for replenishing a POU supplier. This kind of mistake is typically discovered at the main loading dock of the healthcare facility. However, if the item has already been received into PeopleSoft Purchasing, a transaction will have already been published to the POU supplier system. In this case, the POU supplier never receives the shipment and the system never fills the PO Receipt Notification transaction that is issued for the item.

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Managing Vendor Returns"

http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

Defining Par Location Data for the POU Supplier and the PeopleSoft System

This section discusses the procedures and application functions that are used to maintain par location data in PeopleSoft Inventory and the POU supplier system. Here are steps for defining and maintaining the par location data:

1. Decide on and document the specifications for the POU supplier configuration.

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You build the POU supplier system based on the specifications (for example, compartment sizing, capacity, and so forth). Thoroughly document the system requirements.

2. Create par locations in the PeopleSoft system that correspond to the POU supplier.

   Once you determine the configuration of the supplier and build the POU supplier system, create the corresponding par location in the PeopleSoft system by using the Par Location Definition component. You set up and maintain all item and par location data in the PeopleSoft system.

3. Run the Full Data Publish process to initially populate the POU supplier with item data.

   Use the Full Data Publish process (available under the Manage Integration Rules menu) to publish a full-data replication of the par locations for the initial implementation by using the PAR_LOCATION_FULL_SYNC service operation (EIP). Run this process after the par locations are defined. This service operation is used to initially populate the POU supplier with par location item data.

4. Save changes to the Par Location Definition component to update the POU supplier.

   All subsequent changes saved to the Par Location Definition component for existing par locations are sent to the POU supplier in partial-data replication (PAR_LOCATION_SYNC service operation) using the Par Location EIP. These partial-data replications are published when saving the Par Location Definition component to keep the POU supplier current with ongoing PeopleSoft Inventory par location definitions and item changes.

See Also

Chapter 2, "Understanding PeopleSoft Supply Chain Management Enterprise Integration Points," page 9

Managing Item Replenishment Data in the POU Supplier and the PeopleSoft System

This section discusses the procedures and application functions used to manage item replenishment data in POU suppliers and PeopleSoft. Here is the process for managing item replenishment data:

1. The POU supplier system tracks on-hand quantity and material usage.

   The POU supplier system maintains on-hand quantities for each of its par location items set up in the PeopleSoft Inventory Par Location Definition component, and it records consumer material usage throughout the day.

2. The POU supplier system publishes on-hand par location count data to PeopleSoft Inventory.

   The POU supplier uses the Par Location Count EIP to publish on-hand par location count data to PeopleSoft Inventory. This publication occurs at user-requested intervals from the POU supplier to provide the PeopleSoft system with current on-hand quantities for each item in the POU par locations.

3. PeopleSoft Inventory subscribes to the on-hand par location count data from the POU supplier system.

   PeopleSoft Inventory uses the Par Location Count EIP to subscribe to this data. Once the data is received, the PeopleSoft system updates the par location count tables and the par location count information is ready to be processed using the Create Par Replenishment Requests process (INPGCDMD).

   Note. Any existing POU supplier-based replenishment processes are not used in this integration.

4. Run the Create Par Replenishment Requests process (INPGCDMD) in PeopleSoft Inventory.

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The Create Par Replenishment Requests process takes each par location count and replenishes items that fall below the par level that you identify on the Par Location Definition - Line page. A purchase order, requisition, or material stock request is created in the PeopleSoft system to replenish the stock to par levels.

5. Deplete the material stock requests created to replenish a POU supplier.

   For material stock requests that have issued stock from inventory to the par location and have been depleted, the Internal Location Expected Receipt EIP publishes data to the POU application using the IN_PUB_MSG Application Engine process.

6. Receive direct-purchase items with the Receiving component in PeopleSoft Purchasing.

   Receiving material against a purchase order in the Receiving component in PeopleSoft Purchasing triggers the publication of a data transaction to the POU supplier using the Purchase Order Receipt Notification EIP. This transaction identifies all direct-purchase items and quantities that have been received and are delivered to specified locations. The Receipt Push process (RECVPUSH) loads the stage table (RECV_PUSH_NTFY). If a chunking rule for the service operation and publish rule exists on the publish rule definition table (EO_MSGPUBDEFN), then the system creates staging records for only those par location receipt transactions that have the par location defined on the par location chunking table (IN_BU_PAR_EOC). If the chunking rule does not exist, then staging records are created for all par location receipt transactions. Once the stage table is loaded, it calls the program that in turn publishes the receipt notification data.

See Also

Chapter 2, “Understanding PeopleSoft Supply Chain Management Enterprise Integration Points,” page 9

http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

Chapter 8, “Integrating With a Third-Party Surgical Resource Software Application,” page 219

PeopleSoft Enterprise Inventory 9.0 PeopleBook, “Managing Par Inventory,” Replenishing Par Locations

Restocking a POU Supplier

This section discusses the typical procedure used to physically restock POU supplier systems. Here are the steps:

1. Generate the appropriate reports for the material to be restocked at the POU supplier.

   Typically, the technician assigned to restock the POU supplier is prompted through the POU supplier restock event by the light guides on the POU supplier unit. The lights are activated based on the information in the data sent using the Internal Location Expected Receipt EIP (outbound) or Purchase Order Receipt Notification EIP (outbound).

   For item issues out of inventory, the Shipping Document Report page (INC6503) can be requested to accompany the delivery of the stock items to the POU par location. For purchased items, the Receiver Delivery report (POY5030) can be generated to accompany the stockless and non-stock items to the POU par location.

   The restock technician can then use these reports along with the light guides on the POU to ensure that the par locations are updated with the correct quantities.

2. Compare expected receipts with actual receipts, and record discrepancies.

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When restocking a light-guided POU supplier, the technician follows the lights on the POU supplier and, for each item, verifies that the quantity displayed, or the expected receipt quantity, is the same as the actual quantity received. If the quantity received is different from the expected quantity, the technician records the variation on the report.

3. Manually restock the POU bin or compartment with the received stock.

   The technician refills the bins or compartments in the POU supplier with the received stock.

4. Complete the restocking event in the POU supplier system.

   The final step of the restocking event takes place in the third-party POU supplier system. Typically, the technician updates the POU supplier system with the actual quantities that are used to restock the POU supplier bins or compartments.

Using POU Supplier EIPs

Four EIPs (service operations in PeopleSoft Integration Broker) are used to exchange data between the PeopleSoft Inventory and the POU supplier systems. They are:

- Par Location EIP (outbound).
- Par Location Count EIP (inbound).
- Internal Location Expected Receipt EIP (outbound).
- Purchase Order Receipt Notification EIP (outbound).

Following the Data Flow Between the PeopleSoft System and the POU Supplier System

The following diagram illustrates the data flow in a POU supplier integration:

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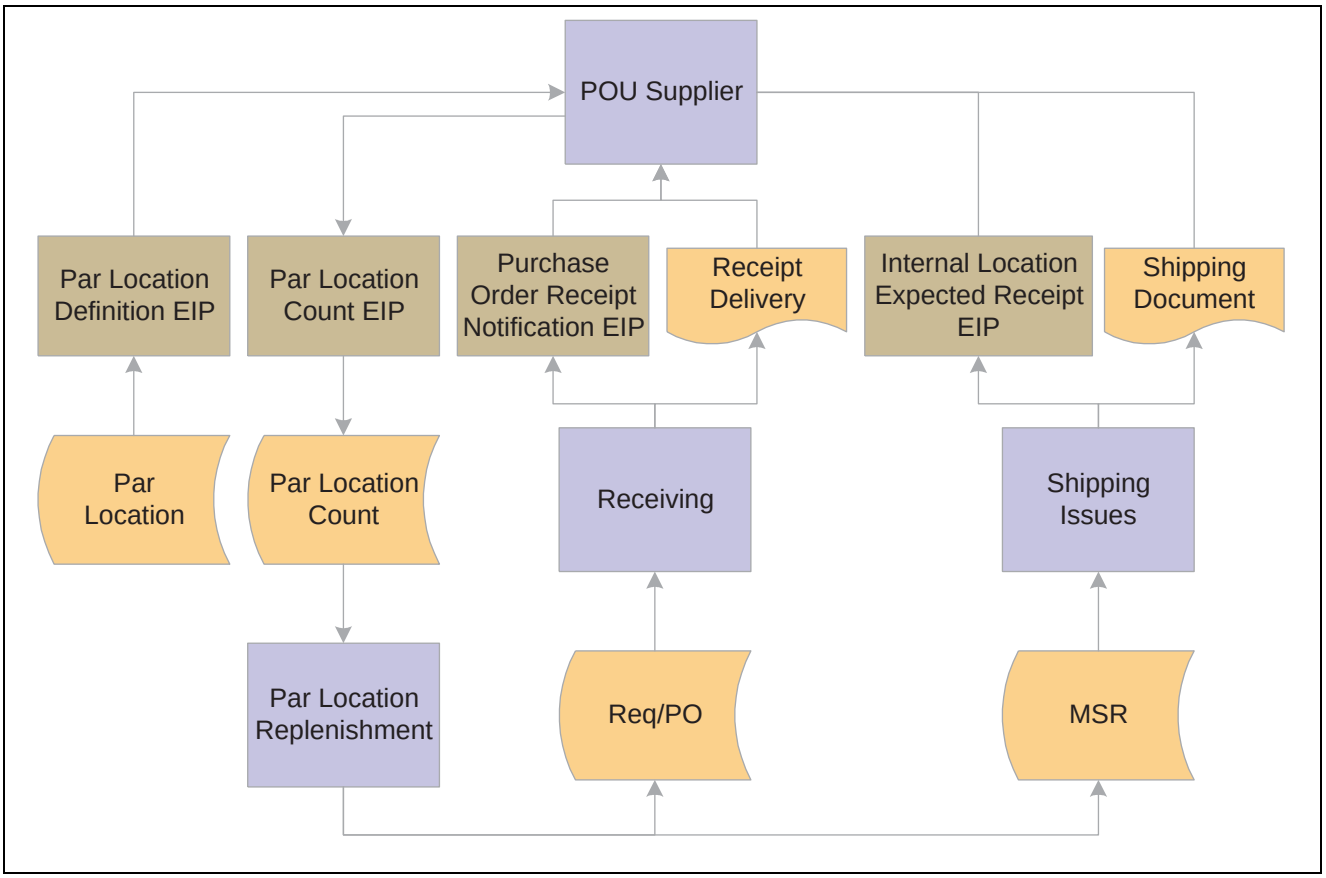

POU supplier integration with a PeopleSoft system

See Also

Chapter 7, “Integrating With a Third-Party Point-of-Use Supplier System,” Defining Par Location Data for the POU Supplier and the PeopleSoft System, page 213

Chapter 2, “Understanding PeopleSoft Supply Chain Management Enterprise Integration Points,” page 9

http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

Managing Subscription Errors for POU EIPs

Error management is integral to the effectiveness of inbound EIPs in the PeopleSoft system. In the process of uploading data transactions, the PeopleSoft subscription process detects any data errors and stores them in queues or staging tables for manual correction in the PeopleSoft system before updating any core PeopleSoft application tables.

Each of the inbound EIPs facilitating the subscription of transactions from third-party applications has its own transaction code that must be entered on an assigned data management page to access the EIP’s specific error-correction page.

The Par Location Count EIP, which is used in both surgical resource system and POU supplier system integrations, uses the transaction code*Par Loc,* which is entered on the Transaction Maintenance page. You use the Transaction Maintenance page to access error-correction pages for transactional data.

See Also

Chapter 2, “Understanding PeopleSoft Supply Chain Management Enterprise Integration Points,” page 9

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CHAPTER 8

Integrating With a Third-Party Surgical Resource Software Application

This chapter provides an overview of surgical resource software (SRS) applications and discusses how to:

- Define assumptions of an SRS application integration.
- Define items and par locations for an SRS application integration.
- Use chunking to streamline your SRS application integration processes.
- Create RTVs for surgical resource par location items.
- Implement an SRS application integration.
- Use SRS application EIPs.
- Manage errors for SRS EIPs.

Understanding SRS Applications

SRS applications:

- Manage a variety of medical resources.
- Ensure that proper medical supplies are available at surgical facilities when needed.
- Handle scheduling to ensure that physicians and supporting staff are available at the correct place and time to perform surgical procedures.

Defining Assumptions of an SRS Application Integration

The SRS application integration is based on the following assumptions:

- Because patient usage is recorded in the SRS application and not in PeopleSoft Inventory, the material usage and reconciliation feature in PeopleSoft Inventory should not be used.

  Any reconciliation procedures must be performed in the SRS application.

- You set up dual feeds if you use an SRS application in some surgical resource locations and PeopleSoft Inventory par locations in others, and you use the patient usage feature in PeopleSoft.

  Set up the two feeds from the admissions, discharges, and transfers and patient billing systems, one to the PeopleSoft system and one to the SRS application.

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- All par locations, whether integrated with an SRS application or not, are replenished using the PeopleSoft Inventory Create Par Replenishment Requests process (INPGCDMD).

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Managing Par Inventory," Replenishing Par Locations

Defining Items and Par Locations for an SRS Application Integration

All item and par location data is set up and maintained in the PeopleSoft system. However, a successful integration with an SRS application depends on understanding how the SRS application uses the fields that you define in the PeopleSoft system.

A charge code and usage tracking method (charge type) are required fields for every par location item that is used with an SRS application. Because the SRS application passes patient usage directly to a patient billing system, these two pieces of information are vital. Both of these fields are a part of the par location definition created in the Par Location Definition component, and they are included in the par location EIP transactions that PeopleSoft Inventory sends to the SRS application.

When you define a par location in PeopleSoft Inventory, the par location ID appears by default in the location field. For the SRS application integration, it is imperative that you do not overwrite this default value. When direct purchase requests are passed to PeopleSoft Purchasing through the Purchase Order Requisition EIP (PURCHASE_REQUISITION_LOAD service operation), the par location ID is used as the location.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Tracking Material Usage"

Using Chunking to Streamline SRS Application Integration Processes

You can use PeopleSoft chunking methodology to reduce the volume of outbound data sent by the EIP. Chunking enables you to segment the data by business unit and location or par location and to define which nodes receive the specific information. This functionality is useful if only some of the subscribing nodes need to receive the data published by all departments. For example, you can set up your processes so that business units and locations that exist as subscribers in third-party systems receive only the data that are specifically published for them according to the chunking rules and node maps that you implement.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

Chapter 3, "Implementing Integrations," Setting Up Chunking, page 88

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Creating RTVs for Surgical Resource Par Location Items

A PeopleSoft Purchasing return to vendor (RTV) should be created if an incorrect item is delivered for replenishing a surgical resource par location. This mistake is usually discovered at the main loading dock of the healthcare facility. However, if the item has already been received into PeopleSoft Purchasing, a transaction will have already been published by the EIP to the SRS application. In this case, the surgical resource par location never receives the shipment and the system never fills the transaction from the PO Receipt Notification EIP issued for that item.

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Managing Vendor Returns"

http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

Implementing an SRS Application Integration

This section discusses how to:

- Define par location data for the SRS application and the PeopleSoft system.
- Stock case carts from a surgical resource par location.
- Maintain item replenishment data in the SRS application and the PeopleSoft system.
- Restock a surgical resource par location.

Defining Par Location Data for the SRS Application and the PeopleSoft System

This section describes the procedures and application functions used to maintain par location data in PeopleSoft Inventory and the SRS application.

To maintain par location data in PeopleSoft and the SRS application:

1. Create surgical resource par locations in PeopleSoft Inventory.

   Define the operating room resource locations as par locations in PeopleSoft Inventory using the Par Location Definition component. All item and par location data is set up and maintained in the PeopleSoft system.

2. Run the Full Data Publish process to initially populate the SRS application with item data.

   Use the Full Data Publish process to publish a full-data replication of the par locations for the initial implementation using the PAR_LOCATION_FULL_SYNC service operation (EIP) in PeopleSoft Integration Broker. This process should be run once the par locations are defined. You use this service operation to initially populate the SRS application with par location item data.

3. Save changes to the Par Location Definition component to update the SRS application.

   All subsequent changes saved to the Par Location Definition component for existing par locations are sent to the SRS application in partial-data replication EIP (PAR_LOCATION_SYNC service operation) using the Par Location Definition EIP. These partial-data replications are published when saving the Par Location Definition component to keep the SRS application current with ongoing PeopleSoft Inventory par location definition and item changes.

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See Also

Chapter 2, "Understanding PeopleSoft Supply Chain Management Enterprise Integration Points," page 9

Stocking Case Carts From a Surgical Resource Par Location

This section describes the tasks performed to stock a case cart in an integration of a PeopleSoft system and a third-party SRS application.

To stock a case cart for a procedure:

1. Schedule the surgical procedure in the SRS application.

   Typically, the operating room (OR) nurse or assistant schedules a procedure in the SRS application and defines a case cart of the required supplies for the procedure by using the preference cards defined for a physician or surgeon.

2. Run the material requisition process in the SRS application to source supplies required for upcoming procedures in PeopleSoft.

   Several days before the procedure, a materials requisition process in the SRS application identifies all of the items needed for the procedure. For the required items with on-hand quantity below par, the SRS application publishes data containing the required quantities needed for the procedure.

   PeopleSoft Purchasing subscribes to this data using the Purchase Order Requisition EIP. This service operation provides the PeopleSoft system with the information to enable the direct purchase of miscellaneous items needed for a particular procedure. This information includes the item ID, requested quantity, unit of measure, location (that is, the SRS storage location and PeopleSoft par location), due date (the procedure date), and case ID. The case ID is for trace purposes, and it is stored in the Description field (DESCR254) in the Comments table (PO_RQLD_CMT_SEG) in the EIP.

   The data is inserted into the PeopleSoft Purchasing requisition staging tables (PO_REQLOAD_RQST and PO_REQLOAD_CMT). The Purchasing Requisition Loader process (PO_REQLOAD) picks up the staged requisitions and inserts those with no data errors into the PeopleSoft Purchasing requisition tables for sourcing.

   If the Purchasing Requisition Loader process discovers errors in the data (such as data type inconsistency), the entire transaction is rejected. If there are application errors, the data is inserted and you can use the error-correction page to correct the data.

   Requests for non-stock items that have been staged to the PeopleSoft system are designated as processed in the SRS application. If the material requisitioning process is run again before the procedure is performed, requisitions for items below par are not duplicated. However, if additional quantities of requested items are required or if new items are needed, a new requisition transaction is published and staged to PeopleSoft Purchasing.

   If the original requisition quantity is decreased or canceled in the SRS application, the OR nurse or assistant can produce a cancellation report using the SRS application. This report identifying the canceled stock quantities can be sent to the materials management director, who can manually update the PeopleSoft system with the required changes. This might include canceling a requisition or modifying the requested quantity. If the vendor has already shipped the order or if the order has been received, it might require a return-to-vendor transaction.

   To facilitate finding the purchase order associated with the procedure that was canceled, the case ID is passed on in the data exchanged in the Purchase Order Requisition EIP.

   Based on setID, vendor priority, and item attributes, PeopleSoft Purchasing sources the requested item using the PeopleSoft Purchasing distribution network, and it creates purchase orders for stockless items as well as material stock requests in PeopleSoft Inventory for stock items if the stock is available.

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3. Receive and deliver the requested stock quantities to the surgical resource location.

   Non-stock and stockless items are received using components in PeopleSoft Purchasing and delivered to the surgical resource location that generated the request for the item. Stock items are issued to the surgical resource par location from PeopleSoft Inventory.

4. At the surgical resource location, pick materials required for the case cart.

   The day before the procedure, the OR nurse or assistant generates a pick list using the SRS application. The pick list is used at the surgical resource par location to retrieve the materials required to stock the case cart for the procedure.

   Depending on internal rules and regulations, material that is not consumed from the case cart can be returned to the surgical resource par location, where it can be picked for another procedure.

See Also

Chapter 2, "Understanding PeopleSoft Supply Chain Management Enterprise Integration Points," page 9

http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Changing, Canceling, and Holding Orders"

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Creating Orders for Fulfillment," Creating Online Orders Using Express Issue in PeopleSoft Inventory

Maintaining Item Replenishment Data in the SRS Application and the PeopleSoft System

Here's how to manage item replenishment data in the SRS application and the PeopleSoft system:

1. Use the SRS application to track material usage and on-hand quantity adjustments for the surgical resource par location.

   After a procedure, the OR nurse or assistant records consumer material usage in the SRS application and adjusts par on-hand quantities for applicable surgical resource par locations.

2. Use the SRS application to publish on-hand par location count data to PeopleSoft Inventory using the Par Location Count EIP.

   This publish occurs at user-requested intervals from the SRS application to provide the PeopleSoft system with current on-hand quantities for each item in the surgical resource par locations.

3. Use PeopleSoft Inventory to subscribe to the on-hand par location count data from the SRS application.

   PeopleSoft Inventory subscribes to this data using the Par Location Count EIP. Once the data is received, the PeopleSoft system updates the par location count tables and the par location count information is ready to be processed using the Create Par Replenishment Requests process.

   Note. Any existing SRS application-based replenishment processes are not used in this integration.

4. Run the Create Par Replenishment Requests process in PeopleSoft Inventory.

   The Create Par Replenishment Requests process takes each par location count and replenishes those items that fall below the par level identified for the item on the Par Location Definition - Line page. A purchase order, requisition, or material stock request is created in the PeopleSoft system to replenish the stock to par levels.

5. Deplete the material stock requests created to replenish a surgical resource par location.

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For material stock requests that have issued stock from inventory to the par location and have been depleted, the Internal Location Expected Receipt EIP publishes a transaction to the SRS application by using the IN_PUB_MSG Application Engine process.

6. Receive direct-purchase items with the PeopleSoft Purchasing Receiving component.

   Receiving material against a purchase order in the PeopleSoft Purchasing Receiving component triggers the publication of a transaction to the SRS application using the Purchase Order Receipt Notification EIP. This service operation identifies all direct-purchase items and quantities that have been received and are delivered to specified locations. The Receipt Push process (RECVPUSH) loads the stage table (RECV_PUSH_NTFY). If a chunking rule for the service operation and publish rule exists in the publish rule definition table (EO_MSGPUBDEFN), then the system creates staging records for only those par location receipt transactions that have the par location defined in the Par Location Chunking table (IN_BU_PAR_EOC). If a chunking rule does not exist, then staging records are created for all par location receipt transactions. Once the stage table is loaded, it calls the program that in turn publishes the receipt notification data.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Managing Par Inventory," Replenishing Par Locations

Chapter 2, "Understanding PeopleSoft Supply Chain Management Enterprise Integration Points," page 9

http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

Restocking a Surgical Resource Par Location

This section describes the typical procedure used to physically restock a surgical resource par location.

To physically restock a surgical resource par location:

1. Generate the appropriate reports for the material being restocked at the surgical resource par location.

   For item issues out of inventory, the IN Shipping Document (inventory shipping document) report (INC6503) can be requested to accompany the delivery of the stock items to the surgical resource par location. For purchased items, a Receiver Delivery report (POY5030) can be generated to accompany the stockless and non-stock items to the par location. This report, along with the service operation acknowledgment of the items sent, ensures that the par locations are updated with the correct quantities.

2. Compare expected receipts against actual receipts and record discrepancies.

   When restocking a surgical resource location, verify that the quantity delivered to the location is the same as the quantity expected. If the actual quantity received is different from the expected quantity, record the variation on the report.

3. Manually restock the surgical resource par location's bin or compartment with the received stock.

   Refill the bins or compartments in the surgical resource location with the received stock.

4. Complete the restocking event in the SRS application.

   The final step of the restocking event takes place in the third-party SRS application. Typically, the person restocking the surgical resource par location updates the SRS application with the actual received quantities that are used to restock the bins or compartments in the surgical resource par location.

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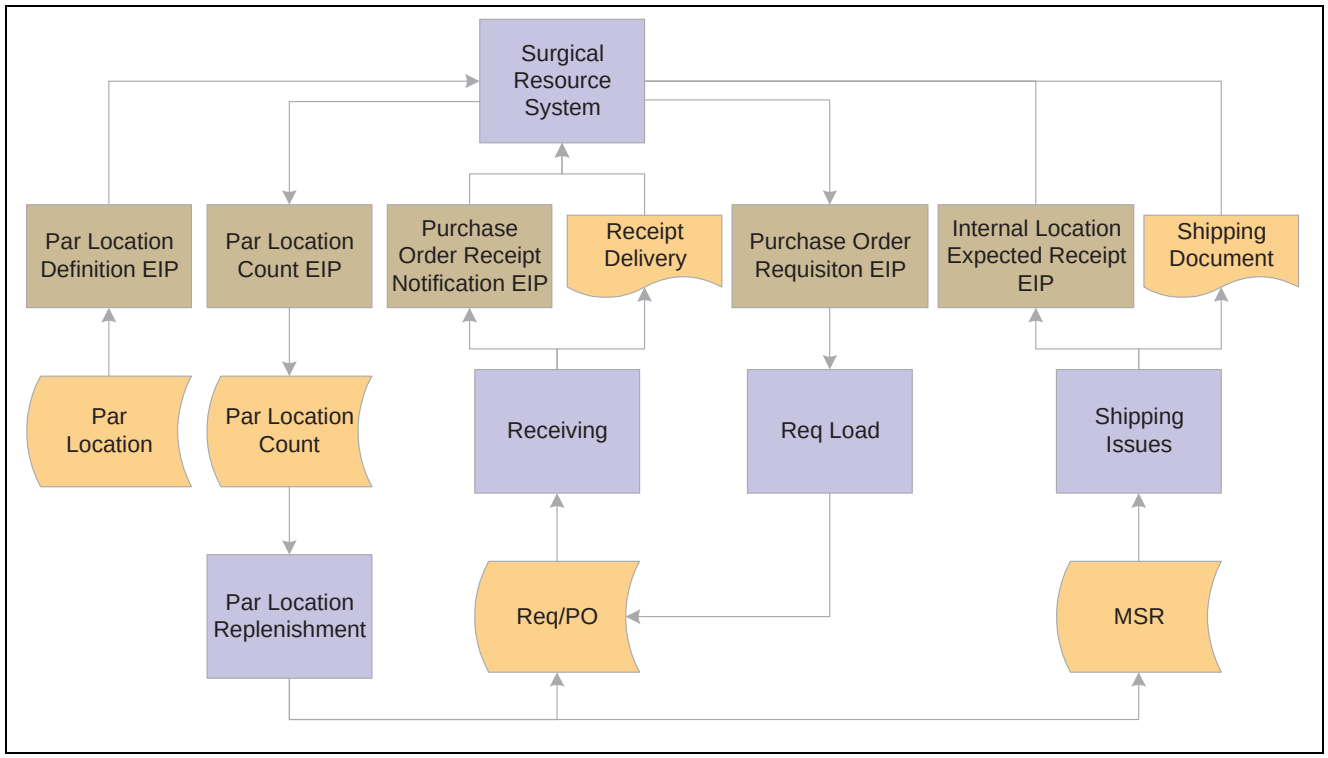
Using SRS Application EIPs

Five EIPs are used to exchange data between PeopleSoft Inventory and an SRS application. This section discusses the data flow and provides cross-references to information about the functional role and features of the following EIPs:

- Par Location EIP (outbound).
- Par Location Count EIP (inbound).
- Purchase Order Requisition EIP (inbound).
- Internal Location Expected Receipt EIP (outbound).
- Purchase Order Receipt Notification EIP (outbound).

Data Flow Between the PeopleSoft System and the SRS Application

The following diagram illustrates the data flow in an SRS application integration:



SRS application integration with a PeopleSoft system

SRS Application EIPs

This table provides cross-references to information about the functional role and features of the SRS service operations in PeopleSoft Integration Broker.

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Enterprise Integration Point	Reference
Par Location EIP (Outbound)	See Chapter 8, "Integrating With a Third-Party Surgical Resource Software Application," Implementing an SRS Application Integration, page 221.
Par Location Count EIP (Inbound)	See Chapter 8, "Integrating With a Third-Party Surgical Resource Software Application," Implementing an SRS Application Integration, page 221.
Purchase Order Requisition EIP (Inbound)	See Chapter 8, "Integrating With a Third-Party Surgical Resource Software Application," Implementing an SRS Application Integration, page 221.
Internal Location Expected Receipt EIP (Outbound)	See Chapter 8, "Integrating With a Third-Party Surgical Resource Software Application," Implementing an SRS Application Integration, page 221.
Purchase Order Receipt Notification EIP (Outbound)	See Chapter 8, "Integrating With a Third-Party Surgical Resource Software Application," Implementing an SRS Application Integration, page 221.

See Also

Chapter 2, "Understanding PeopleSoft Supply Chain Management Enterprise Integration Points," page 9

http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

Managing Errors for SRS EIPs

Error management is an integral part of the effectiveness of the PeopleSoft system of inbound EIPs. In the process of uploading data, the PeopleSoft subscription process detects any data errors and stores them in queues or staging tables for manual correction in the PeopleSoft system before updating any core PeopleSoft application tables.

Each inbound EIP that handles subscription of data from third-party applications has a respective transaction code that must be entered on an assigned data management page. The data management page allows access to the EIP's specific error correction page.

The Par Location Count EIP, which is used in both the SRS and point-of-use (POU) supplier system integrations, uses the transaction code *Par Loc,* which is entered on the Transaction Maintenance page. The Transaction Maintenance page is used to access error-correction pages for transactional data.

The Purchase Order Requisition EIP, which is used in the SRS integration, uses the transaction code *REQLOAD,* which is entered on the Data Definition Maintenance page. The Data Definition Maintenance page is used to access error-correction pages for definitional data.

See Also

Chapter 2, "Understanding PeopleSoft Supply Chain Management Enterprise Integration Points," page 9

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PART 5

Integrating to Electronic Data Collection Systems

Chapter 9
Designing an Electronic Data Collection System

Chapter 10
Using an Electronic Data Collection System

Chapter 11
Understanding Record Layouts for the Electronic Data Collection System

CHAPTER 9

Designing an Electronic Data Collection System

This chapter provides an overview of electronic data collection and discusses how to:

- Set up electronic data collection defaults.
- Set up labels.
- Set up the Uniform Code Council/European Article Numbering (UCC/EAN) manufacturer ID.
- Set up the wedge command code.
- Set up unit of measure.
- Set up picking.
- Set up putaway.

Understanding Electronic Data Collection

Electronic data collection offers many advantages. It enables you to:

- Increase the accuracy of data entry.
- Decrease the amount of time spent on data entry.
- Improve productivity.
- Save cost.

PeopleSoft applications use electronic data collection for key material movement transactions and support for bar code printing on standard reports and labels. You can use the electronic data collection components to capture data from multiple sources, such as bar code devices, external feeds, and direct data entry.

Bar code-enabled material movement transactions are based on an open architecture so that you can select the data collection solution for use with PeopleSoft applications. With this architecture, third-party or in-house data collection hardware and software can feed transactions originating from data collection devices into the PeopleSoft system using a common, predefined interface.

See Also

Chapter 10, “Using an Electronic Data Collection System,” page 233

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Setting Up Electronic Data Collection Defaults

To use an electronic data collection system with PeopleSoft applications, you must first set up system default information.

See Chapter 3, "Implementing Integrations," Setting Up Electronic Data Collections Defaults, page 90.

Setting Up Labels

To set up labels for data collection, use the Data Collection Label Setup (BCT_LABEL_FS_GBL) component. You must first select a label type to access the Data Collection Label Setup page. For example, you might select Container ID Label as the label type to identify containers at storage locations.

This section discusses how to set up data collection labels.

See Also

Chapter 10, "Using an Electronic Data Collection System," Generating Labels, page 239

Page Used to Set Up Labels

Page Name	Object Name	Navigation	Usage
Data Collection Label Setup	BCT_LABEL_FS	SCM Integrations, Barcode Labels, Setup Data Collection Labels, Data Collection Label Setup	At the SetID level, identify valid label formats that may be required when interfacing with a third-party label printing application.

Setting Up Data Collection Labels

Access the Data Collection Label Setup page.

Format ID

Enter an ID for a unique label design. A label type can have many format IDs. However, a format ID is not required. If the label printing application does not require a format ID, use this page to define the prefix and suffix for the file name of the label extract file.

The format ID can be anything that you choose. If the label printing application does not require a format ID in the extract file, then the format ID is for your reference only. If the label printing application does require a format ID in the extract file, you would enter the format ID that the application uses and select the Include Format check box.

The file name has an *xxxyyyyyzzzz* format, where *xxx* is the file prefix, *yyyyy* is the last five characters of the process instance ID, and *zzzz* is the file suffix. For example, if the file prefix is *GEN* and the suffix is *.LBL,* then the flat file generated by process instance 12345 would be named GEN12345.LBL.

Default

Select to set a format ID as the default that appears on the Label Generation page. If you do not select a default format ID, the first format ID listed becomes the default.

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File Prefix Enter the prefix for the file name of flat files generated for printing labels. This is an optional field

File Suffix Enter the suffix for the file name of any flat files generated for printing labels. If you want a period as part of the suffix, you must include it in the field. This is an optional field.

Include Format If this check box is selected, the format ID is inserted as the first field on every row in the label extract file.

Setting Up the UCC/EAN Manufacturer ID

To identify a manufacturer ID and starting container number, use the UCC/EAN Manufacturer component. You need to specify the manufacturer ID and starting container number for the label printing application in order to create a standard bar code accessible to all companies in the trading chain.

This section discusses how to specify the manufacturing ID.

Pages Used to Set Up the UCC/EAN Manufacturer ID

Page Name	Object Name	Navigation	Usage
UCC/EAN Manufacturer ID	BCT_MFGID_SETUP	SCM Integrations, Barcode Labels, Setup UCC/EAN Manufacturer ID, UCC/EAN Manufacturer ID	Specify the manufacturer ID and starting container number.

Specifying the Manufacturer ID

Access the UCC/EAN Manufacturer ID page.

Manufacturer ID Enter an ID that is included in the extract file for the shipping container labels so that it can be formatted by the label printing software to create an industry-standard bar code label.

Shipping Container Serial ID Enter an ID to uniquely identify the shipping container. Enter the starting container number, with up to nine digits, or leave it blank to start at 1. The shipping container serial ID is included in the extract file for the shipping container labels so that it can be formatted by the label printing software to create an industry-standard bar code label.

Setting Up the Wedge Command Code

To set up wedge command codes use the Set Up Wedge Command Code component.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Packing Orders for Shipment," Using Wedge Commands in Packing Sessions.

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Setting Up Unit of Measure

To associate items with units of measure use the Define Item component.

See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Working with Items," Using Units of Measure.

Setting Up Picking

To set up picking use the Setup Fulfillment component.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Setting Up Fulfillment at the Business Unit and Item Levels," Defining Business Unit Fulfillment Options.

Setting Up Putaway

To set up the Putaway Plan Report use the Putaway Plan Report component.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Receiving and Putting Away Stock," Generating the Putaway Plan Report.

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CHAPTER 10

Using an Electronic Data Collection System

This chapter provides an overview of electronic data collection and discusses how to:

- Use electronic data collection transactions.
- Use background transaction processes.
- Purge transactions.
- Generate labels.
- Manage files.

Understanding Electronic Data Collection

Electronic data collection enables you to:

- Increase the accuracy of data entry.
- Decrease the amount of time spent on data entry.

You can use the electronic data collection components to capture data from:

- Bar code devices.
- External feeds.
- Direct data entry.

The following diagram shows the data flow for electronic data collection:

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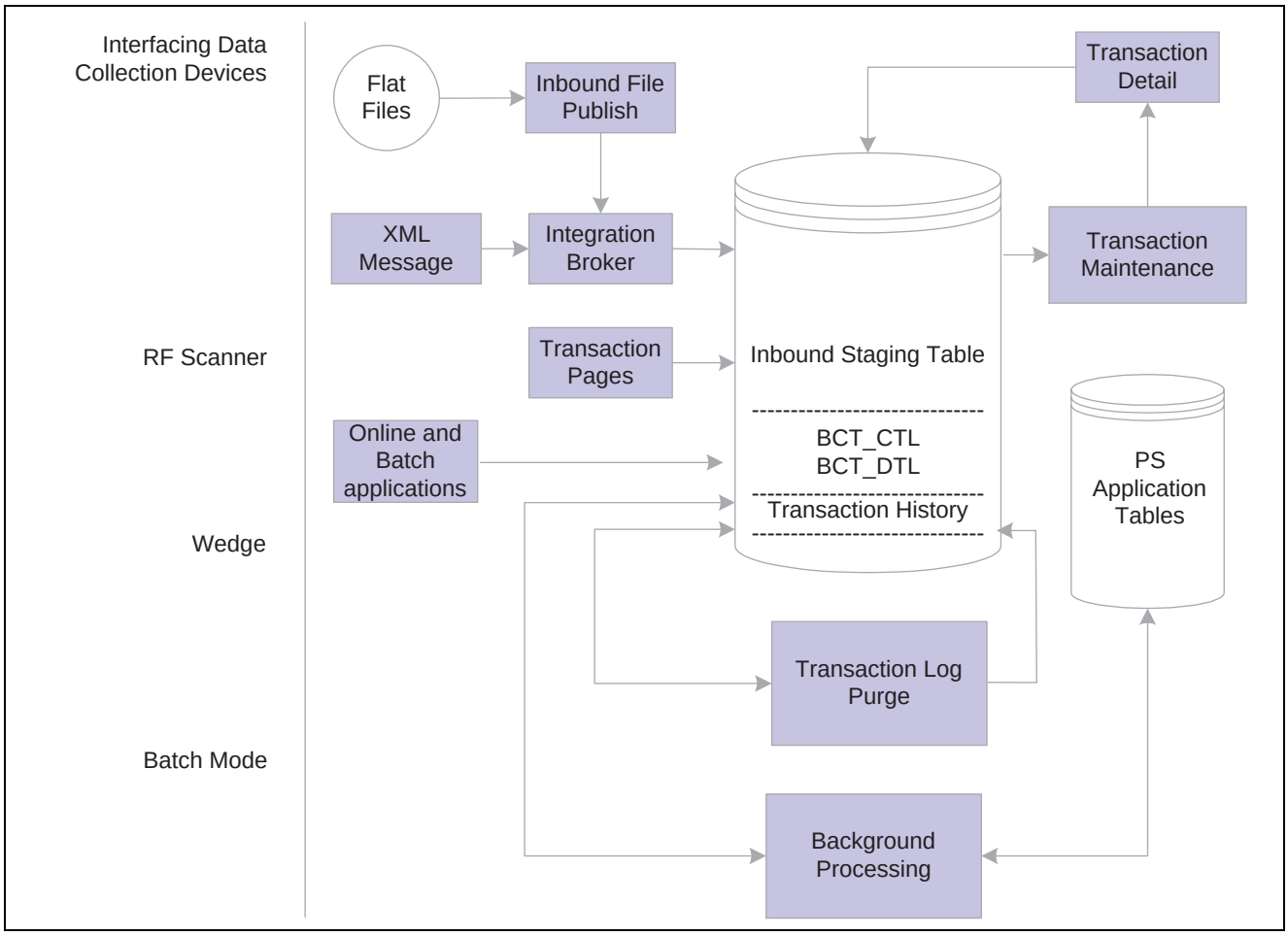

Electronic data collection data flow

See Also

Chapter 4, “Processing Enterprise Integration Points (EIPs),” Using Transaction Maintenance, page 103

Chapter 10, “Using an Electronic Data Collection System,” Purging Transactions, page 239

Device Selection

The first step in designing an electronic data collection system is to select the data collection devices you will use to process bar code material movement transactions. PeopleSoft provides support for three bar code technologies:

Radio Frequency

Radio frequency (RF) systems are used when immediate access to the database is required. This technology requires RF terminals and controllers. RF data collection applications, developed in-house or by third-party vendors, produce transactions that are passed to the PeopleSoft applications through PeopleSoft Integration Broker using XML messages.

Batch

Batch systems are used when real-time updates are not needed. Batch-oriented data collection applications, developed in-house or by a third-party vendor, produce transactions that are collected in an ASCII text file. The text file is loaded into the PeopleSoft system using the Inbound File Publish utility.

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Keyboard Wedge

Keyboard wedges can be used when the person collecting the bar-coded information has access to a workstation running the PeopleSoft application. A wand or a laser gun connects to the keyboard wedge that inputs the bar-coded information directly into the transaction pages. The computer interprets information entered using the keyboard wedge in the same manner as information entered using the keyboard.

See Also

Chapter 4, "Processing Enterprise Integration Points (EIPs)," Processing Inbound EIPs, page 103

Using Electronic Data Collection Transactions

Data collection transactions received through XML messages, batch oriented flat files, and the transaction pages are loaded into the transaction log. Background processes pick up these transactions, validate them, and then update the appropriate PeopleSoft application tables. If an error is found, the system does not process the transaction. The transaction's status on the transaction log is changed to *Error,* and the system inserts a row into the error table for each error message.

The BCt Errors Workflow process (IN_WFBCTERRS) checks for electronic data collection transactions that have an error status and generates a worklist entry. Once you process the worklist entry, the PeopleSoft system displays the Transaction Maintenance page, where you can view the errors and fix them.

Once you have modified the transaction and saved the Transaction Maintenance Detail page, the transaction can be reprocessed. Transactions that have been processed to the *Complete* status or that have been canceled in the Transaction Maintenance page can be archived and purged from the transaction log using the transaction purge process.

The background processes validate all information before performing any updates. However, when you enter the transactions through the data collection transaction pages, selected pieces of information on the page have edits to verify the data that is entered.

Transactions	Reference
Inventory Adjustments	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Making Stock Quantity Adjustments and Transfers Within the Business Unit".
Interunit Receiving	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Receiving and Putting Away Stock," Staging Interunit Transfers Using an Electronic Data Collection System.
Inventory Picking	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Picking Inventory," Entering Picking Feedback Using an Electronic Data Collection System.
Inventory Putaway	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Receiving and Putting Away Stock," Entering Stockroom Feedback Using an Electronic Data Collection System.

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Transactions	Reference
Inventory Transfer	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Making Stock Quantity Adjustments and Transfers Within the Business Unit".
Kanban Transfers	See *PeopleSoft Enterprise Flow Production 9.0 PeopleBook*, "Using Replenishment Sources," Understanding the Kanban Transfer Process.
Ship Containers and Serial IDs	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Packing Orders for Shipment," Working with Shipping Containers and Shipping Serial IDs Using an Electronic Data Collection System.
Shipping Request	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Shipping Inventory".
Production Picking	See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Issuing Material to Production," Processing Picking Plans Using Electronic Data Collection.
Kanban Replenishment Request	See *PeopleSoft Enterprise Flow Production 9.0 PeopleBook*, "Maintaining Kanban Cards and Replenishment Requests," Creating Replenishment Requests Using Electronic Data Collection.
Production Completions and Scrap	See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Recording Completions and Scrap Using Electronic Data Collection," Processing Electronic Data Collection Completions Transactions.
Production Multiple Outputs Completions and Scrap	See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Recording Completions and Scrap Using Electronic Data Collection," Processing Electronic Data Collection Completions Transactions.
Kanban Completions	See *PeopleSoft Enterprise Flow Production 9.0 PeopleBook*, "Using Replenishment Sources," Processing Kanban Completions.
Production Kit Issues and Returns	See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Issuing Material to Production," Processing Kit Issues and Returns Using Electronic Data Collection.

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Transactions	Reference
Component Issues and Returns	See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Recording Completions and Scrap Using Electronic Data Collection," Editing or Issuing Components.
Actual Hours	See *PeopleSoft Enterprise Manufacturing 9.0 PeopleBook*, "Recording Completions and Scrap Using Electronic Data Collection," Recording Actual Machine and Labor Hours.
Purchasing Receiving	See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Receiving Shipments," Receiving Items Using EDC.
Kanban Receiving	See *PeopleSoft Enterprise Flow Production 9.0 PeopleBook*, "Using Replenishment Sources," Using the Receive by Kanban ID Transaction.

See Also

http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

Using Background Transaction Processes

You set up electronic data collection background processes to scan the transaction log continuously as long as there are transactions in the log with the status *New* or *Reprocess*. If no transactions with the status *New* or *Reprocess* are in the log when a process scans the log, the process shuts down. If the process shuts down, you can restart it with PeopleSoft Process Scheduler. Because you can set up Process Scheduler to automatically restart the background processes at predefined intervals, transaction processing can occur continuously or at set periods throughout the day.

Transaction	Page Name	Process Name	Tables Accessed	Tables Updated
Inventory Adjustments	BCT_INV_REQIADJ	INPVIADJ	BCT_INV_REQIADJ	BCT_INV_REQIADJ
Interunit Receiving	BCT_INV_REQIURV	INPJIURV	BCT_INV_REQIURV	BCT_INV_REQIURV
Inventory Picking and Shipping	BCT_INV_REQPICK	IN_FUL_PFB	BCT_INV_REQPICK	BCT_INV_REQPICK

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Transaction	Page Name	Process Name	Tables Accessed	Tables Updated
Inventory Putaway	BCT_NV_ REQPWFB	INPZPTWY	BCT_NV_ REQPWFB	BCT_NV_ REQPWFB
Inventory Transfers	BCT_INV_ REQTRFR	INPTTRFR	BCT_INV_ REQTRFR	BCT_INV_ REQTRFR
Physical Inventory	BCT_INV_ REQPHYS	INPIPHYS	BCT_INV_ REQPHYS	BCT_INV_ REQPHYS
Ship Containers and Serial IDs	BCT_INV_ REQSHPM	INPFSHPM	BCT_INV_ REQSHPM	BCT_INV_ REQSHPM
Shipping Request	BCT_INV_ REQFUL	INV_FUL_BCT	RUN_CNTL_IN_ FUL	RUN_CNTL_IN_ FUL
Production Picking	BCT_MG_ REQPIK	SFPEPICK	BCT_MG_ REQPIK	BCT_MG_ REQPIK
Kanban Replenishment Requests	BCT_MG_ REQREPL	FPPAREPL	BCT_MG_ REQREPL	BCT_MG_ REQREPL
Production and Completions Scrap	BCT_MG_ REQCOMP	SFPDCDRV	BCT_MG_ REQCOMP	BCT_MG_ REQCOMP
Kit Issues and Returns	BCT_MG_ REQMISC	SFPFMISC	BCT_MG_ REQMISC	BCT_MG_ REQMISC
Actual Hours	BCT_MG_ REQACT	SFPGACTH	BCT_MG_ REQACT	BCT_MG_ REQACT
Load Purchase Order Receipts	RUN_RECVLOAD	PO_RECVLOAD	RUN_CNTL_ RECVLD	RUN_CNTL_ RECVLD

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See Also

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

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Packing Orders for Shipment," Working with Shipping Containers and Shipping Serial IDs Using an Electronic Data Collection System

PeopleSoft Enterprise Flow Production 9.0 PeopleBook, "Maintaining Kanban Cards and Replenishment Requests," Creating Replenishment Requests Using Electronic Data Collection

PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, "Issuing Material to Production," Processing Picking Plans Using Electronic Data Collection

PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, "Recording Completions and Scrap Using Electronic Data Collection," Processing Electronic Data Collection Completions Transactions

PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, "Issuing Material to Production," Processing Kit Issues and Returns

PeopleSoft Enterprise Manufacturing 9.0 PeopleBook, "Recording Completions and Scrap Using Electronic Data Collection," Running the Actual Hours Data Collection COBOL/SQL Process

Purging Transactions

You can periodically purge data collection transactions. The data collection architecture uses the standard purge process for PeopleSoft Supply Chain Management inbound transactions.

See Also

Chapter 4, "Processing Enterprise Integration Points (EIPs)," Purging Transactions, page 107

Generating Labels

To generate bar code labels, you must first set up the attributes for each label type on the Label Setup page. Next, you generate a flat file containing the label data by running a PeopleSoft Process Scheduler Structured Query Report (SQR) program from the label-specific run control page. Use the Generate Labels component to create this flat file. Finally, you pass the flat file to an in-house or a third-party bar code label product to print the labels.

The PeopleSoft system can print 10 types of labels:

Purchasing Receipt labels	Use these labels to track items that are received by the business unit. Receiving labels are generated for each item on a receipt. To print these labels, you must have PeopleSoft Purchasing installed.
Production Completion labels	Apply these labels to items that have been manufactured. To print these labels, you must have PeopleSoft Enterprise Manufacturing installed.

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Pull Ticket labels	Use these labels to track material replenished from online replenishment requests. To print these labels, you must have PeopleSoft Flow Production installed.
Kanban Card labels	Use these labels to track material replenished by Kanban Card. To print these labels, you must have PeopleSoft Flow Production installed.
Storage Location labels	Use these labels on storage locations, such as aisles, rows, and bins, in a business unit. To print these labels, you must have PeopleSoft Inventory installed.
Item Storage labels	Use these labels to identify items in a carton or storage location. To print these labels, you must have PeopleSoft Inventory installed.
Storage Container labels	Use these labels to identify storage containers at a storage locations. To print these labels, you must have PeopleSoft Inventory installed.
Shipping Carton labels	Apply these labels to each carton before shipping to provide shipping information to shipping personnel and carriers. You can also use them to build shipping containers, and to provide customer-specific information that identifies items within the cartons. To print these labels, you must have PeopleSoft Inventory installed.
Shipping Serial labels	Use these labels to identify a serial ID assigned to items at the time the items are shipped. To print these labels, you must have PeopleSoft Inventory installed.
Shipping Container labels	Use these labels to identify shipping containers. Shipping container labels can be used to provide shipping information to shipping personnel, carriers, and customers. To print these labels, you must have PeopleSoft Inventory installed.
Item Usage labels	Use these labels to identify medical supplies used for patients. To print these labels, you must have PeopleSoft Inventory installed.

See Also

Chapter 9, “Designing an Electronic Data Collection System,” Setting Up Labels, page 230

Managing Files

This section discusses how you work with files when generating labels.

Override File

To specify a file directory and file name for the extraction file, select the Override File check box, and enter the file directory and file name. Leave the Override File check box clear to create the extraction file in the default directory with the default file name.

File Directory

Enter a directory path for the label file.

If you do not select the Override File check box, on any label except the Carton Label, the directory is selected according to the following hierarchy:

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1. The directory name is the FILEPREFIX that was specified in SETENV.SQC during the initial system setup.

   For information on setting the FILEPREFIX in the SETENV.SQC, refer to the *PeopleTools Installation and Administration* for the platform.

2. If no FILEPREFIX was specified during system setup, the directory name is by default the current work directory on the server running the label program.

File Name

Enter a file name for the label file.

If you do not select the Override File check box, on any label except the carton label, the file is named according to the following hierarchy:

1. The file name is the file prefix that is defined for the format ID (on the Data Collection Label Setup page in the Generate Labels window) combined with the last five digits of the process ID; the file name suffix is the file suffix defined for the format ID.
2. If no format ID is specified on the Data Collection Label Setup page, the last five digits of the process ID are used as the file name, and the file name suffix is the file suffix defined on the Data Collection Setup page in Process Transactions.
3. If no file suffix is defined on the Data Collection Setup page, the last five digits of the process ID are used as the file name, and the file name suffix is the FILESUFFIX that you specified in SETENV.SQC when you initially set up the system.

   For information on setting the FILESUFFIX in the SETENV.SQC, refer to the installation documentation.

4. If no file suffix was specified in SETENV.SQC when you initially set up the system, the last five digits of the process ID are used as the file name, and no suffix is appended.

The following table indicates the sequence of defaults that the system uses when assigning file names:

File Prefix	File Name	File Suffix
Override	Override	Override
From format ID specified on the Data Collection Label Setup page.	The last five digits of the process ID. If multiple requests can be entered on the label request page, then an additional two-digit sequential number starting with *01* is appended to the end of the file name.	From format ID specified on the Data Collection Label Setup page.
None	The last five digits of the process ID. If multiple requests can be entered on the label request page, then an additional two-digit sequential number starting with *01* is appended to the end of the file name.	The file suffix defined on the Data Collection Setup page.

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File Prefix	File Name	File Suffix
None	The last five digits of the process ID. If multiple requests can be entered on the label request page, then an additional two-digit sequential number starting with *01* is appended to the end of the file name.	The FILESUFFIX that you specified in SETENV.SQC.
None	The last five digits of the process ID. If multiple requests can be entered on the label request page, then an additional two-digit sequential number starting with *01* is appended to the end of the file name.	None.

See Also

Chapter 9, "Designing an Electronic Data Collection System," Setting Up Labels, page 230

Chapter 10, "Using an Electronic Data Collection System," Printing Shipping Carton Labels, page 249

Common Elements Used in This Section

Language Select a language for the legible portion of the labels.

Business Unit or Unit Select the unit for which to print labels.

Format ID Enter a label format ID. Label formats are defined on the Data Collection Label Setup page. If you set up a default label format, its ID appears in this field.

Copies Enter the number of copies of each label to print. When printing serial or sequential labels, if you increase the number in this field, the system multiplies the number of labels that you print. For example, if you are printing six labels in a sequence, and the number of copies is *1,* then six labels print. However, if the number of copies is *2,* then two copies of each label print, for a total of 12 labels.

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Pages Used to Print Labels

Page Name	Object Name	Navigation	Usage
Purchasing Receipt Labels	RUN_PO_RECEIPT	• SCM Integrations, Barcode Labels, PO Receipt Label, PO Receipt Labels • Purchasing, Receipts, Reports, Receipt Labels, PO Receipt Labels • Purchasing, Receipts, Process Receipts	If you have PeopleSoft Purchasing installed, select the process request parameters for purchasing receipt labels. Purchasing receipt labels are used to track items that are received by the business unit. Receiving labels can be generated for each item on a receipt.
Completion Label - Production Select	RUN_SFS7004	SCM Integrations, Barcode Labels, Completion Label, Production Select	Select the business unit for which to print labels. You can also indicate whether printed labels are based on a production ID or production schedule.
Completion Label - Completion Labels	RUN_SFS7004B	SCM Integrations, Barcode Labels, Completion Label, Completion Labels	Select the number of labels to print.
Pull Ticket/Pull List Options	RUN_FPS6500	• Manufacturing Definitions, Kanban, Electronic Kanbans, Print Pull Ticket/Pull List, Pull Ticket/Pull List Options • SCM Integrations, Barcode Labels, Pull Ticket Label, Pull Ticket/Pull List Options	Indicate how you want to print pull tickets and pull lists.
Pull Ticket/Pull List Range	RUN_FPS6500A	• Manufacturing Definitions, Kanban, Electronic Kanbans, Print Pull Ticket/Pull List, Pull Ticket/Pull List Range • SCM Integrations, Barcode Labels, Pull Ticket Label, Pull Ticket/Pull List Range	Make the printing selection.
Print Kanban Card	RUN_FPS6510	• SCM Integrations, Barcode Labels, Kanban Card Label, Print Kanban Cards • Manufacturing Definitions, Kanban, Kanban Cards, Print Kanban Cards	Print Kanban Card labels.

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Page Name	Object Name	Navigation	Usage
Kanban Card Range	RUN_FPS6510A	• SCM Integrations, Barcode Labels, Kanban Card Label, Kanban Card Range • Manufacturing Definitions, Kanban, Kanban Cards, Print Kanban Cards, Kanban Card Range	Select the kanban card label range.
Storage Location Label	RUN_INS9025	SCM Integrations, Barcode Labels, Storage Location Label	Select the process request parameters for printing bar code labels for storage locations.
Item Storage Label	RUN_INS9010	SCM Integrations, Barcode Labels, Item Storage Label	Select the process request parameters for printing bar code labels for items in storage.
Storage Container Label	RUN_INS9015	SCM Integrations, Barcode Labels, Storage Container Label	Select the process request parameters for printing container labels for storage container IDs.
Shipping Carton Label	RUN_INS6025	SCM Integrations, Barcode Labels, Shipping Carton Label	Select the process request parameters for shipping carton labels. The shipping carton labels can be automatically printed during picking.
Shipping Serial Label	RUN_INS6035	SCM Integrations, Barcode Labels, Serial Label	Select the process request parameters for shipping serial labels. If you assign a shipping serial label ID at shipping time, you can track items after they have been shipped.
Shipping Container Label	RUN_INS6030	SCM Integrations, Barcode Labels, Shipping Container Label	Select the process request parameters for shipping container labels.
Item Usage Label page	RUN_INS6040	SCM Integrations, Barcode Labels, Item Usage Label	Select the process request parameters for item usage labels.

Printing Purchasing Receipt Labels

Access the Purchasing Receipt Labels page.

To print all receiving labels staged by the user ID:

1. Select the Reprint Labels check box to reprint receiving labels.

   The Business Unit, Receiver ID Number and Receiver Line Number fields will become available for entry if the Reprint Labels check box is selected.

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2. Select the receiver ID number for which you want to reprint labels.
3. Enter the receiver line number for the item and quantity for which you want to reprint labels.

Process Type

SQR Report

Tables Accessed

BCT_LABEL_FS

BCT_SETUP_FS

RECV_RUN_CNTL

RECV_LABEL_TBL

SET_CNTRL_REC

SET_CNTRL_TREE

RECV_LN

RECV_LN_ASSET

BU_ITEMS_INV

Tables Updated

RECV_LABEL_TBL

Printing Completion Labels

Access the Completion Labels page.

To print completion labels by production ID or by production schedule:

1. To print completion labels by production ID, enter the production ID.
2. To print completions labels by production schedule, enter the production area and item ID.

   If the item is revision controlled, select a revision code if the revision is required on the labels.
3. Once the process request parameters are entered, click the Search button to access the Completion Labels page.

Note. If the conversion rate between the standard unit of measure (UOM) and the standard pack UOM is not set up for this item, the page produces an error message, and the system does not display the Completion Labels page.

Tables Accessed

MASTER_ITEM_TBL

INV_ITEMS

BCT_LABEL_FS

BCT_SETUP_FS

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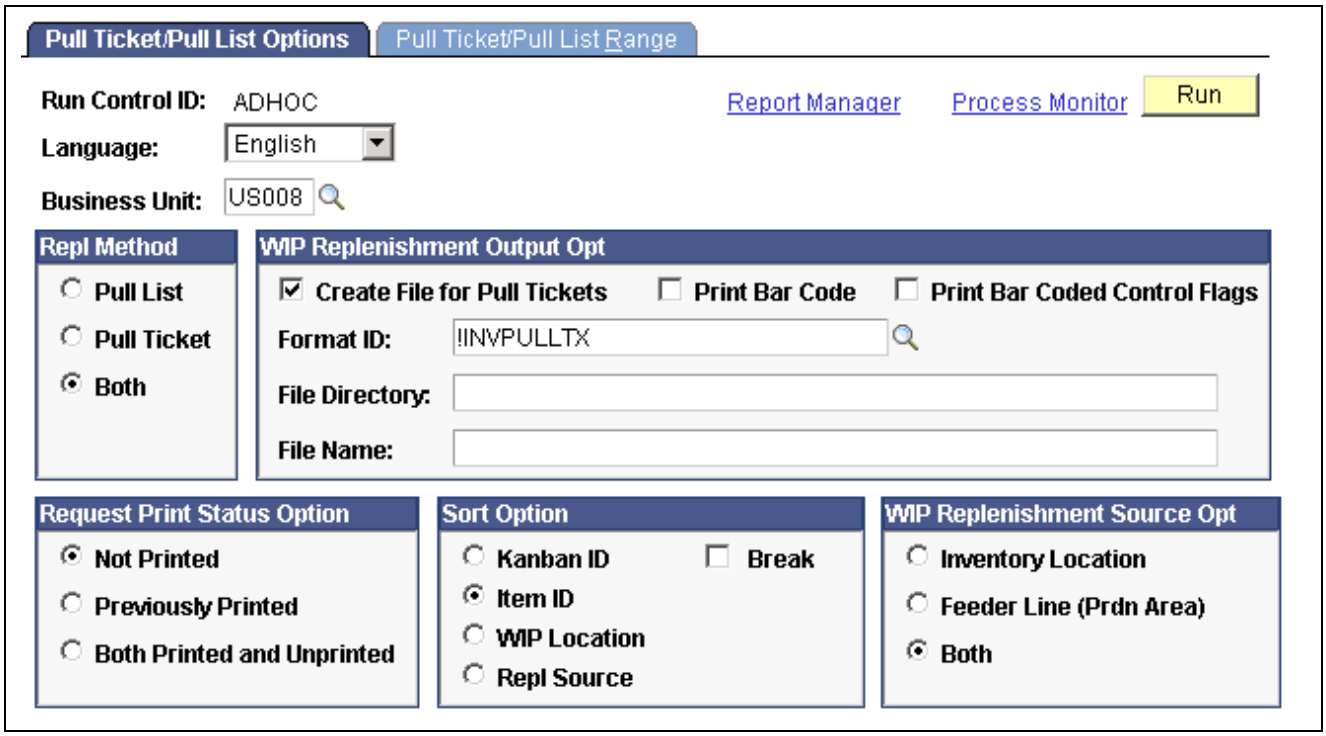
RUN_CNTL_SF

Tables Updated

RUN_CNTL_SF

Printing Pull Ticket Labels

Access the Pull Ticket/Pull List Options page.



Pull Ticket/Pull List Options page

To print pull ticket labels:

1. Select Create File for Pull Tickets to create an extract file.

   You can use this file to download pull ticket information to label generation software. If you select the Print Bar Codes check box, the system prints bar codes for bar coded fields on the pull ticket.

2. Select the Print Bar Coded Control Flags check box to print bar code control flag information.

   Bar coded control flags are item attributes flags. PeopleSoft Flow Production uses serial control and lot control flags.

See Also

PeopleSoft Enterprise Flow Production 9.0 PeopleBook, "Setting Up PeopleSoft Flow Production," Setting Up WIP Replenishment Item Attributes

PeopleSoft Enterprise Flow Production 9.0 PeopleBook, "Maintaining Kanban Cards and Replenishment Requests," Understanding Kanban Cards and Production Replenishment Requests

Printing Kanban Card Labels

Access the Print Kanban Cards page.

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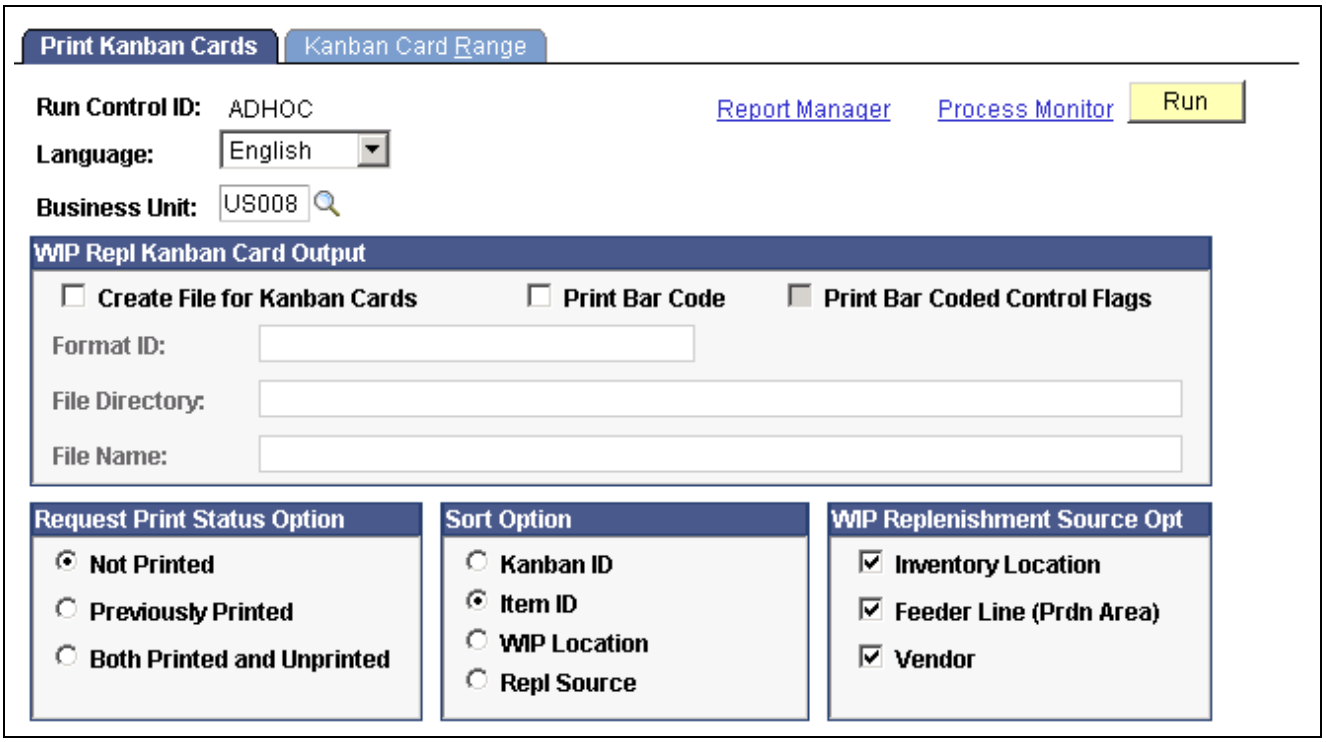

Print Kanban Cards page

To print Kanban Card labels:

1. Select Create File for Kanban Cards to create an extract file.

   You can use this file to download kanban card information to label generation software. If you select thePrint Bar Code check box, the system prints bar codes for bar coded fields on the kanban card.

2. Select the Print Bar Coded Control Flags check box to print bar code control flag information.

   Bar coded control flags are item attributes flags. PeopleSoft Manufacturing uses serial control and lot control flags.

3. Select a format ID for the extract file.

4. Enter the file directory and file name to which you want to save the kanban card label file extract.

See Also

PeopleSoft Enterprise Flow Production 9.0 PeopleBook, "Setting Up PeopleSoft Flow Production," Setting Up WIP Replenishment Item Attributes

PeopleSoft Enterprise Flow Production 9.0 PeopleBook, "Maintaining Kanban Cards and Replenishment Requests," Understanding Kanban Cards and Production Replenishment Requests

Selecting the Kanban Card Label Range

See *PeopleSoft Enterprise Flow Production 9.0 PeopleBook*, "Maintaining Kanban Cards and Replenishment Requests," Understanding Kanban Cards and Production Replenishment Requests.

Printing Storage Location Labels

Access the Storage Location Label page.

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To print storage location labels:

1. Select the storage areas for which you want to print labels in the storage area fields.

   If you select only the first level, the system prints labels for all the storage locations in that area down to the lowest level.
2. If you want to print labels for all the locations in your warehouse, then you would enter the area fields only to the warehouse level.
3. If you want to print labels for all the bins in an aisle, then you would enter the storage area fields down to the aisle level.

Tables Accessed

BCT_LABEL_FS

BCT_SETUP_FS

STOR_LOC_INV

Tables Updated

RUN_CNTL_IN

Printing Item Storage Labels

Access the Item Storage Label page.

To print item storage labels:

1. Select the Autogenerate Labels check box to have the system automatically generate all the item labels that you need for a storage location.
2. The Stor Loc (storage location) fields are required only if you use the Autogenerate Labels option.

   Use these fields if you want to print labels for all the items in a specific storage location.
3. If you select Autogenerate Labels and enter a storage area, you can enter the unit of measure by which you want to print the labels in the Group UOM (group unit of measure) field.

   For example, Location B01 has a quantity of *100 EA* (each). You select group UOM of *CS* (case). If there are 25 each per case, then the system generates four labels. If you select a group UOM of *EA* (each), then the system generates 100 labels.
4. If you select a serial-controlled item, the Group UOM field automatically appears with the standard unit of measure for the item and is unavailable for entry.

   One label per serial ID is printed.
5. If you enter a storage area for a lot-controlled, serial-controlled, staged date tracked, or actual costed item, the system verifies that the item exists in the specified storage area.

Tables Accessed

BCT_LABEL_FS

BCT_SETUP_FS

BU_ITEMS_INV

INV_ITEMS

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INV_STCK_UOM_VW

MASTER_ITEM_TBL

PO_RECEIVED_INV

Tables Updated

RUN_CNTL_IN

Printing Storage Container Labels

Access the Storage Container Labels page.

To print storage container labels:

1. Select a storage container prefix in the Beg Seq (beginning sequence) field.

   The storage container prefixes are defined on the Automatic Numbering page.

2. Enter the number of labels that you want to print in the Nbr in Seq (number in sequence) field.

   The next sequence of labels for the storage container prefix that you entered are printed. The last sequence number used for the storage container prefix that you entered is saved in the system.

Tables Accessed

BCT_LABEL_FS

BCT_SETUP_FS

AUTO_NUM_TBL

Tables Updated

AUTO_NUM_TBL

RUN_CNTL_IN

Printing Shipping Carton Labels

Access the Shipping Carton Label page.

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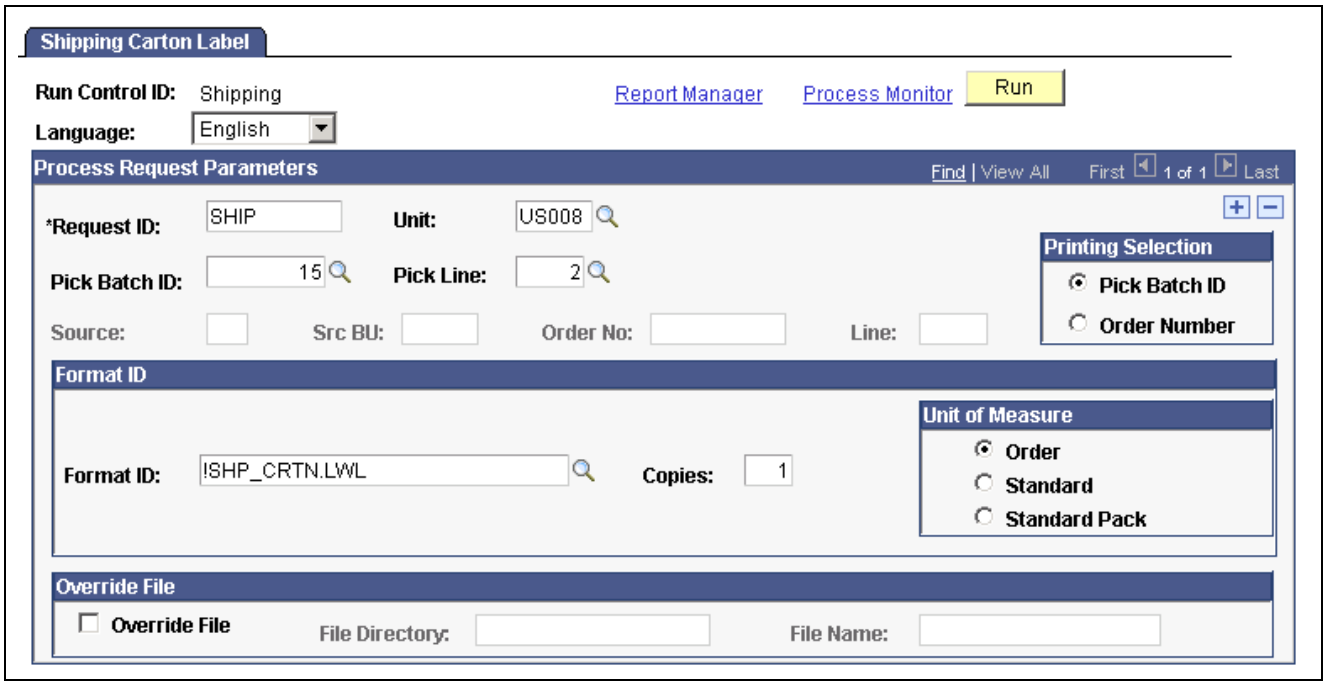

Shipping Carton Label page

If the format ID is not entered, it automatically appears first from the ship to location, then from the sold to location, or then from the Label Setup page, in that order, depending on which of these values exist.

To specify a file directory and file name for the label extraction file, select the Override File check box, and enter the file directory and file name. Leave the Override File check box clear to create the extraction file in the default directory with the default file name.

To select the directory for the carton label file, use the following hierarchy:

1. The path you specify for the file directory takes precedence.
2. If you do not specify a file directory, the directory automatically appears the Pick Plan Bar Coding Options page in the Setup Fulfillment component (ORDER_FULF_SETUP).
3. If no directory is specified on the Pick Plan Bar Coding Options page in the Setup Fulfillment component, the directory name is the FILEPREFIX that was specified in SETENV.SQC during the initial system setup.

   For information on setting the FILEPREFIX in the SETENV.SQC, refer to the installation documentation.
4. If no FILEPREFIX was specified during system setup, the directory name defaults to the current directory where the label program is running.

To name the file for the carton label file, use the following hierarchy:

1. The file name specified in the File Name field takes precedence.
2. If you don't specify a file name, the file name is the file prefix defined on the Pick Plan Bar Coding Options page in the Setup Fulfillment component combined with the last five digits of the process ID and the file suffix defined on the Pick Plan Bar Coding Options page.
3. If nothing is specified on the Pick Plan Bar Coding Options page, the last five digits of the process ID are used as the file name and the file name suffix is the FILESUFFIX that you specified in SETENV.SQC when you initially set up the system.

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For information on setting the FILESUFFIX in the SETENV.SQC, refer to the installation documentation.

4. If no FILESUFFIX was specified in SETENV.SQC when you initially set up the system, the last five digits of the process ID are used as the file name and no suffix is appended.

File Prefix	File Name	File Suffix
Override	Override	Override
The file prefix defined on the Pick Plan Bar Coding Options page in the Setup Fulfillment component.	The last five digits of the process ID. If multiple requests can be entered on the label request page, then an additional two-digit sequential number starting with *01* is appended to the end of the file name.	The file suffix defined on the Pick Plan Bar Coding Options page in the Setup Fulfillment component.
None	The last five digits of the process ID. If multiple requests can be entered on the label request page, then an additional two-digit sequential number starting with *01* is appended to the end of the file name.	The FILESUFFIX that you specified in SETENV.SQC.
None	The last five digits of the process ID. If multiple requests can be entered on the label request page, then an additional two-digit sequential number starting with *01* is appended to the end of the file name.	None.

Tables Accessed

BCT_LABEL_FS

BCT_SETUP_FS

BU_ITEMS_INV

CARRIER_ID

CUST_ADDRESS

CUST_SHIPTO_OPT

CUST_SOLDTO_OPT

IN_DEMAND

DF_SETUP_INV

DF_SETUP_IT_INV

INV_ITEM_UOM

INV_ITEMS

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ISSUE_HDR_INV

LOCATION_TBL

MASTER_ITEM_TBL

ORD_LINE

Tables Updated

RUN_CNTL_IN

Printing Shipping Serial Labels

Access the Shipping Serial Labels page.

Tables Accessed

AUTO_SERIAL_NUM

BCT_LABEL_FS

BCT_SETUP_FS

Tables Updated

AUTO_SERIAL_NUM

RUN_CNTL_IN

Printing Shipping Container Label

The UCC/EAN manufacturer ID is included in the extract file for the shipping container labels. The UCC/EAN manufacturer ID along with the shipping container serial ID provide a unique identifier to create a unique shipping ID for the shipping container.

Note. You cannot print shipping container labels for more than one location at a time. If the criteria that you specify include multiple ship to locations, a warning message appears requesting that you narrow the criteria until only one ship to location is included.

Tables Accessed

BCT_LABEL_FS

BCT_MFGID_SETUP

BCT_SETUP_FS

CARRIER_ID

CUST_ADDRESS

CUST_SHIPTO_OPT

CUST_SOLDTO_OPT

IN_DEMAND

ISSUE_HDR_INV

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LOCATION_TBL

ORD_LINE

Tables Updated

BCT_MFGID_SETUP

IN_DEMAND

RUN_CNTL_IN

See Also

Chapter 9, “Designing an Electronic Data Collection System,” Setting Up the UCC/EAN Manufacturer ID, page 231

PeopleSoft Enterprise Inventory 9.0 PeopleBook, “Packing Orders for Shipment,” Understanding Shipping Containers and Packing Sessions

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CHAPTER 11

Understanding Record Layouts for the Electronic Data Collection System

This chapter discusses:

- Par location count and physical accounting file formats.
- Label extract file record definitions.
- Picking plan extract file record definitions.

Note. The information in this chapter is formatted so that a field-specific notes section follows each table. The field-specific notes section includes further details about the fields in the preceding table that are marked with an asterisk (*).

PeopleSoft currently does not support the creation of extract files for labels, paperless picking, par location replenishment, or physical accounting from processes on MVS servers. For these environments, the system supports the extract files by running processes using an application server.

Par Location Count and Physical Accounting File Formats

PeopleSoft Inventory provides two transactions that can be processed using batch flat files that are downloaded and uploaded using SQR programs.

The system uses batch processes to generate a flat file containing the item to be counted for either of the transactions. The flat file is passed to a third-party electronic data collection system that performs the count. The flat file must then be returned to PeopleSoft in the same format.

The files that you download to and upload from electronic data collection devices must conform to these rules:

- The file name must be eight characters or less.

  An extension of .upl is automatically appended to upload file names. An extension of .dwn is automatically appended to download file names.
- The first field must start in column one.
- There must be a single blank space between each field.
- All fields must be left-justified.
- The system expects the file that is read by the upload process to have a .upl extension.

Par Location Count

You can download par location count information for use in a hand-held bar code device. You can select the following options to download:

- One par location at a time.

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- All par locations for a par location group.
- All par locations for a specified business unit.
- All par locations.

Below is the layout of the par location download and upload file.

The download process creates a .dwn file of 404 characters per record from the par location definition tables (CART_ATTRIB_INV and CART_TEMPL_INV). The upload expects the same file layout, 404 characters per record as a .upl file. The upload process updates the par location count tables (CART_CT_INF_INV). Each par location is created with an unprocessed status, and you can view them on the Par Location Count Inquiry page.

Contents	Format
BUSINESS_UNIT	5
INV_CART_ID	15
CART_GROUP	5
CART_REPLEN_OPT *	2
SHADOW_FLAG *	1
QTY_OPTION *	2
INV_ITEM_ID	18
DESCR	30
COMPARTMENT	10
COUNT_ORDER	4
COUNT_REQUIRED *	1
SUFFICIENT_STOCK *	1
CART_REPLEN_CTRL *	2
CART_COUNT_QTY *	16
DEFAULT_QTY	16

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Contents	Format
QTY_OPTIMAL	16
FOQ (Fixed Order Qty)	16
QTY_MAXIMUM	16
UNIT_OF_MEASURE	3
DISTRIB_TYPE	10
DEPTID	10
TRANSFER_COST	15
PRICE_MARKUP_PCT	15
CHARGE_CODE	20
ACCOUNT	10
ALTACCT	10
OPERATING_UNIT	8
PRODUCT	6
PROJECT_ID	15
CONS_NON_STOCK	1
BCKORDR_CNCL_FLAG	1
CHANGE_MARKUP_AMT	16
CHANGE_MARKUP_PCNT	15
MATERIAL_RECON_FLG	1

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Contents	Format
USG_TRCKNG_METHOD	2
LAST_OPRID	8
LAST_DTTM_UPDATE	26

Field-Specific Notes

See the field-specific information that follows.

CART_REPLEN_OPT

Specifies the way in which an item is to be replenished.

01 [Symbol_Wingdings_224] “stk” or “stock” (creates an MSR).

02 [Symbol_Wingdings_224] “less” or “stockless” (creates a staged purchase order).

03 [Symbol_Wingdings_224] “nons” or “non-stock” (creates a requisition).

04 [Symbol_Wingdings_224] “not replenished” (item is not to be replenished).

Note. The system uses stockless and non-stock replenishment options only if PeopleSoft Purchasing is installed.

SHADOW_FLAG

The shadow par location flag, which has an online label of *not replenished,* appears on the hand-held bar code device. This informs the user that this par location is not to be replenished.

QTY_OPTION

A hand-held bar code device can modify this field.

The quantity options for each par location count appears by default based on the default quantity option that you defined on the Par Location Group Definition page.

If the default quantity option is count, the system prompts the user to enter the quantity on hand on the par location. If the default quantity is request, the system prompts the user to enter the requested quantity.

Values are:

01 [Symbol_Wingdings_224] “c” or “count qty.”

02 [Symbol_Wingdings_224] “r” or “request qty.”

COUNT_REQUIRED

The COUNT_REQUIRED flag is evaluated to determine whether a count must be entered for an item. This flag is defined per item on the Par Location Group Definition page.

SUFFICIENT_STOCK

A hand-held bar code device can modify this field.

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The SUFFICIENT_STOCK flag is available for entry on the hand-held bar code device if the quantity option is *count qty.* PeopleSoft provides this field, so that the user does not need to enter a count for that item if it is not necessary.

CART_REPLEN_CTRL

Identifies how the order quantity is to be calculated if the quantity option is set to count quantity.

01 [Symbol_Wingdings_224] “Par”

02 [Symbol_Wingdings_224] “FOQ” or “Fixed Order Qty”

03 [Symbol_Wingdings_224] “Min/Max”

CART_COUNT_QTY

A hand-held bar code device can modify this field.

The quantity options for each par location count appears by default based on the default quantity option that you defined on the Par Location Group Definition page.

If the default quantity option is count, the system prompts the user to enter the quantity on hand on the par location. If the default quantity is request, the system prompts the user to enter the requested quantity.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, “Managing Par Inventory”

Physical Accounting

You can use a hand-held bar code device to conduct your physical counting event. To ensure data transfer accuracy, first configure the download and upload file formats for the counting sheet according to the layout presented in the next table. All fields must be left-justified, with a space between each field.

Field	Comments	Format
INV_ITEM_ID	Required.	Char 18
STORAGE_AREA	Required.	Char 5
STOR_LEVEL_1	Required, if set up for the storage area.	Char 4
STOR_LEVEL_2	Required, if set up for the storage area.	Char 4
STOR_LEVEL_3	Required, if set up for the storage area.	Char 4
STOR_LEVEL_4	Required, if set up for the storage area.	Char 4

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Field	Comments	Format
UNIT_OF_MEASURE	Required. Must contain the stocking unit of measure (UOM) at the location.	Char 3
STAGED_DATE	Required. If the item is staged-date controlled, this field must contain the appropriate staged date. If the item is not staged-date controlled, include the filler default value that you established on the Installation Options - Inventory page in the Installation Options component.	MMDDYYYY
SERIAL_ID	Required. If the item is serial-controlled, this field must contain the appropriate serial ID. If the item is not serial-controlled, include the filler default value that you established on the Installation Options - Inventory page in the Installation Options component.	Char 20
INV_LOT_ID	Required. If the item is lot-controlled, this field must contain the appropriate lot ID. If the item is not lot-controlled, include the filler default value that you established on the Installation Options - Inventory page in the Installation Options component.	Char 15
CONTAINER_ID	Optional.	Char 10
QTY	Required. Must contain a quantity; zero is valid.	Nbr 16
UNIT_OF_MEASURE_COUNT	Required. Must contain a valid UOM for the item. If this UOM is different than the stocking UOM noted above, then the quantity is converted to the stocking UOM before updating the database.	Char 3

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Field	Comments	Format
ITEM_DESCR	Optional. For informational purposes only.	Char 30
COUNT_DTTM	Must contain a date. If the field is blank then the system does not update the row.	MM/DD/YYYY HH:MI:SS

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Counting Inventory Stock"

Label Extract File Record Definitions

The label extract file record definitions define the format for each label extract file. The label extract file is the output that the PeopleSoft application sends to the label printing software that you use to print the bar-coded labels.

The label extract files contain many field values that you can use in your label print process.

The label extract files are in comma-delimited format.

Each label extract file that contains an item ID also includes control flags that identify characteristics of that item. The control flags can be concatenated to various key fields that are printed as bar codes. For example, suppose that you concatenate the control flags to the item ID on the item storage labels, your electronic data collection system knows what other keys for which to prompt.

Here are the five control flags:

Lot Control Flag Set to *Y* if the item is lot-controlled. Set to *N* if the item is not lot-controlled.

Serial Control Flag Set to *Y* if the item is serial-controlled. Set to *N* if the item is not serial-controlled.

Staged Date Control Flag Set to *Y* if the item is staged-date controlled. Set to *N* if the item is not staged-date controlled.

Actual Cost Control Flag Set to *Y* if the item is actual-costed. Set to *N* if the item is not actual-costed.

Shipping Serial Control Flag Set to *Y* if the item is shipping serial-controlled. Set to *N* if the item is not shipping serial-controlled. The shipping serial control flag is only included on the shipping carton and shipping container transactions.

Note. The Format ID is an optional field on all of the label extract file records. It is in the first position only if the Include Format check box is selected for the specified format ID.

See Also

Chapter 3, "Implementing Integrations," Setting Up Electronic Data Collections Defaults, page 90

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Item Usage Label

The label extract file record definitions define the format for the label extract file.

Storage Location Label Field Name	Format
Label Format ID	Char 30
Business Unit	Char 10
Location Code/Par Location Code	Char 15
Location Description/Par Location Description	Char 30
Item ID	Char 40
Item Description	Char 30
Quantity	Nbr 11.4
Unit of Measure	Char 3
Standard Unit of Measure	Char 3

Item Storage Label

The label extract file record definitions define the format for the label extract file.

Item Storage Label Field Name	Format	Desc./Com.
Label Format ID	Char 30	N/A
Business Unit	Char 10	N/A
Item ID	Char 40	N/A
Item Description	Char 30	N/A
Lot Control Flag	Char 1	N/A
Lot ID	Char 15	N/A

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Item Storage Label Field Name	Format	Desc./Com.
Serial Control Flag	Char 1	N/A
Serial ID	Char 35	N/A
Staged Date Flag	Char 1	N/A
Staged Date	Date 10	N/A
Actual Cost Flag	Char 1	This field is set to *Y* if the item is actual-costed.
Unit of Measure	Char 3	N/A
Quantity	Nbr 11.4	N/A
Standard Unit of Measure	Char 3	N/A
Standard Quantity	Nbr 11.4	N/A
Reference Number	Char 30	N/A

Storage Container Label

The label extract file record definitions define the format for the label extract file.

Storage Container Label Field Name	Format
Label Format ID	Char 30
Container Number	Nbr 18

Storage Location Label

The label extract file record definitions define the format for the label extract file.

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Storage Location Label Field Name	Format
Label Format ID	Char 30
Business Unit	Char 10
Storage Location	Char 5
Storage Level 1	Char 4
Storage Level 2	Char 4
Storage Level 3	Char 4
Storage Level 4	Char 4

Shipping Carton Label

The label extract file record definitions define the format for the label extract file.

Shipping Carton Label Field Name	Format	Desc./Com.
Label Format ID	Char 30	N/A
Ship From Location	Char 30	N/A
Ship From Address1	Char 55	N/A
Ship From Address2	Char 55	N/A
Ship From Address3	Char 55	N/A
Ship From Address4	Char 55	N/A
Ship From Num1	Char 6	N/A
Ship From Num2	Char 4	N/A
Ship From House Type	Char 2	N/A

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Shipping Carton Label Field Name	Format	Desc./Com.
Ship From City	Char 30	N/A
Ship From Country	Char 30	N/A
Ship From Addr field1	Char 2	N/A
Ship From Addr field2	Char 4	N/A
Ship From Addr field3	Char 4	N/A
Ship From Geo Code	Char 11	N/A
Ship From In City Limit	Char 1	N/A
Ship From State	Char 4	N/A
Ship From Postal	Char 12	N/A
Ship From Country	Char 3	N/A
Customer Name	Char 40	N/A
Customer Name1	Char 40	N/A
Customer Name2	Char 40	N/A
Address1	Char 55	N/A
Address2	Char 55	N/A
Address3	Char 55	N/A
Address4	Char 55	N/A
Num1	Char 6	N/A
Num2	Char 4	N/A

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Shipping Carton Label Field Name	Format	Desc./Com.
House Type	Char 2	N/A
City	Char 30	N/A
County	Char 30	N/A
State	Char 4	N/A
Postal	Char 12	N/A
Country	Char 3	N/A
Addr field1	Char 2	N/A
Addr field2	Char 4	N/A
Addr field3	Char 4	N/A
Geo Code	Char 11	N/A
In City Limit	Char 1	N/A
Carrier	Char 30	N/A
Ship To Customer ID/or Location	Char 15	This field contains either the ship to customer ID or the location, depending on the field that you used when you created the order.
Route Code	Char 6	N/A
Route Stop Number	Number 5	N/A
Customer PO	Char 25	N/A
Customer PO Line	Char 11	N/A
Customer Contract Number	Char 25	N/A

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Shipping Carton Label Field Name	Format	Desc./Com.
Customer Contract Line Number	Char 3	N/A
Customer Item Number	Char 40	N/A
Business Unit	Char 10	N/A
Demand Source	Char 2	N/A
Source Business Unit	Char 5	N/A
Order Number	Char 10	N/A
Order Line Number	Nbr 5	N/A
Schedule Line Number	Nbr 7	N/A
Inventory Item ID	Char 40	N/A
Demand Line Number	Nbr 4	N/A
Product ID	Char 40	N/A
Parent Product ID	Char 40	N/A
Lot Control Flag	Char 1	N/A
Standard Serial Control Flag	Char 1	N/A
Staged Date Control Flag	Char 1	N/A
Actual Cost Flag	Char 1	This field is set to *Y* if the item is actual-costed.
Ship Serial Control Flag	Char 1	N/A
Pick Batch ID	Nbr 10	N/A
Pick Batch Line Number	Nbr 5	N/A

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Shipping Carton Label Field Name	Format	Desc./Com.
Carton Qty in Ordering UOM	Nbr 11.4	N/A
Ordering UOM	Char 3	N/A
Carton Qty in Standard UOM	Nbr 11.4	N/A
Standard UOM	Char 3	N/A
Carton Qty in Standard Pack UOM	Nbr 11.4	N/A
Standard Pack UOM	Char 3	N/A
Carton Sequence	Char 10	N/A

Shipping Container Label

The label extract file record definitions define the format for the label extract file.

Shipping Container Label Field Name	Format	Desc./Com.
Label Format ID	Char 30	N/A
Ship From Location	Char 30	N/A
Ship From Address1	Char 55	N/A
Ship From Address2	Char 55	N/A
Ship From Address3	Char 55	N/A
Ship From Address4	Char 55	N/A
Ship From Num1	Char 6	N/A
Ship From Num2	Char 4	N/A
Ship From House Type	Char 2	N/A

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Shipping Container Label Field Name	Format	Desc./Com.
Ship From City	Char 30	N/A
Ship From County	Char 30	N/A
Ship From State	Char 4	N/A
Ship From Postal	Char 12	N/A
Ship From Country	Char 3	N/A
Ship From Addr field1	Char 2	N/A
Ship From Addr field2	Char 4	N/A
Ship From Addr field3	Char 4	N/A
Ship From Geo Code	Char 11	N/A
Ship From In City Limit	Char 1	N/A
Customer Name	Char 40	N/A
Customer Name1	Char 40	N/A
Customer Name2	Char 40	N/A
Address1	Char 55	N/A
Address2	Char 55	N/A
Address3	Char 55	N/A
Address4	Char 55	N/A
Num1	Char 6	N/A
Num2	Char 4	N/A

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Shipping Container Label Field Name	Format	Desc./Com.
House Type	Char 2	N/A
City	Char 30	N/A
County	Char 30	N/A
State	Char 4	N/A
Postal	Char 12	N/A
Country	Char 3	N/A
Carrier	Char 30	N/A
Ship To Customer ID or Location	Char 15	This field contains either the ship to customer ID or the location, depending on the field that you used when you created the order.
Manufacturer ID Number	Char 7	N/A
Shipping Container Serial Number	Nbr 9	N/A
Carton Sequence	Char 10	N/A
Business Unit	Char 10	N/A

Shipping Serial Number Label

The label extract file record definitions define the format for the label extract file.

Serial Number Label Field Name	Format
Label Format ID	Char 30
Serial ID	Nbr 35

Production Completion Label

The label extract file record definitions define the format for the label extract file.

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Production Completion Label Field Name	Format	Desc./Com.
Label Format ID	Char 30	N/A
Business Unit	Char 10	See note.
Production ID	Char 10	N/A
Production Area	Char 10	N/A
Item ID	Char 40	See note.
Item Description 30	Char 30	N/A
Configuration Code	Char 50	N/A
Revision	Char 4	N/A
Production Type	Char 2	N/A
Lot Control Flag	Char 1	N/A
Serial Control Flag	Char 1	N/A
Staged Date Flag	Char 1	N/A
Actual Cost Flag	Char 1	N/A
Lot ID	Char 15	N/A
Standard Unit of Measure	Char 3	N/A
Standard Pack Quantity	Nbr 11.4	N/A
Std Pack Unit of Measure	Char 3	N/A
Quantity in Std Pack UOM	Nbr 11.4	N/A
Date	Date	CCYYMMDD

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Production Completion Label Field Name	Format	Desc./Com.
Op Sequence	Number 4.0	N/A
Output Type	Char 2	N/A

Note. Certain fields allow for possible larger sizes to accommodate customer revisions. In general, field sizes should match that within the PeopleSoft COBOL programs. Online pages use the sizes as defined within PeopleSoft Application Designer. A size mismatch between the file and the definition may result in an error when data is retrieved through the flat file.

Purchasing Receipt Label

The label extract file record definitions define the format for the label extract file.

Receiving Label Field Name	Format
Label Format ID	Char 30
Inventory Business Unit	Char 10
Item ID	Char 40
Item Description	Char 30
Lot Control Flag	Char 1
Lot ID	Char 15
Serial Control Flag	Char 1
Serial ID	Char 35
Receipt Date	Date 10
Actual Cost Flag	Char 1
Receiving Business Unit	Char 5
Receiver ID	Char 10

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Receiving Label Field Name	Format
Receiver Line Number	Nbr 5
Unit of Measure	Char 3
Quantity	Nbr 11.4
Standard Unit of Measure	Char 3
Standard Quantity	Nbr 11.4
Production ID	Char 10
Production Sequence Number	Nbr 2
Staged Date Flag	Char 1

Kanban Card and Pull Ticket Label

The label extract file record definitions define the format for the label extract file.

Kanban Field Name	Type
Label Format ID	Char 30
Business Unit	Char 10
Report Type • 2 = Pull Ticket • 3 = Kanban Card	Char 1
Replenishment Source • 1 = Inventory • 2 = Vendor • 3 = Feeder Line	Char 1
Kanban ID	Char 15
Item ID	Char 40

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Kanban Field Name	Type
Item Description	Char 30
WIP Storage Area	Char 5
WIP StorageLevel 1	Char 4
WIP StorageLevel 2	Char 4
WIP StorageLevel 3	Char 4
WIP StorageLevel 4	Char 4
Source Storage Area Blank if Replenishment Source <> INV	Char 5
Source StorageLevel 1 Blank if Repl Source <> INV	Char 4
Source StorageLevel 2 Blank if Repl Source <> INV	Char 4
Source StorageLevel 3 Blank if Repl Source <> INV	Char 4
Source StorageLevel 4 Blank if Repl Source <> INV	Char 4
Production Area Blank if Repl Source <> Feeder	Char 10
Vendor ID Blank if Repl Source <> Vendor	Char 10
Vendor Name Blank if Repl Source <> Vendor	Char 40

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Kanban Field Name	Type
Vendor Location Blank if Repl Source <> Vendor	Char 10
Vendor Location Descr Blank if Repl Source <> Vendor	Char 30
Vendor Item ID Blank if Repl Source <> Vendor	Char 20
Vendor Qty Blank if Repl Source <> Vendor	Number 11.4
Vendor UOM Blank if Repl Source <> Vendor	Char 3
Qty Standard UOM	Number 11.4
Standard UOM	Char 3
Lot Control Flag	Char 1
Serial Control Flag	Char 1
Print Count	Number 3
DateTime Stamp	Datetime 14

Picking Plan Extract File Record Definitions

The system generates this optional extract file at the same time that it initiates the picking plan. Its content mimics the data contained within the printed picking plan document and provides an electronic means for the front-end (hand-held or batch) process to validate and enhance data collection. Data in the file is comma-separated.

The picking plan extract file includes five control flags that identify characteristics of the item or component being picked:

Lot Control Flag Set to *Y* if the item is lot-controlled. Set to *N* if the item is not lot-controlled.

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Serial Control Flag Set to *Y* if the item is serial-controlled. Set to *N* if the item is not serial-controlled.

Staged Date Control Flag Set to *Y* if the item is staged-date controlled. Set to *N* if the item is not staged-date controlled.

Actual Cost Control Flag Set to *Y* if the item is actual-costed. Set to *N* if the item is not actual-costed.

Shipping Serial Control Flag Set to *Y* if the item is shipping serial-controlled. Set to *N* if the item is not shipping serial-controlled. The shipping serial control flag is only included in the Inventory picking extract file.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Picking Inventory," Using the Order Release Request Run Control

Inventory Picking Extract File Format

The system generates the inventory picking extract file at the same time that it initiates the pick plan.

Picking Plan Extract File Field Name	Format
Business Unit*	Char 10
Extract Source Flag*	Char 1
Pick Batch ID	Nbr 10
Pick List Line Number	Nbr 5
Sequence Number	Nbr 2
Pick Mode Flag*	Char 1
Customer ID	Char 15
Ship To Customer ID	Char 15
Location	Char 10
Demand Source	Char 2
Source Business Unit	Char 5
Order Number	Char 10

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Picking Plan Extract File Field Name	Format
Order Int Line Number	Nbr 5
Schedule Line Number	Nbr 4.2
Parent Product ID	Char 18
Item ID*	Char 40
Item Description 30	Char 30
Item Configuration Code	Char 50
Container ID	Char 10
Storage Area	Char 5
Storage Level 1	Char 4
Storage Level 2	Char 4
Storage Level 3	Char 4
Storage Level 4	Char 4
Order/Pick Quantity in Standard UOM	Nbr 11.4
Order/Pick Quantity in Order/Pick UOM	Nbr 11.4
Reserved Quantity in Standard UOM	Nbr 11.4
Reserved Quantity in Location UOM	Nbr 11.4
Available Quantity in Standard UOM	Nbr 11.4
Available Quantity in Location UOM	Nbr 11.4
Standard UOM	Char 3

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Picking Plan Extract File Field Name	Format
Order/Pick UOM	Char 3
Location UOM	Char 3
Order UOM Conversion Rate	Nbr 7.8
Location UOM Conversion Rate	Nbr 7.8
Lot ID	Char 15
Serial ID	Char 35
Staged Date*	Char 8
Lot Control Flag	Char 1
Serial Control Flag	Char 1
Staged Date Control Flag	Char 1
Ship Serial Control Flag	Char 1
Hard Allocation Flag	Char 1
Partial Quantity Flag	Char 1
Hard Allocation Flag	Char 1
Partial Quantity Flag	Char 1
Substitute Flag	Char 1
Qty Precision for Std UOM	Char 1
Rounding Rule for Std UOM	Char 1
Qty Precision for Loc UOM	Char 1

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Picking Plan Extract File Field Name	Format
Rounding Rule for Loc UOM	Char 1
Allow Overpick Flag	Char 1
Maximum Picking Tolerance	Nbr 3.2
Load ID	Char 10
Carrier ID	Char 10
Ship Via	Char 10
Route Code	Char 6
Route Stop Number	Nbr 5
Lot Availability Date CCYYMMDD	Char 8
Lot Retest Date CCYYMMDD	Char 8
Lot Expiration Date CCYYMMDD	Char 8
Scheduled Ship Date CCYYMMDD	Char 8
ASRS ID	Nbr 15
Picking Zone	Char 6
Original Item ID	Char 40
Original or Reprint Flag *	Char 1
Date / Time Stamp*	Char 14

Field-Specific Notes

See the field-specific information that follows.

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Business Unit

The Business Unit field permits possible larger sizes to accommodate customer revisions. In general, field sizes should match that within the PeopleSoft COBOL programs. Online pages use the sizes as defined within PeopleSoft Application Designer.

Extract Source Flag

0 = Inventory Pick Plan

1 = Manufacturing Pick Plan

Pick Mode Flag

0 = Push

1 = Pull

Item ID

The Item ID field permits possible larger sizes to accommodate customer revisions. In general, field sizes should match that within the PeopleSoft COBOL programs. Online pages use the sizes defined within PeopleSoft Data Designer.

Staged Date

The format is CCYYMMDD.

Original or Reprint Flag

0 = Original

1 = Reprint

Date / Time Stamp

The format is CCYYMMDDHHMMSS.

Manufacturing Picking Extract File Format

The system generates the manufacturing extract file at the same time that the system initiates the pick plan.

Note. For manufacturing extract data, the control flags reflect the requirements for the component ID, not the item ID.

Picking Plan Extract File Field Name	Format
Business Unit*	Char 10
Extract Source Flag*	Char 1
Pick Batch ID	Nbr 10
Pick List Line Number	Nbr 5

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Picking Plan Extract File Field Name	Format
Sequence Number	Nbr 2
Pick Mode Flag*	Char 1
Production Area	Char 10
Production ID	Char 10
Production Type*	Char 2
Issue Method*	Char 4
Item ID*	Char 40
Item Description 30	Char 30
Item Configuration Code	Char 50
Original Component ID	Char 40
Component ID	Char 40
Component Description 30	Char 30
Component Configuration Code	Char 50
Operation Sequence	Nbr 4
Quantity Code*	Char 3
Required Date*	Char 8
Required Time*	Char 6
Work Center Code	Char 10
Work Center Description	Char 30

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Picking Plan Extract File Field Name	Format
To Container ID	Char 10
To Storage Area	Char 5
To Storage Level 1	Char 4
To Storage Level 2	Char 4
To Storage Level 3	Char 4
To Storage Level 4	Char 4
Container ID	Char 10
Storage Area	Char 5
Storage Level 1	Char 4
Storage Level 2	Char 4
Storage Level 3	Char 4
Storage Level 4	Char 4
ASRS ID	Nbr 15
Order/Pick Quantity in Standard UOM	Nbr 11.4
Order/Pick Quantity in Order/Pick UOM	Nbr 11.4
Reserved Quantity in Standard UOM	Nbr 11.4
Reserved Quantity in Location UOM	Nbr 11.4
Available Quantity in Standard UOM	Nbr 11.4
Available Quantity in Location UOM	Nbr 11.4

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Picking Plan Extract File Field Name	Format
Standard UOM	Char 3
Order/Pick UOM	Char 3
Location UOM	Char 3
Order/Pick UOM Conversion Rate	Nbr 7.8
Location UOM Conversion Rate	Nbr 7.8
Lot ID	Char 15
Lot Expiration Date	Char 8
Lot Availability Date	Char 8
Serial ID	Char 35
Lot Control Flag	Char 1
Serial Control Flag	Char 1
Staged Date Control Flag	Char 1
Actual Cost Control Flag	Char 1
Maintain Production ID Flag	Char 1
Non Own Flag	Char 1
Original or Reprint Flag*	Char 1
Substitute Flag	Char 1
Date / Time Stamp*	Char 14

Field-Specific Notes

See the field-specific-information that follows.

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Business Unit

The Business Unit field permits possible larger sizes to accommodate customer revisions. In general, field sizes should match that within the PeopleSoft COBOL programs. Online pages use the sizes defined within PeopleSoft Data Designer.

Extract Source Flag

0 = Inventory Pick Plan

1 = Manufacturing Pick Plan

Pick Mode Flag

0 = Push

1 = Pull

Production Type

PR = Production

RW = Rework

TD = Teardown

Issue Method

ISS = Issue

REPL = Replenish

KIT = Kit

Item ID

This field permits possible larger sizes to accommodate customer revisions. In general, field sizes should match that within the PeopleSoft COBOL programs. Online pages use the sizes defined within PeopleSoft Data Designer.

Quantity Code

ORD = per Order

ASY = per Assembly

Required Date

The format is CCYYMMDD.

Required Time

The format is HHMMSS.

Original or Reprint Flag

A reprinted extract reflects the current data values in the database. If any pick transactions have been applied between the original and reprinted extract, the data content may differ.

0 = Original

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1 = Reprint

Date / Time Stamp

The format is CCYYMMDDHHMMSS.

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PART 6

Integrating with Transportation Management Systems

Chapter 12
Integrating with Transportation Management Systems

CHAPTER 12

Integrating with Transportation Management Systems

This chapter provides an overview of transportation management system (TMS) enterprise integration points (EIP's) and discusses:

- Setting up PeopleSoft system for TMS integration.
- Publishing the TMS order release EIP.
- Understanding TMS processing.
- Publishing the load notification EIP.

Understanding the Transportation Management System Integration with PeopleSoft Inventory

A TMS is used to optimize the grouping of orders into shipments for distribution out of a warehouse. Order information is sent to the TMS and load optimization is performed on the orders to be shipped. The TMS determines the load ID for each of the demand lines. The demand lines are returned to the PeopleSoft fulfillment tables with a load ID.

To support implementations in which a third-party system is used to allow shippers and carriers to maximize space utilization of existing loads, and thereby minimizing shipping costs, PeopleSoft provides two EIPs. These EIPs consist of:

- TMS Order Release—an asynchronous outbound service operation within PeopleSoft Integration Broker that releases orders to a TMS.
- TMS Load Notification—a synchronous service operation (TMS_LOAD_NOTIFICATION_REQ) and an asynchronous inbound service operation (TMS_LOAD_NOTIFICATION) that can load TMS notifications in PeopleSoft Inventory.

This diagram shows the process flow of the integration between PeopleSoft Inventory's demand fulfillment cycle and a third-party TMS system:

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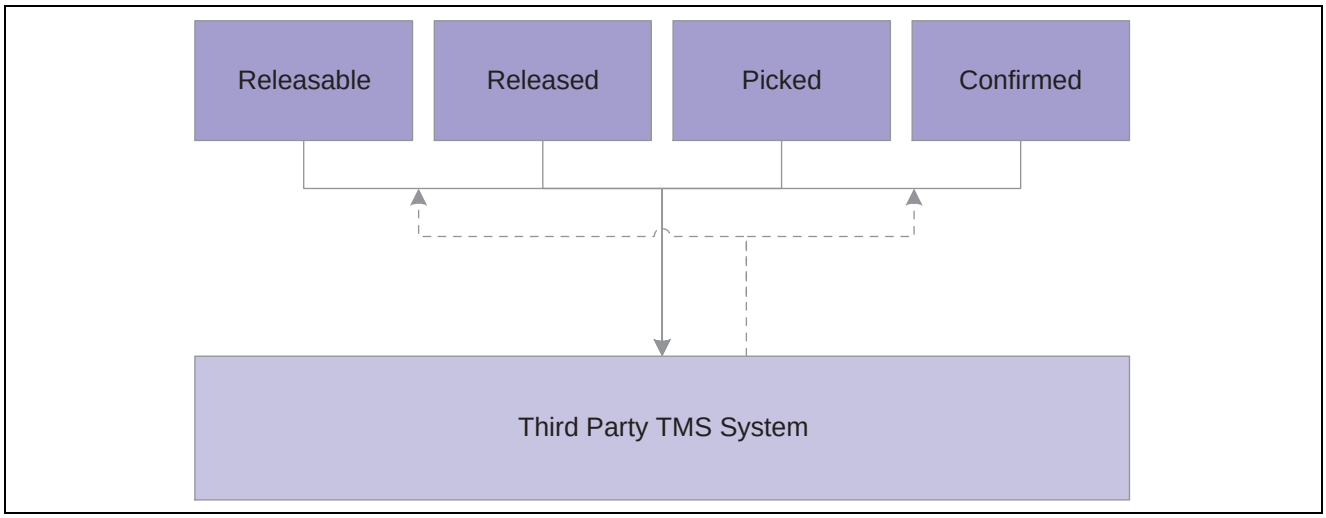

PeopleSoft Inventory to TMS process

Shipment Definition

As it relates to PeopleSoft Inventory and TMS, a shipment is a unit of work that can be thought of as the product to be delivered to a customer, at a specific location, on a specific date, by a specific method of delivery. At most, it is represented by an order in the PeopleSoft system.

Within the order, many factors would determine whether the order is comprised of more than one shipment. For example, the difference in primary fields such as: multiple delivery locations and schedule dates, or specifying different carriers for different demand lines are values that would cause the order to be treated as multiple shipments.

For purposes of load creation in the TMS, outbound information must be organized into logical shipments. A shipment is the distinct combination of these fields:

- BUSINESS_UNIT
- DEMAND_SOURCE
- SOURCE_BUS_UNIT
- ORDER_NO
- SHIP_TO_CUST_ID
- ADDRESS SEQ NUM
- LOCATION
- COUNTRY
- POSTAL
- STATE
- COUNTY
- CITY
- HOUSE_TYPE
- NUM1
- NUM2
- ADDRESS1

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- ADDRESS2
- ADDRESS3
- ADDRESS4
- ADDR_FIELD1
- ADDR_FIELD2
- ADDR_FIELD3
- SHIP_CUST_NAME1
- SHIP_CUST_NAME2
- SCHED_DATE / TIME
- SHIP_EARLY_DATE / TIME
- SHIP_LATE_DATE / TIME
- SCHED_ARRV_DTTM
- LOAD_ID
- CARRIER_ID
- SHIP_TYPE_ID
- FREIGHT TERMS

Synchronize Customer and Location Information

In addition to sending order release information to the TMS, you can synchronize customer and location information by using the PeopleSoft Order Management Customer EIPs (service operations starting with CUSTOMER) and the PeopleSoft Inventory Location EIPs (service operations starting with LOCATION).

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Understanding Order Fulfillment Processing," EIPs for Fulfillment Transactions

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Setting Up Fulfillment at the Business Unit and Item Levels," Defining Transportation Management System (TMS) Interface Options

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Setting Up Freight Carriers

Setting Up PeopleSoft for TMS Integration

This section discusses how to set up PeopleSoft for TMS integration.

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Pages Used to Set Up PeopleSoft for TMS Integration

Page Name	Object Name	Navigation	Usage
Carrier	CARRIER_TBL	Set Up Financials/Supply Chain, Common Definitions, Shipping and Receiving, Carrier Table	Indicate if order lines that have a specific carrier should or should not be downloaded to the TMS system.
Auto Numbering	AUTO_NUM_PNL	Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering	To set up the TMS Reference ID numbering scheme, use the Auto Numbering component.
Setup Fulfillment-Transportation Interface page	OF_SETUP_INV	Inventory, Fulfill Stock Orders, Fulfillment Rules, Setup Fulfillment, Transportation Interface	Determine the structure of the TMS data sent to and received by the TMS.

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Setting Up Freight Carriers

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Setting Up Automatic Numbering

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Setting Up Fulfillment at the Business Unit and Item Levels," Defining Transportation Management System (TMS) Interface Options

Setting up the TMS Integration

Before you can perform the PeopleSoft Inventory to TMS integration, you must:

- Activate the TMS_ORDER_RELEASE, TMS_LOAD_NOTIFICATION, or TMS_LOAD_NOTIFICATION_REQ service operations within PeopleSoft Integration Broker.

  See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Understanding Order Fulfillment Processing," Transportation Management System EIPs.
- Activate the associated batch publish rule for the TMS Order Release service operation.
- Set up the carrier table for carriers that should not be sent to the TMS.
- Set up auto numbering for the TMS Reference ID.
- Set up transportation interface options on the Setup Fulfillment page.

Some setup considerations are:

- The lead time needed to send data to the TMS, process data on the TMS, and sending data back to PeopleSoft Inventory.
- Your typical volume of change orders:
  - If you don't have a lot of change orders, you can download demand lines from PeopleSoft to the TMS sooner in the demand fulfillment process. You do not have to create, resend, remove, or cancel transactions from change orders.

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- If you do have a lot of change orders, you may want to download demand lines from PeopleSoft to the TMS later in the demand fulfillment process. This way you can avoid having to create resend, remove, or cancel transactions from changed orders.

- Handling orders that have a carrier assigned prior to downloading to the TMS. As PeopleSoft Order Management allows you to define carrier defaults at a customer and order level, the demand line may have a carrier assigned prior to downloading to the TMS. If you want the TMS to determine the carrier, you will have to decide whether the TMS will ignore the carrier default and assign a new one, or use the carrier default assigned by PeopleSoft applications.

  Note. If the TMS is to ignore the carrier, or any other field, that is assigned by PeopleSoft, you must determine this on the TMS or modify the TMS_ORDER_RELEASE service operation.

- Handling updates to the customer, location, UOM, and item weight and volume tables.

See Also

PeopleSoft Enterprise Components for FSCM 9.0 PeopleBook, "Activating Integration Points"

Chapter 3, "Implementing Integrations," Setting Up Service Operations, page 83

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

Publishing the TMS Order Release EIP

This section provides an overview of the TMS order release process and discusses how to:

- Send TMS data from PeopleSoft Inventory to the TMS.
- Communicate order changes to the TMS.

Understanding the TMS Order Release Process

Demand lines are eligible for the initial download to the TMS:

- If they are in a releasable state, but not shipped.
- If they do not have a TMS External Reference ID assigned to them.
- If they do not have a route number assigned to them.

Demand lines on the PeopleSoft system are pulled from IN_DEMAND. During this process, the table is updated with the TMS External Reference ID and the TMS Reference Line Number, and the TMS process flag is set to "Y." The TMS process flag indicates that the line has been sent to the TMS and is waiting for the load assignment. The TMS External Reference ID is used as the reference number between the PeopleSoft system and the TMS system.

Demand lines are grouped into logical shipments and the TMS utilizes this information to group shipments into a load:

- The TMS External Reference ID and Line Number.
- Demand line information that is related to the order.
- The customer or destination location address.

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- Any note or comment information on the order header or line.

New rows of data are added to the TMS system.

Note. The addition of new demand lines to an order, with rows that have already been assigned a TMS External Reference ID and transmitted to the TMS, must be handled as an initial download transaction. If an initial download is initiated, the new line will be selected as a line not having a TMS External Reference ID, and will be assigned a TMS External Reference ID and a TMS Reference Line Number. In other words, if a line is added to an order that has been sent to the TMS, a resend transaction will not add the line to the existing TMS External Reference ID. The initial download will send the new line and a new TMS External Reference ID is assigned to it. If you prefer to combine the new line with the orders' TMS External Reference ID, you must remove the original ID and re-initiate an initial download for the order.

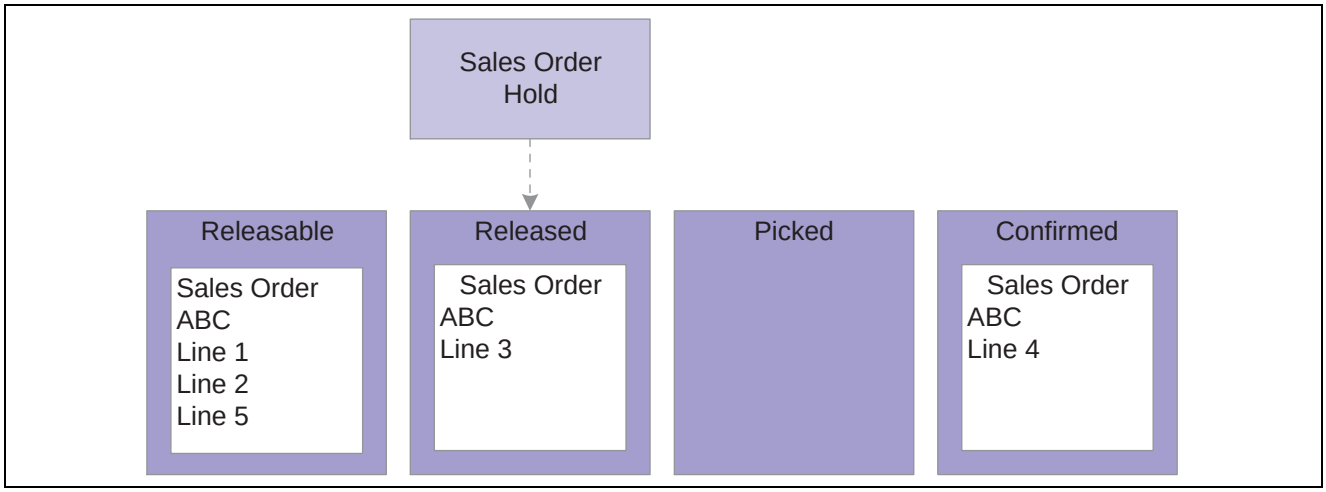
Processing Holds

It is important to understand how the PeopleSoft system processes demand lines that are on hold.

If a demand line is sourced from PeopleSoft Inventory, and the Check for Holds option is selected on the Setup Fulfillment-Transportation Interface page, and it is on hold, then the demand line is not sent to the TMS.

If a demand line is sourced from PeopleSoft Order Management, and the Check for Holds option is selected on the Setup Fulfillment-Transportation Interface page, and the demand line cannot proceed to the next state, then the demand line is not sent to the TMS.

This diagram illustrates an example of a sales order that has lines that are not sent to the TMS:



TMS sales order holds

This diagram shows that a sales order has five lines, and the state of each line. If PeopleSoft Order Management is set up so that each order line is held at a released state, then lines 1, 2, and 5 will not be sent to the TMS. However, lines 3 and 4 will be sent to the TMS because line 3 is already at a released state, and line 4 is past a released state.

See Also

PeopleSoft Enterprise Order Management 9.0 PeopleBook, "Placing Sales Orders on Hold"

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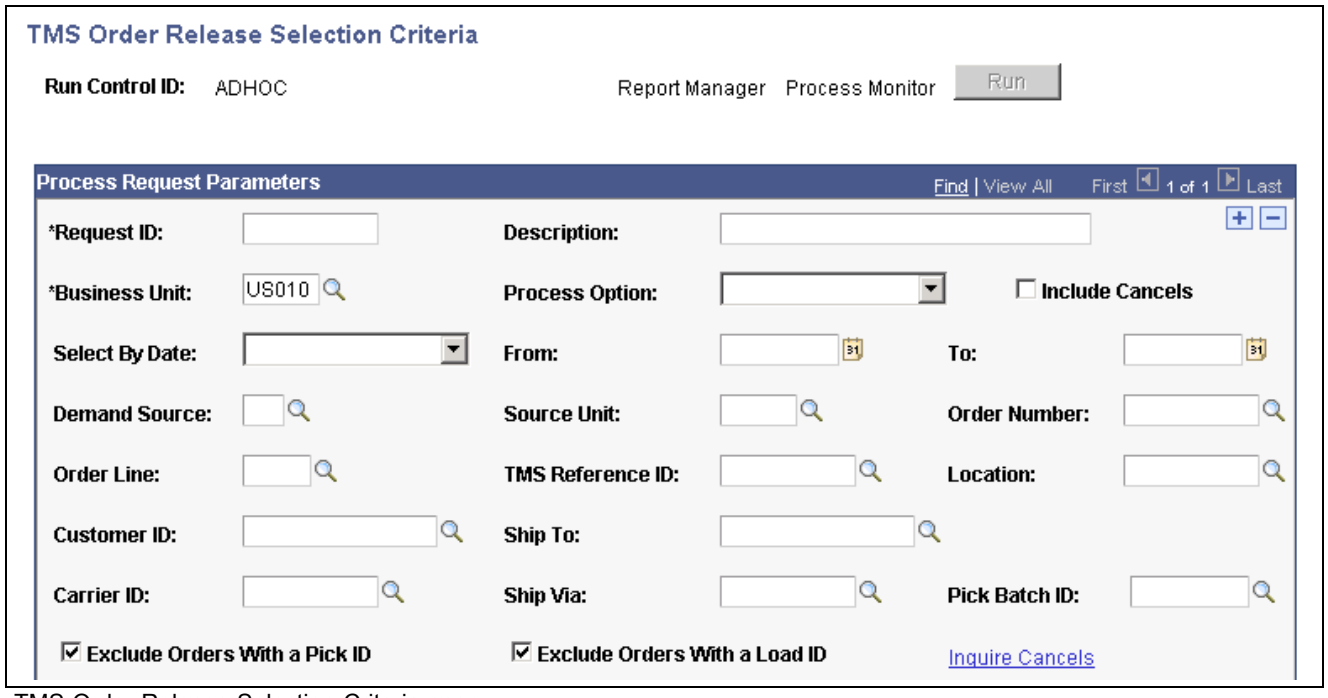
Pages Used to Publish the TMS Order Release EIP

Page Name	Object Name	Navigation	Usage
Publish Outbound Message	IN_RUN_PUB_MSG	SCM Integrations, Publish Outbound Message	Select the TMS Order Release check box to activate the link.
TMS Order Release Selection Criteria	IN_RUN_TMSREL	Select the TMS Order Release check box on the Publish Outbound Message page, and click the TMS Order Release link.	Select which order lines are to be processed for this run control.

Sending TMS Data from PeopleSoft Inventory to the TMS

Use the TMS_ORDER_RELEASE EIP to send demand data from PeopleSoft Inventory to the TMS.

Access the TMS Order Release Selection Criteria page.



TMS Order Release Selection Criteria page

Process Option Select one of these options to run the IN_TMSORDREL application engine process:

Initial Download: Select to send order lines to the TMS for the first time.

Re-send Shipment: Select to send changes to order lines that were previously sent to the TMS.

Remove Shipments: Select to request that all rows of shipment be physically deleted from the TMS system.

Include Cancels Select this option to remove all rows of a shipment from the TMS. This option is used to remove shipments that have an unfulfilled state in PeopleSoft Inventory or Order Management.

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TMS Reference ID	Select a value if you are resending or removing a shipment. This option is used when change orders occur or to identify a specific TMS Reference ID.
Inquire Cancels	Select this link to view all orders that have an unfulfilled stateand will be downloaded to the TMS if you select the Include Cancels option.

Note. The TMS Reference ID is created from auto numbering setup on the PeopleSoft system. This ID is assigned to each order line selected during the Publish Outbound Message process.

Communicating Order Changes to the TMS

This section provides an overview of order changes and discusses:

- Using the resend outbound transaction.
- Using the remove outbound transaction.
- Using the cancel outbound transaction.

Understanding Order Changes

Demand lines can change within PeopleSoft Inventory and Order Management after they have been sent to the TMS.

The change may be to a primary field or to a secondary field.

- Examples of a primary field are:
  - The schedule date.
  - The destination location or address.
  - The carrier.
- Examples of a secondary field are:
  - The unit of measure.
  - The quantity.

If a change is made to a demand line that has been sent to the TMS, it is your responsibility to update the TMS.

There are three options to communicate demand changes to the TMS:

- Use the resend outbound transaction.
- Use the remove outbound transaction.
- Use the cancel outbound transaction.

Using the Resend Outbound Transaction

This option is used if changes are made to secondary fields, or if lines are canceled from an order.

A resend transaction provides the ability to send changes to demand lines that were previously sent to the TMS.

The TMS uses an action of *Add* for this transaction and if the TMS External Reference ID exists on the database, it deletes the associated row and adds the new row.

Using the Remove Outbound Transaction

This option is used if changes are made to primary fields, and can be followed by the initial download-outbound transaction.

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This transaction is created at the business unit and TMS External Reference ID level.

It requests that all rows for a shipment be physically deleted from the TMS system.

The TMS upload flag and the TMS External Reference ID are initialized for the demand lines for which the delete transaction is performed on the PeopleSoft system.

Using the Cancel Outbound Transaction

This option is used if an order has an unfulfilled state in PeopleSoft Inventory or Order Management.

This transaction is created at the business unit and TMS External Reference ID level.

It requests that all rows for a shipment be physically deleted from the TMS system.

Understanding TMS Processing

In general, the TMS system is typically used to determine these values:

- The best carrier to use for the shipment.
- The best delivery method to use for the shipment.
- The ship date and the arrival date.
- The load ID.
- The stop number.

If multiple shipments are combined into a load, the stop number is used to determine the order to load the delivery container so that it may be unloaded efficiently, that is in the stop order.

The primary fields, sent from the PeopleSoft system, for each line of an order determine how many shipments the TMS will create. Within an order, in general, if it's going to the same customer, the same location, on the same date, using the same ship method, PeopleSoft will consider this one shipment. Auto numbering setup will determine the External Reference ID, which is assigned to the shipment during the download process and used for identification purposes.

Shipment data is typically held in the TMS until one of these conditions are met:

- The TMS has enough information to create a full load.
- The delivery vehicle is full.
- The scheduled ship date is approaching.

Receiving the Load Notification EIP

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

- Upload TMS data from the TMS to PeopleSoft Inventory.
- View and correct errors.

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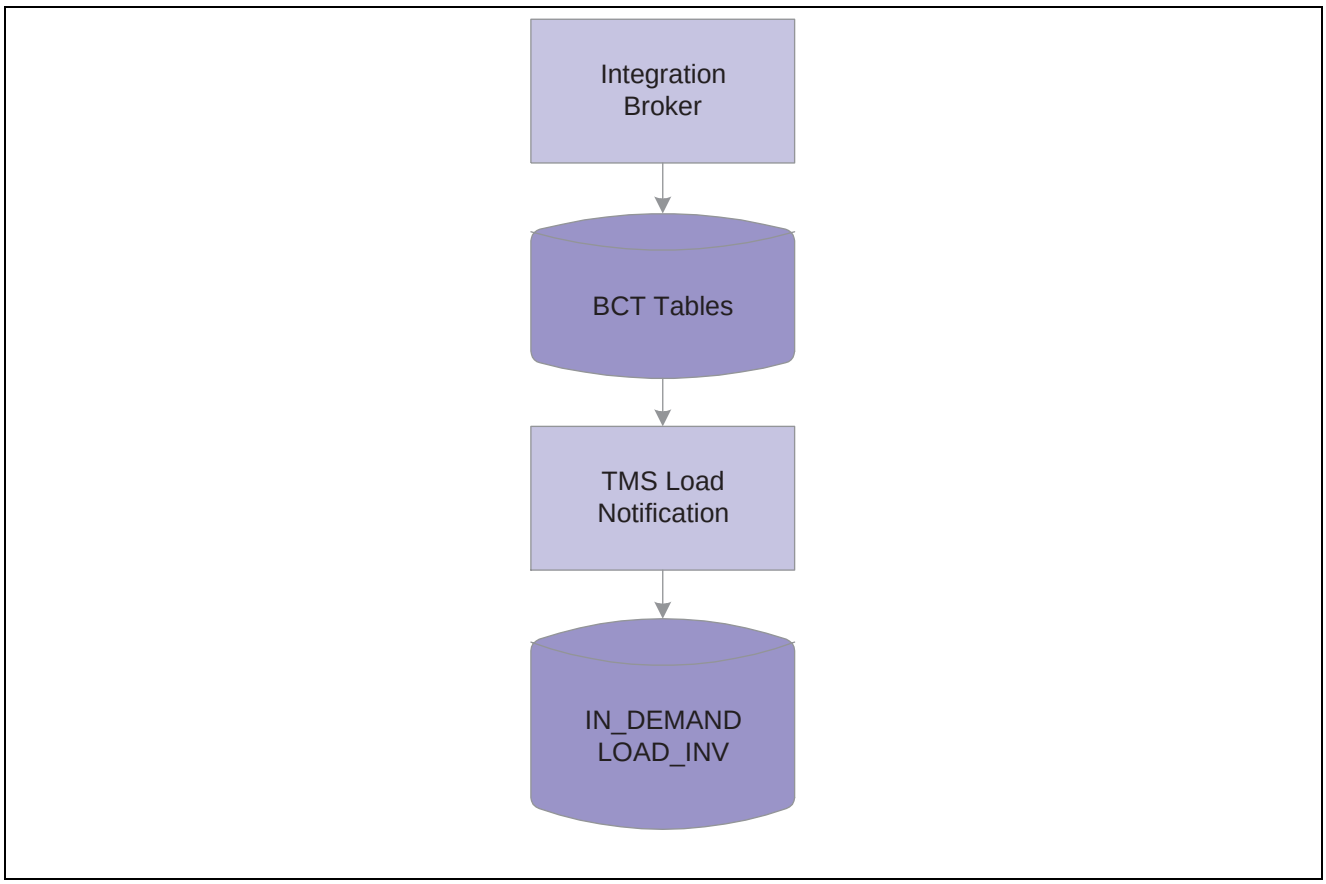
Understanding the Load Notification EIP Process

This diagram shows the process flow of data from the TMS to PeopleSoft Inventory:



TMS upload integration

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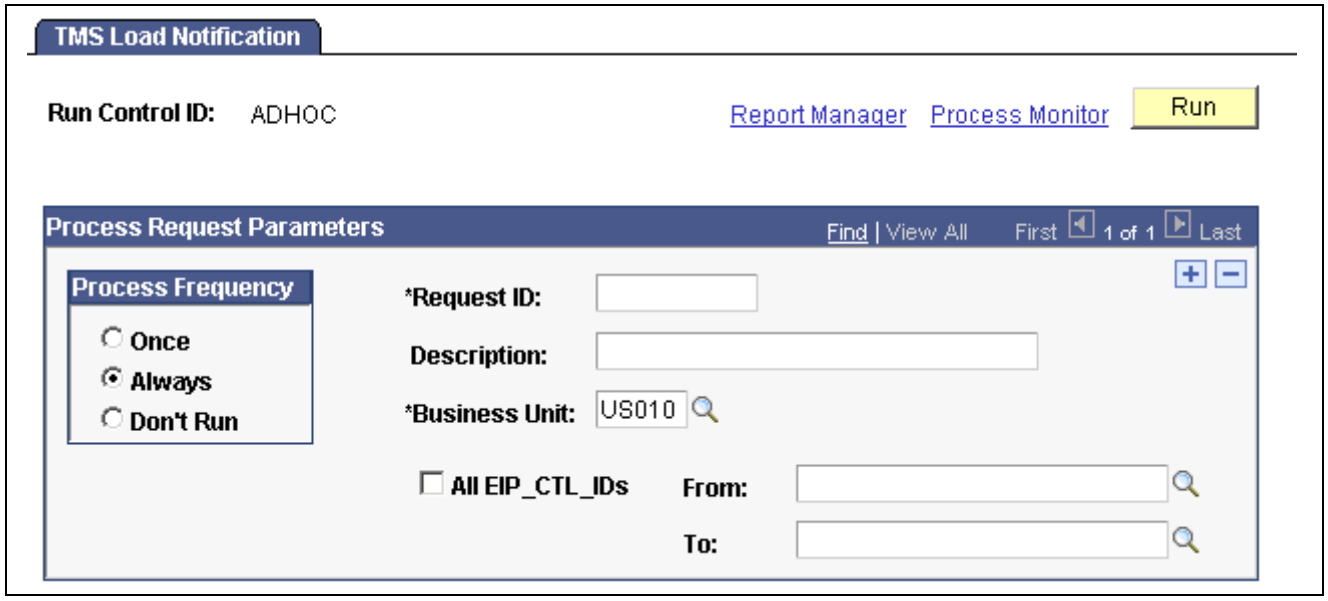
Pages Used to Subscribe to the Load Notification EIP

Page Name	Object Name	Navigation	Usage
TMS Load Notification	BCT_INV_TMSLOAD	SCM Integrations, Process Transactions, Inventory, TMS Load Notification	Launch the IN_TMSUPLOAD Application Engine process, which pulls the TMS transactional data from the BCT tables and updates IN_DEMAND and LOAD_INV.
Transaction Maintenance	BCT_CTL_UPD	SCM Integrations, Transaction Error Handling, Maintain Transactions	View and change the status of error messages found during the TMS Load Notification process.
Transportation Management	BCT_TMS_UPD_INV	Click the EIP Control ID link from the Transaction Maintenance page.	View and correct error messages found during the TMS Load Notification process.

Uploading TMS Data from the TMS to PeopleSoft Inventory

Access the TMS Load Notification page.



TMS Load Notification page

The TMS_ LOAD_NOTIFICATION EIP pulls TMS information from the BCT tables and performs error checking.

Depending on where the order line is within the fulfillment process, this process will find the order line and update these values:

- The load ID.
- The load stop number.

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- The shipping method.
- The carrier.
- The shipment dates.

PeopleSoft load management (LOAD_INV) is updated with the load ID, the carrier, the ship method, and the schedule date from the TMS.

If the TMS changes the scheduled arrival date for an interunit MSR that is supply pegged, and is sourced from PeopleSoft Planning or Inventory, an email message is sent notifying the user of the change.

See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Setting Up and Using the Message Dashboard".

The TMS Process flag is turned off and the shipment may be processed.

The load ID is an optional field during this process. For example, the TMS may determine that the order should be shipped through an outside carrier. If this occurs, the shipment may be returned to PeopleSoft with the carrier and ship via assigned, but without a load ID.

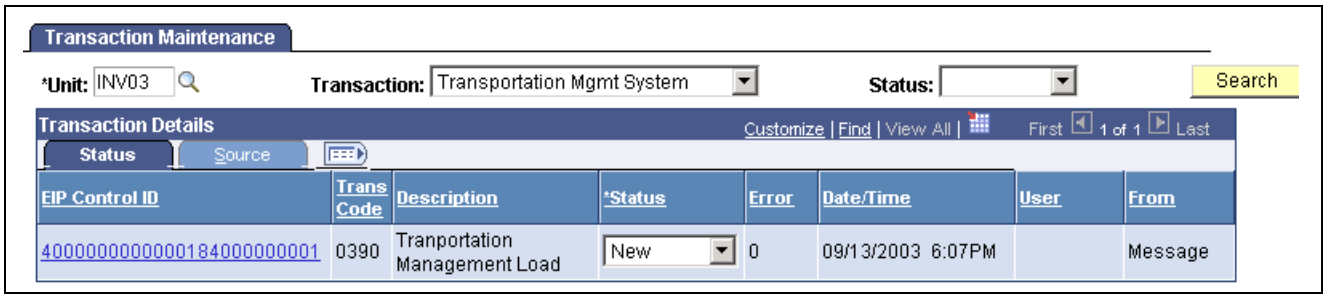
The TMS can send a delete transaction to PeopleSoft, which will remove all of the load information from demand lines and reset the TMS process flag.

All EIP_CTL_IDs Select this option to process all EIP control IDs from the BCT tables. This option will process all of the transactional data that has a status of *New* or *Reprocess*.

From and To Enter the specific EIP Control ID. These fields have search buttons when the All EIP_CTL_IDs option is not selected.

Viewing and Correcting Errors

Access the Transaction Maintenance page.



Transaction Maintenance page

The Transaction Maintenance page reads the BCT tables and is used to view and change the status of error messages that are found during the upload process.

Access the Transportation Management page.

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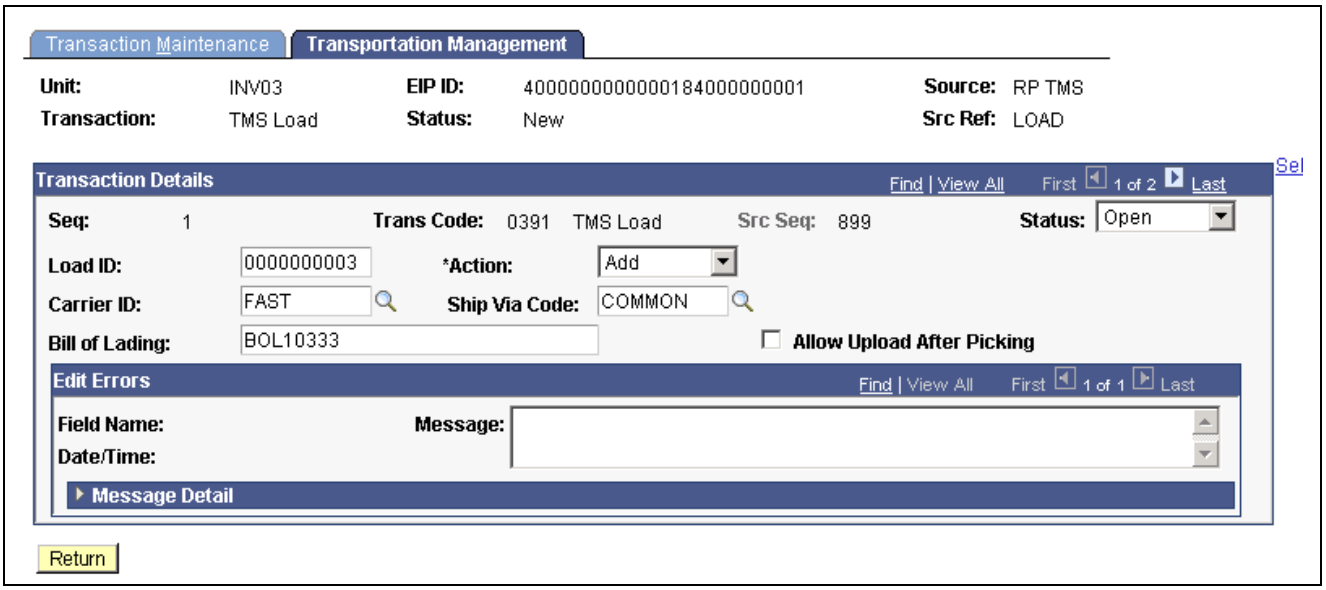

Transportation Management page

The Transportation Management page provides details of the error message. There can be three levels of message rows; one for the load, one for the order, and one for the line. Each row will display different fields depending on the level of the message.

See Also

Chapter 2, "Understanding PeopleSoft Supply Chain Management Enterprise Integration Points," page 9

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PART 7

Integrating with PeopleSoft CRM

Chapter 13
Integrating with PeopleSoft CRM

CHAPTER 13

Integrating with PeopleSoft CRM

This section provides an overview and discusses integrating PeopleSoft SCM applications with PeopleSoft CRM.

Understanding PeopleSoft SCM Integration with PeopleSoft CRM

You use EIPs to seamlessly integrate your (SCM) applications to PeopleSoft (CRM). While you can use these EIPs to integrate with other technologies, your setup steps can be different if you are integrating to PeopleSoft CRM.

Setting Up CRM EIPs

In general, you need to follow a few more steps used to set up EIPs to integrate with PeopleSoft CRM. These steps are unique to each EIP, and thus are found in the PeopleSoft SCM application documentation for each individual EIP. However, some EIPs use different service operations to integrate with PeopleSoft CRM than to other systems. For example, Item Master uses the ITEM_CRM_SYNC_EFF service operation to integrate with PeopleSoft CRM, and ITEM_SYNC or ITEM_SYNC_EFF to integrate with other applications such as a Warehouse Management System.

Processing Inbound CRM EIPs

In general, you follow a few different steps when subscribing to CRM EIPs.

You load inbound XML-based transactions into the PeopleSoft system using subscription processes that are automatically initiated by PeopleSoft's Integration Broker functionality. Once loaded, the system validates the information and if no errors are found, updates the appropriate PeopleSoft application tables. If errors are found, then the data may be corrected and resubmitted for processing.

Processing Outbound CRM EIPs

You can publish outbound XML-based service operations from different points in the system using PeopleSoft's messaging capabilities. If you are publishing an entire table such as items or customers, you use the one time full data publish utility. If you are publishing incremental update service operations, the system automatically publishes service operations with the data when you save the appropriate component.

Common Object Integrations

This section discusses integration of common objects

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Syncing Customers, Contacts, and Products

You synchronize products, customers, and contacts by performing a full table publish to the PeopleSoft Order Capture system. PeopleSoft SCM provides updates to the subscribing system with incremental service operations. Products should be maintained in PeopleSoft SCM and published to PeopleSoft CRM. Customers and Contacts may be maintained in both PeopleSoft SCM and CRM.

PeopleSoft Order Management Integration with PeopleSoft Order Capture

PeopleSoft Order Management and PeopleSoft Order Capture sync customer, contact, and product information. They also sync sales order data.

Submitting Quotes

PeopleSoft Order Capture submits a quote (CRM_QUOTE), which is transformed into a subscribe service operation (SALES_CRM_QUOTE_LOAD) to PeopleSoft Order Management. PeopleSoft Order Management sends an acknowledgement of this quote (SALES_QUOTE_NOTICE) to PeopleSoft Order Capture.

Submitting an Order

PeopleSoft Order Capture submits an order (CRM_SALES_ORDER), which is transformed into a subscribe service operation (SALES_CRM_ORDER_LOAD) to PeopleSoft Order Management. PeopleSoft Order Management sends a Sales Order Acknowledgement to PeopleSoft Order Capture.

Maintaining Existing Orders

PeopleSoft Order Capture sends order changes (CRM_SALES_ORDER_CHANGE) which are transformed into a subscribe message (SALES_CRM_ORDER_CHANGE_LOAD) to PeopleSoft Order Management. PeopleSoft Order Management sends an order change acknowledgement (SALES_ORDER_CHANGE_NOTICE) to PeopleSoft CRM.

Checking Order Status

PeopleSoft Order Capture requests current order and order line status (CRM_ORDER_STATUS), transformed into a service operation (SCM_GET_ORD_STATUS) in PeopleSoft Order Management. PeopleSoft Order Management sends back the order status (SALES_ORDER_STATUS) to PeopleSoft Order Capture.

Checking Product Availability

PeopleSoft Order Capture requests product availability information (SCM_GET_PROD_AVAIL) from PeopleSoft SCM.

Shipping an Order

PeopleSoft Order Capture receives advanced shipping notices (ADVANCED_SHIPPING_NOTICE) from PeopleSoft Inventory.

PeopleSoft Billing Integration with PeopleSoft CRM 360 Degree View

PeopleSoft CRM requests and receives invoice information from PeopleSoft Billing.

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See Also

PeopleSoft Enterprise CRM 9.0 Application Fundamentals PeopleBook

PeopleSoft Enterprise Billing 9.0 PeopleBook, "Integrating PeopleSoft CRM with Billing"

PeopleSoft SCM Integration with PeopleSoft FieldService

PeopleSoft FieldService requires real-time item balance and availability checks with PeopleSoft Inventory and Purchasing. Inventory sends information to FieldService, including Inventory business units as storage locations for field service trucks and items.

See Also

PeopleSoft Enterprise Integrated FieldService 9.0 PeopleBook

Using CRM EIPs

You use individual EIPs to integrate SCM applications with CRM applications.

CRM EIPs

You can use the following EIPs to integrate with PeopleSoft CRM:

EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
Advanced Shipping Notice	ADVANCED_ SHIPPING_ NOTICE	Inventory sends PeopleSoft CRM notification that sales orders have been shipped.	Inventory	FieldService, Order Capture	*PeopleSoft Enterprise Integrated FieldService 9.0 PeopleBook* See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Understanding Order Fulfillment Processing," Advanced Shipping Notice EIP.

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EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
Bill Source	BILL_SOURCE_FULLSYNC BILL_SOURCE_SYNC	Syncs bill source information with PeopleSoft CRM.	Billing		*PeopleSoft Enterprise CRM 9.0 Application Fundamentals PeopleBook* See *PeopleSoft Enterprise Billing 9.0 PeopleBook*, "Integrating PeopleSoft CRM with Billing".
Bill Type	BILL_TYPE_FULLSYNC BILL_TYPE_SYNC	Syncs bill type information with PeopleSoft CRM	Billing		*PeopleSoft Enterprise CRM 9.0 Application Fundamentals PeopleBook* See *PeopleSoft Enterprise Billing 9.0 PeopleBook*, "Integrating PeopleSoft CRM with Billing".
Contact	CONTACT_SYNC_EFF, CONTACT_FULLSYNC_EFF	Syncs contact information with PeopleSoft CRM.	SCM	CRM Common	*PeopleSoft Enterprise CRM 9.0 Application Fundamentals PeopleBook* See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining Contacts".

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EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
CRM 360 Degree View	BI_EIP360_REQ BI_EIP360_RSP	CRM requests billing information (bills) from PeopleSoft Billing to display in the 360-Degree View. PeopleSoft Billing responds with the billing information requested from the PeopleSoft CRM 360-Degree View	Billing	CRM Common	*PeopleSoft Enterprise CRM 9.0 Application Fundamentals PeopleBook* See *PeopleSoft Enterprise Billing 9.0 PeopleBook*, "Integrating PeopleSoft CRM with Billing".
Customer	CUSTOMER_ FULLSYNC, CUSTOMER_ SYNC	Syncs customer information with PeopleSoft CRM.	SCM	CRM Common	*PeopleSoft Enterprise CRM 9.0 Application Fundamentals PeopleBookk* See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information," Understanding Enterprise Integration Points.
Customer Group	CUSTOMER_ GROUP_ FULLSYNC, CUSTOMER_ GROUP_SYNC	Syncs customer group information with PeopleSoft CRM.	SCM	CRM Common	*PeopleSoft Enterprise CRM 9.0 Application Fundamentals PeopleBook* See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information," Understanding Enterprise Integration Points.

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EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
InterUnit Receipt	INTERUNIT_ RECEIPT	Updates the status of interunit receipts to indicate whether the quantity on the receipt has been received.	Inventory	FieldService	*PeopleSoft Enterprise Integrated FieldService 9.0 PeopleBook* See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Receiving and Putting Away Stock," Staging Interunit Transfers Using an Electronic Data Collection System.
Inventory Adjustment	INVENTORY_ ADJUSTMENT	Loads inventory adjustments.	Inventory	FieldService	*PeopleSoft Enterprise Integrated FieldService 9.0 PeopleBook* See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Making Stock Quantity Adjustments and Transfers Within the Business Unit," Making Adjustments Using the Inventory Adjustments EIP.
Inventory Item Balance	IN_ITEM_ BALANCES	Queries inventory item balance.	Inventory	FieldService	*PeopleSoft Enterprise Integrated FieldService 9.0 PeopleBook*

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EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
Item Master	ITEM_CRM_ FULLSYNC_ EFF, ITEM_ CRM_SYNC_ EFF	Syncs item information with PeopleSoft CRM.	Inventory	FieldService	*PeopleSoft Enterprise Integrated FieldService 9.0 PeopleBook* See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Loading Items," Setting Up the Item Master EIP.
Order Status	OM_ORDER_ STATUS	Order Capture requests current order and order line status from Order Management.	Order Management	Order Capture	*PeopleSoft Enterprise CRM 9.0 Order Capture Applications PeopleBook*
Product	PRODUCT_ GROUP_ FULLSYNC, PRODUCT_ SYNC	Syncs product information with PeopleSoft CRM.	Order Management	Order Capture	*PeopleSoft Enterprise CRM 9.0 Order Capture Applications PeopleBook* See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Understanding Product Load EIPs.

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EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
Product Configurator Data Sync	CP_CONSTANT_FULLSYNC, CP_CONSTRAINT_FULLSYNC, CP_EXPRESSION_FULLSYNC, CP_GLOBAL_FULLSYNC, CP_INTRN_VAR_FULLSYNC, CP_MATRIX_FULLSYNC, CP_MESSAGED_FULLSYNC, CP_MULTOP_FULLSYNC, CP_OPTION_FULLSYNC, CP_PRINTCD_FULLSYNC, CP_RULE_FULLSYNC, CP_SECONDARY_FULLSYNC, CP_TEMPLATE_FULLSYNC, CP_TREE_FULLSYNC, CP_VALUE_LIST_FULLSYNC	Syncs configuration information with PeopleSoft CRM.	Product Configurator	Order Capture	*PeopleSoft Enterprise CRM 9.0 Order Capture Applications PeopleBook* See *PeopleSoft Enterprise Product Configurator 9.0 PeopleBook*, "Synchronizing PeopleSoft Product Configuration Data".

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EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
Product Availability	PSPRODAVAIL	Order Capture queries product availability from Order Management.	Inventory	Order Capture	*PeopleSoft Enterprise CRM 9.0 Order Capture Applications PeopleBook* See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Inquiring and Reporting About On-Hand Stock," Providing Item Availability Checks to Third-Party Systems.
Product Group	PRODUCT_ GROUP_ FULLSYNC, PRODUCT_ SYNC	Syncs product group information with PeopleSoft CRM.	Order Management	Order Capture	*PeopleSoft Enterprise CRM 9.0 Order Capture Applications PeopleBook* See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Understanding Product Load EIPs.
Purchase Order and Interunit Transfer Information	RF_GETPOIUT	Queries PO and IUT Information from CRM	Inventory	FieldService	*PeopleSoft Enterprise Integrated FieldService 9.0 PeopleBook*

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EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
Purchase Order Receipt	PURCHASE_ ORDER_ RECEIPT	Updates the status of purchase order receipts to indicate whether the quantity on the receipt has been received.	Purchasing	FieldService	*PeopleSoft Enterprise Integrated FieldService 9.0 PeopleBook* See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Receiving Shipments".
Purchase Order Requisition	PURCHASE_ ORDER_ REQUISITION_ CRM	Loads requisition data from PeopleSoft CRM.	Purchasing	CRM Common	*PeopleSoft Enterprise CRM 9.0 Application Fundamentals PeopleBook* See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Creating Requisitions Online".
Sales Order	PSGETID	Order Capture calls this EIP to get the next order number from OM.	Order Management	Order Capture	*PeopleSoft 9.0 CRM Collaborative Selling PeopleBook* See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".

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EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
Sales Order Acknowledgement	SALES_ ORDER_ ACKNOWLEDGEMENT	Order Management publishes an acknowledgement indicating that an order has been received.	Order Management	Order Capture	*PeopleSoft Enterprise CRM 9.0 Order Capture Applications PeopleBook* See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".
Sales Order Change	SALES_CRM_ ORDER_ CHANGE_ LOAD	Order Management publishes an acknowledgement of changes made to an order that was created using the Sales Order or CRM Sales Order message.	Order Management	Order Capture	*PeopleSoft Enterprise CRM 9.0 Order Capture Applications PeopleBook* See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".
Sales Order Load	SALES_CRM_ ORDER_LOAD, SALES_CRM_ QUOTE_LOAD	Order Management loads sales order header, line and shipment information from Order Capture.	Order Management	Order Capture	*PeopleSoft Enterprise CRM 9.0 Order Capture Applications PeopleBook* See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".

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EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
Sales Order Notice	SALES_ ORDER_ CHANGE_ NOTICE	Dispatches a sales order.	Order Management	Order Capture	*PeopleSoft Enterprise CRM 9.0 Order Capture Applications PeopleBook* See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".
Sales Order Status	SALES_ ORDER_ STATUS	Publish sales order information, including the order tracking status.	Order Management	Order Capture	*PeopleSoft Enterprise CRM 9.0 Order Capture Applications PeopleBook* See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".
Sales Quote Notice	SALES_ QUOTE_ NOTICE	Order Management sends a quote acknowledgement to Order Capture.	Order Management	Order Capture	*PeopleSoft Enterprise CRM 9.0 Order Capture Applications PeopleBook* See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Using Sales Order and Quotation Enterprise Integration Points".

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EIP	Technical Name	Functional Definition	SCM Application	CRM Application	Reference
Standard Note	STD_NOTE_ FULLSYNC, STD_NOTE_ SYNC	Syncs standard note information with PeopleSoft CRM.	Order Management	CRM Common	*PeopleSoft Enterprise CRM 9.0 Application Fundamentals PeopleBook* See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining Additional Customer Information," Setting Up Standard Notes.
Tax Codes	TAX_ HEADER_TBL_ FULLSYNC	Syncs tax code information with PeopleSoft CRM	Billing		*PeopleSoft Enterprise CRM 9.0 Application Fundamentals PeopleBook* See *PeopleSoft Enterprise Billing 9.0 PeopleBook*, "Integrating PeopleSoft CRM with Billing".

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PART 8

Integrating with Supply Chain Business Modeler

Chapter 14
Integrating with Supply Chain Business Modeler

CHAPTER 14

Integrating with Supply Chain Business Modeler

This chapter provides an overview of the PeopleSoft Supply Chain Management integration with the Supply Chain Business Modeler and discusses how to:

- Export data to Supply Chain Business Modeler.
- Import data from Supply Chain Business Modeler.

Understanding the PeopleSoft Supply Chain Management Integration with the Supply Chain Business Modeler

This diagram illustrates the integration between PeopleSoft Supply Chain Management and the Supply Chain Business Modeler:

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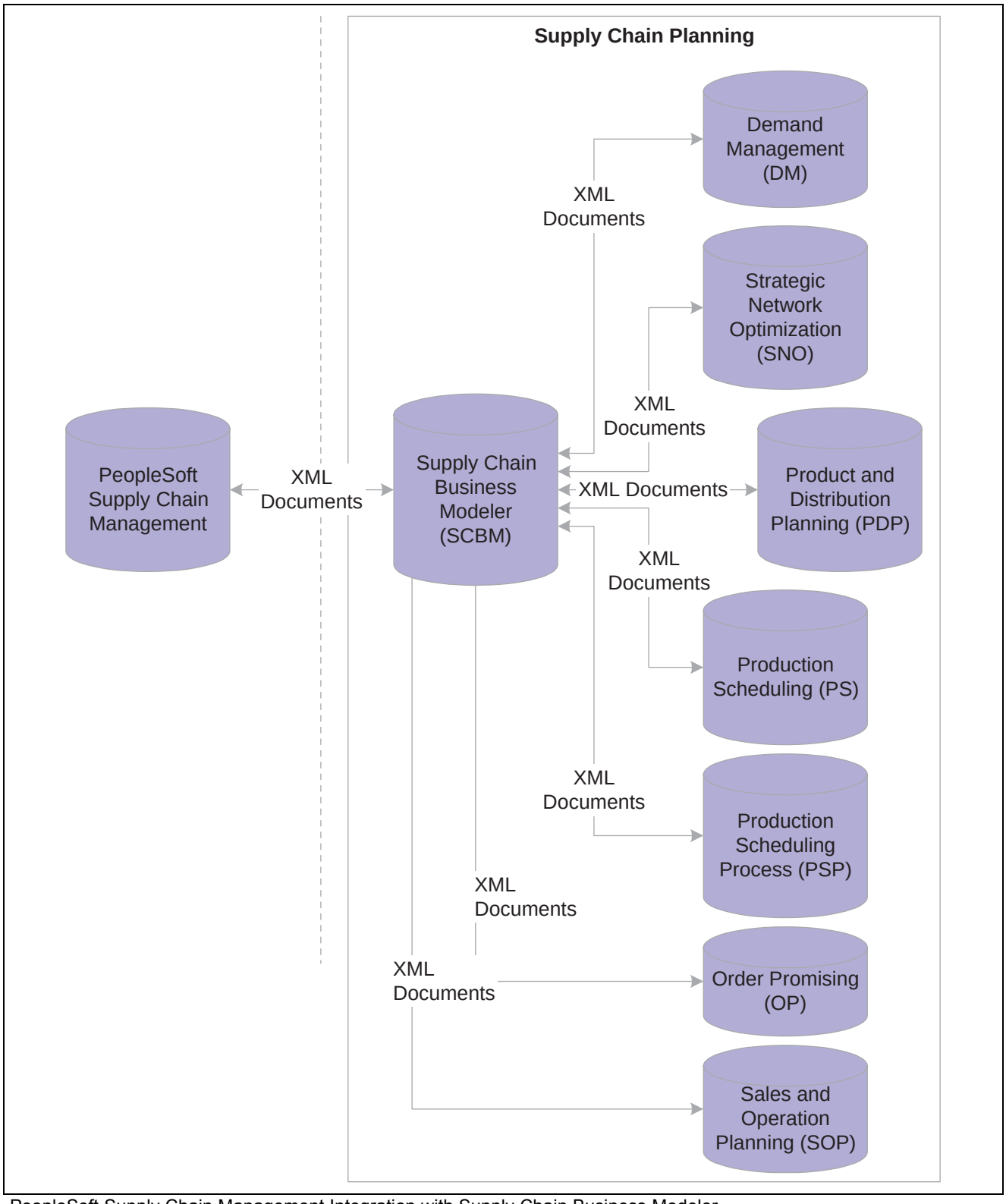

PeopleSoft Supply Chain Management Integration with Supply Chain Business Modeler

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PeopleSoft Supply Chain Management integrates with the Supply Chain Business Modeler (a part of Supply Chain Planning) by passing a wide range of supply chain data to the Supply Chain Business Modeler in the form of XML documents. The data that is passed through the XML documents is not planning-model specific but rather a base representation of data that will be used by various planning models. The Supply Chain Business Modeler is a central planning data repository for the Supply Chain Planning Products (Demand Management (DM), Strategic Network Optimization (SNO), Production and Distribution Planning (PDP), Production Scheduling (PS), Production and Scheduling Process (PSP), Order Promising (OP), and Sales and Operation Planning (SOP).

Once the supply chain management data resides within the Supply Chain Business Modeler it is then used to build tactical, operational, or strategic planning models and model partitions. The model partitions are used to generate data needed for specific Supply Chain Planning products. After the Supply Chain Planning products are done with their analysis they then pass their individual information (plans) back to the Supply Chain Business Modeler.

At that point, once again PeopleSoft Supply Chain Management integrates with the Supply Chain Business Modeler by importing that planning data back into PeopleSoft Supply Chain Management and acting upon the recommendations from the planning products.

PeopleSoft Predefined XML Documents

PeopleSoft provides the following predefined XML documents for exporting data from PeopleSoft Supply Chain Management to Supply Chain Business Modeler:

XML Document	Associated Data
Configuration	Model parameters
Calendar	Calendar
Base	• Item • Standard UOM (unit of measure) • Item UOM (unit of measure) • Item Group • Branch • Branch Group • Storage • Storage Requirement Set • Item Storage • Item Branch • Inventory Policy
Distribution	• Lane • Transport Mode • Item Transport Mode
Supplier	• Supplier • Supplier Item

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XML Document	Associated Data
Customer	Customer
Manufacturing	• Operation • Produced Item • Produced Item BOM (bills of material) • Consumed Item BOM (bills of material) • Operation BOR (bill of resources) • Routing • Operation Set • Branch Operation Set • Temporal Relation • Branch Operation • Branch Routing • Resource • Crew • Machine • Tool • Consumed Item Set • Resource Set
Forecasts	• Enterprise Forecast • Enterprise Forecast Detail
Sales Orders	• Sales Orders • Sales Order Details
Sales Order History	Sales Order History
Transfer Orders	• Transfer Order • Transfer Order Detail
Beginning Inventory	Beginning Inventory
Work Orders	• Work Order • Work Order Routing • Work Order Parts List
Purchase Orders	• Purchase Order • Purchase Order Detail
Safety Parameters	Safety Parameters
Inventory Safety Targets	Inventory Safety Targets

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PeopleSoft provides the following predefined XML documents for import data from Supply Chain Business Modeler:

XML Document	Associated Data
Purchase Order	Information for the XML document is extracted from the Supply Chain Business Modeler. Data in this document is used to establish a picture of existing purchase orders sent to the Supply Chain Business Modeler. This picture of the existing orders will be used to populate original order data in the planning instance tables and also be used to identify orders that will be marked as canceled as a result of the optimized plan. Any order sent into the Supply Chain Business Modeler but not received back on a purchase order recommendation out of the Supply Chain Business Modeler will assumed to be canceled.
Transfer Orders	Information for the XML document is extracted from the Supply Chain Business Modeler. Data in this document is used to establish a picture of existing transfer orders sent to the Supply Chain Business Modeler. This picture of the existing orders will be used to populate original order data in the planning instance and also identify orders that will be marked as canceled as a result of the optimized plan. Any order sent into the Supply Chain Business Modeler but not received back on a net deployment out of the Supply Chain Business Modeler will assumed to be canceled.
Work Orders	Information for the XML document is extracted from the Supply Chain Business Modeler. Data in this document is used to establish a picture of existing production orders sent to the Supply Chain Business Modeler. This picture of the existing orders will be used to populate original order data in the planning instance and also identify orders that will be marked as canceled as a result of the optimized plan. Any order sent into the Supply Chain Business Modeler but not received back on either a net production requirement or a production schedule out of the Supply Chain Business Modeler will assumed to be canceled.
Enterprise Forecast	The Enterprise Forecast XML document contains forecast information that was generated by Demand Management (DM). Only inventoried items are sent to the Supply Chain Business Modeler as a part of the standard integration so it is assumed that only Inventory Item forecast will be received out of the Supply Chain Business Modeler.
Net Deployment Requirements	The Net Deployment Requirements XML document contains information about inventory transfers between two business units and represents results out of the Production and Distribution Planning (PDP). Details for net deployments may contain data for existing transfers as well as new inter unit transfer requirements.

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XML Document	Associated Data
Net Production Requirements	The Net Production Requirements XML document contains information about production requirements for an item at a given branch and represents the results out of the Production and Distribution Planning (PDP). Details for net production requirements may contain data for existing production as well as new production requirements.
Production Schedules	The Production Schedule XML document contains detailed production information including specific operations, resources, and material to use in the manufacturing process. Production schedule information can be produced by Production and Distribution Planning and production schedule information can also be produced by Production Scheduling (PS) and Production Scheduling Process (PSP). Production Schedules may contain both existing and new production.
Purchase Order Recommendations	The purchase order recommendations XML document contains information regarding purchases that need to be made based on predefined supplier/item relationships. Purchase order recommendations can be produced by Production and Distribution Planning. The information may contain both new and existing purchase orders.

See Also

PeopleSoft Enterprise Supply Planning 9.0 PeopleBook, "Committing PeopleSoft Supply Planning Updates," Posting PeopleSoft Supply Planning Updates to the Transaction System

EnterpriseOne Demand Management 8.12 PeopleBook

EnterpriseOne Supply Chain Business Modeler 8.12 PeopleBook

EnterpriseOne Strategic Network Optimization 8.12 PeopleBook

EnterpriseOne Production & Distribution Planning 8.12 PeopleBook

EnterpriseOne Production Scheduling 8.12 PeopleBook

Exporting Data to Supply Chain Business Modeler

This section discusses how to export data to Supply Chain Business Modeler.

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Page Used to Export Data to Supply Chain Business Modeler

Page Name	Object Name	Navigation	Usage
Export data to SCBM	APS_OUT_RUN	SCM Integrations, Advanced Planning, Export data to SCBM	Initiate the Export data to SCBM - Single Application Engine process (APS_O_MAIN) or initiate the Export data to SCBM - Multi Application Engine process (APS_OUT). Both of these processes export the XML documents from PeopleSoft Supply Chain Management to the Supply Chain Business Modeler. The Export Data to SCBM - Single process runs the XML documents serially where as the Export Data to SCBM - Multi process allows for the XML documents to be generated in parallel and can take advantage of multiple CPU environments.

Exporting Data to Supply Chain Business Modeler

Access the Export data to SCBM page.

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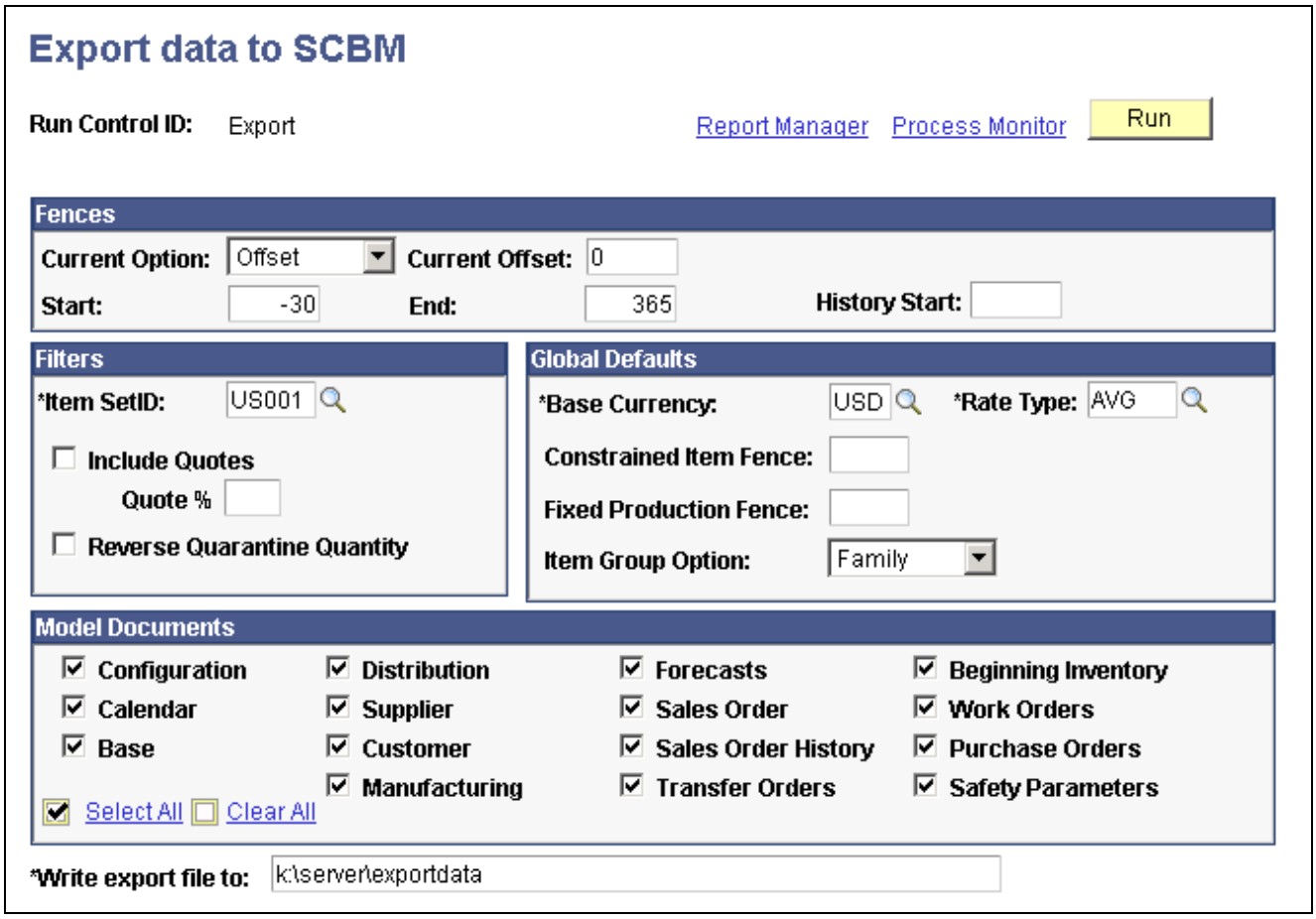

Export data to SCBM page

Fences

Current Option Select how you want to specify the current date. You can enter a specific date or an offset in days from the system date. Values are:

- *Date*
- *Offset*

Current Date Select the current date. This field is available if you select *Date* as the Current Option.

Current Offset Enter the current offset in days. This field is available if you select *Offset* as the Current Option.

Start Enter the start fence in days from the current time. This value can be negative and the start fence must be less than or equal to the current time.

End Enter the end fence in days from the current time. This value can be negative and the end fence must be greater than the current time.

History Start Enter the history start fence in days from the current time. This value can be negative and the history start fence must be less than current time.

The system will only use the history start fence when selecting data for the Sales Order History XML Document.

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Filters

Item Set ID — Select the item Set ID for the data that you would like to export to Supply Chain Business Modeler.

Include Quotes — Select this check box if you want to include quotes in the data that is passed to the Supply Chain Business Modeler.

Quote % (quote percentage) — If you select to include quotes, than enter the quote percentage to include. Quotes with an acceptance percentage equal to or greater than the value entered will be included in the data sent to the Supply Chain Business Modeler.

Reverse Quarantine Qty (reverse quarantine quantity) — Select this check box if you want to reverse the quarantine quantity from the quantity on hand that is sent to the Supply Chain Business Modeler using the Base XML document.

Global Defaults

Base Currency — Select a base currency. This currency and rate are used for formatting costs and prices into a common currency within Supply Chain Business Modeler.

Rate Type — Select a rate type. This currency and rate are used for formatting costs and prices into a common currency within Supply Chain Business Modeler.

Constrained Time Fence — Enter a constrained time fence in number of days. This value must be greater than or equal to zero. The Base XML Document uses this value to populate the constrained item fence value directly on the Item Branch attribute.

Fixed Production Fence — Enter a fixed production fence in number of days. This value must be greater than or equal to zero. The Base XML Document uses this value to populate the fixed production fence attribute on machines, crews, and tools directly.

Item Group Option — Select how you want to control formatting of the item group within Supply Chain Business Modeler. Values are:

- *Family:* Item Family
- *Group:* Item Group

Model Documents

Configuration, Calendar, Base, Distribution, Supplier, Customer, Manufacturing, Forecasts, Sales Orders, Sales Order History, Transfer Orders, Beginning Inventory, Work Orders, Purchase Orders, and **Safety Parameters** — Select the check box next to each of the different types of XML documents that you want to have created and exported to the Supply Chain Business Modeler.

— Click theSelect All button to select all of the XML Documents at once.

— Click theClear All button to clear the selection of any XML Documents.

Write Export Files To — Enter the output directory, folder, or URL for the exported XML Documents.

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Importing Data From Supply Chain Business Modeler

This section discusses how to import data from Supply Chain Business Modeler.

Page Used to Import Data From Supply Chain Business Modeler

Page Name	Object Name	Navigation	Usage
Import data from SCBM	APS_IN_RUN	SCM Integrations, Advanced Planning, Import data from SCBM	Initiate the Import data from SCBM - Single Application Engine process (APS_I_MAIN) or initiate the Import data from SCBM - Multi Application Engine process (APS_IN). Both of these processes import the XML documents from the Supply Chain Business Modeler to PeopleSoft Supply Chain Management. The Import data from SCBM - Single process runs the XML documents serially where as the Import data from SCBM - Multi process allows for the XML documents to be generated in parallel and can take advantage of multiple CPU environments.

Importing Data From Supply Chain Business Modeler

Access the Import data from SCBM page.

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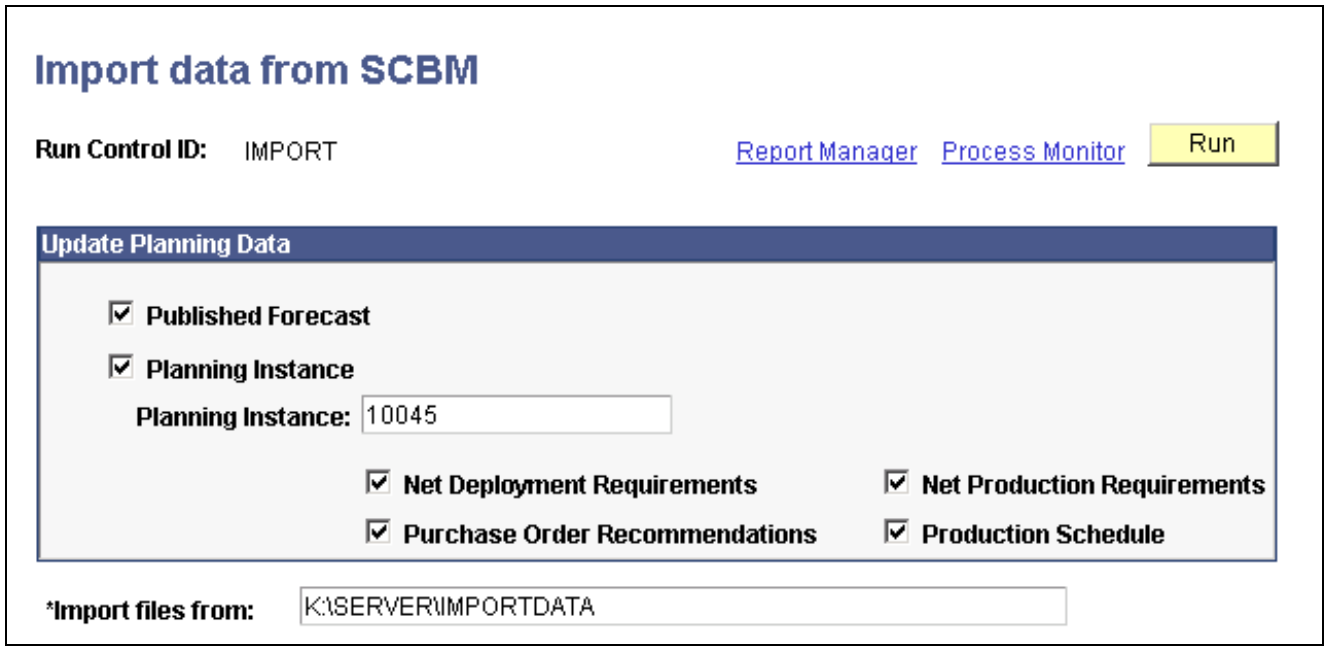

Import data from SCBM page

Published Forecast Select this check box if you want to want to update published forecast planning data to PeopleSoft Supply Chain Management.

Planning Instance, Planning Instance Select this check box if you want to update a particular planning instance of planning data to PeopleSoft Supply Chain Management. Then enter the planning instance in the Planning Instance field.

Net Deployment Requirements If you select to update by planning instance, then select this check box if you want to import net deployment requirements.

Net Production Requirements If you select to update by planning instance, then select this check box if you want to import net production requirements.

Purchase Order Recommendations If you select to update by planning instance, then select this check box if you want to import purchase order recommendations.

Production Schedule If you select to update by planning instance, then select this check box if you want to import the production schedule.

Import Files From Enter the location of the XML documents that you want to import.

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PART 9

Integrating with Sales and Use Tax Applications

Chapter 15
Calculating Sales and Use Tax in Supply Chain Management

Chapter 16
Integrating With Vertex O Series

Chapter 17
Integrating With Vertex Q Series

Chapter 18
Integrating With Taxware Enterprise

Chapter 19
Integrating with Taxware Sales and Use Tax

CHAPTER 15

Calculating Sales and Use Tax in Supply Chain Management

This chapter provides an overview of PeopleSoft tax solutions and discusses how to:

- Set up third-party tax vendors.
- Associate address information with geocodes.
- Interact with third-party tax vendors.
- View tax calculation errors in PeopleSoft Billing.
- Review third-party tax liability reporting.
- Compare U.S. and Canadian tax support.
- Review and modify tax jurisdiction level translation.

Understanding PeopleSoft Tax Solutions

PeopleSoft Billing supports the use of five sales and use tax solutions: PeopleSoft Tax Tables and two solutions each from the vendors Vertex and Taxware. PeopleSoft Tax Tables, included with PeopleSoft Billing, meets simple sales tax requirements but requires you to maintain tax rates. Provided interfaces enable PeopleSoft Billing to use two third-party tax vendors: Taxware and Vertex. These vendors provide solutions to the most complex sales tax requirements and maintain tax rates for you.

Note. If you use Taxware Sales and Use Tax, the Taxware STEP and Verazip modules are optional but recommended. Check with the tax vendors for the versions of their software that are available for the different releases of PeopleSoft.

Comparing PeopleSoft Tax Tables to Third-Party Tax Vendors

Third-party tax solutions provide a more complex set of features for sales and use tax calculations than PeopleSoft tax tables. The following table compares PeopleSoft tax tables with third-party solutions:

PeopleSoft Tax Tables	Third-Party Solutions
You must manually maintain tax rates.	The vendor provides monthly tax updates.

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PeopleSoft Tax Tables	Third-Party Solutions
You must determine and manually check for exemptions. Exemption status is not determined at the time of calculation. If an order line, bill line, or purchase order line is not marked as tax-exempt, taxes are calculated.	The tax vendor system determines exemption status at the time of tax calculation. The tax vendor system maintains customer exemption certificates and product tax rules.
Tax rates come from the tax authorities of a tax code on the transaction. A tax code loosely represents a taxing jurisdiction. In PeopleSoft Billing, the tax code can be entered manually on a bill line, or it can be populated automatically from the ship-to customer onto the bill during bill entry or through the bill interface. In PeopleSoft Order Management, the tax code can be entered manually, or it can be populated automatically from the ship-to customer for the order line or schedule. In PeopleSoft Purchasing, the tax code can be entered manually on a purchase order, or it can be populated automatically from the ship-to location to the purchase order schedule.	Tax rates and jurisdictions are determined from ship-to, ship-from, order origin, and order acceptance address information on the transaction.
Tax liability is maintained in separate accounts for each tax authority.	Tax liability is maintained in one account for the business unit.

Understanding Tax Integration Technologies

PeopleSoft supports integration with four sales and use tax solutions from two third-party vendors:

- Taxware Enterprise
- Vertex O Series
- Taxware Sales and Use Tax
- Vertex Q Series

Web Service Integrations

Taxware Enterprise and Vertex O Series are both implemented as web services. PeopleSoft applications communicate with these web services through the PeopleSoft Integration Broker. The Integration Broker uses the URL of the web service to conduct transactions with these tax solutions.

A streamlined connection method is available for Vertex O Series. The *Java Direct XML Post* method provides faster transaction speed; however, because this method bypasses the integration gateway, there is no transaction logging, which can be useful when troubleshooting problems. The connection method can be specified in PeopleSoft, on the Setup Financials/Supply Chain, Install, Tax Provider Installation page.

Business Interlink Integrations

PeopleSoft applications communicate with Taxware Sales and Use Tax and Vertex Q Series through Business Interlink objects and plug-ins. The Business Interlink object is part of the PeopleSoft system, but the Interlink plug-ins and associated integration software are provided by Taxware or Vertex. The plug-in and integration software must be installed on the PeopleSoft application and Process Scheduler servers. Initialization files, the Microsoft Windows Registry, or environment variables are used to store the information needed to connect to the main tax solution software and databases.

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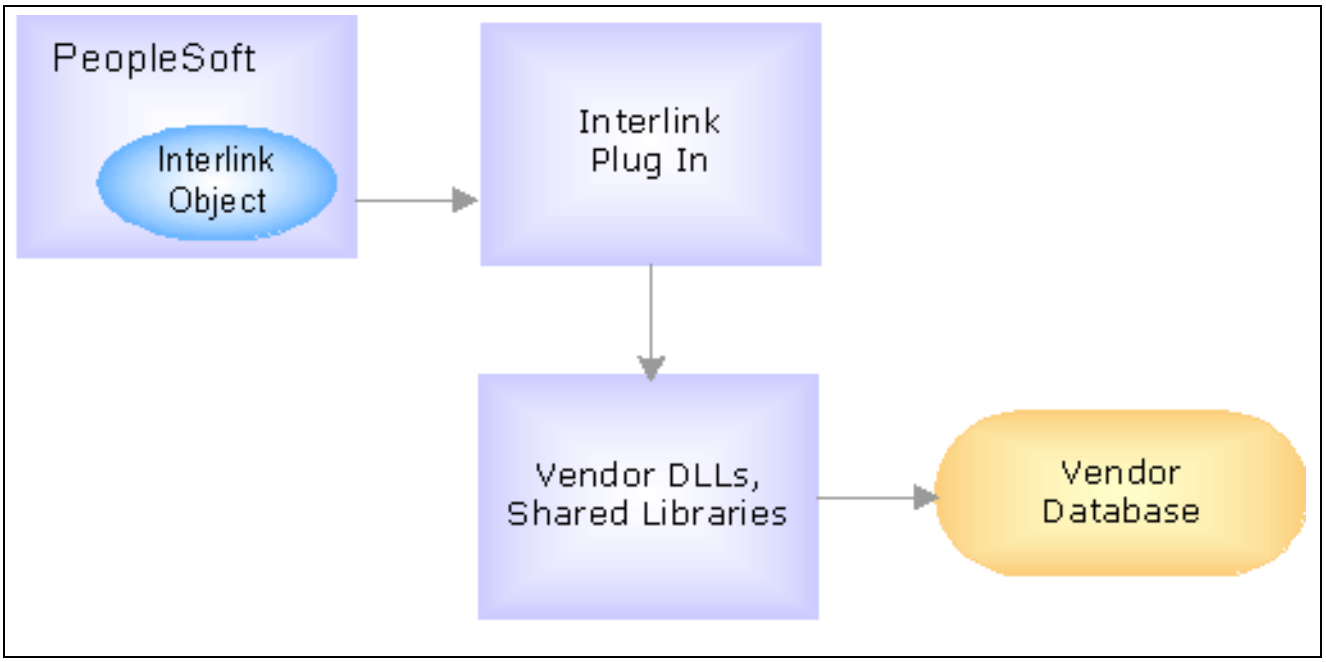
The following diagram shows the integration:



Third-party tax solution integration

The PeopleSoft interlink object communicates with the interlink plug-in, which in turn communicates with the tax solution and database through the vendor shared libraries. The generic tax vendor dynamic link libraries (DLLs), or shared libraries, are typically delivered by the tax vendors to all customers. Each vendor has a unique set of DLLs. The tax vendor database objects are the repositories for geocodes, tax rates, exception information, and transactions.

Note. An Interlink plug-in can also be installed on a Windows client running the PeopleSoft Application Designer to facilitate two-tier testing. Additional vendor-supplied software may be required, as typically only software for the target production operating system is provided.

See Also

Chapter 16, “Integrating With Vertex O Series,” page 349

Chapter 17, “Integrating With Vertex Q Series,” page 355

Chapter 18, “Integrating With Taxware Enterprise,” page 361

Chapter 19, “Integrating with Taxware Sales and Use Tax,” page 365

http://www.peoplesoft.com/corp/en/products/dev_integration_portals/isr/index.jsp

Setting Up Third-Party Tax Solutions

You must perform the following steps to configure PeopleSoft applications to conduct transactions with a third-party tax solution. The third-party tax vendor software should be physically installed and running before carrying out these steps.

To set up PeopleSoft to use a third-party tax solution for tax calculations:

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1. Select a tax vendor on the Installation Options - Overall page.

   The selection in the Tax Vendor list box indicates which tax vendor's solution is installed for the PeopleSoft database. This tax vendor validates postal codes on customer address, vendor address, location address, and transaction address pages.

2. Define the tax solution installation options on the Tax Provider Installation page.

3. Select whether to use the tax vendor on the Billing Definition - Business Unit 2 page and the Taxes and Currency page of the PeopleSoft Order Management business unit definition.

   Transactions in these business units have tax calculations performed by the installed tax vendor.

4. (Required for PeopleSoft Purchasing) Select whether to use the tax vendor on the Purchasing Definition - Business Unit Definition page.

Order to Cash-Specific Tax Vendor Setup

Complete these steps for PeopleSoft Billing and PeopleSoft Order Management:

1. Set up tax customer groups.

   You can associate ship-to customers with tax customer groups by selecting *Tax* as the group type. The system passes both the customer ID and tax customer group through the interface to the tax vendor to find exceptions in the tax vendor database based on customer or customer group.

2. Predefine exemption certificates for eligible customers on the General Information - Tax Exempt Certificate Info page, if customer exemption will be maintained in PeopleSoft instead of in the third-party tax vendor's database.

   When you enter sales orders that are exempt from taxes, select the Tax Exempt check box on the Header Ship-To Defaults page, and select from the exemption certificates defined for the customer.

   When entering bill lines that are exempt from taxes, select the Tax Exempt option on the Standard Billing - Line - Tax Info page, and select from the exemption certificates defined for the customer.

   The Tax Exempt option on the sales order or bill line is the only way to override third-party tax vendor tax rules. The third-party tax vendor software logs the transaction as a user exception and does not tax the line.

The following steps are specific to PeopleSoft Order Management:

1. Define tax options for a product on the Product Definition - Options page.

   Associate a tax product number defined on the third-party tax database with the product identifier. The system passes the tax product number to the third-party tax vendor system during tax calculation. You can define special rates or exceptions for the tax product number in the tax vendor system. The third-party tax vendor determines the correct tax rate for the product.

   The transaction type and subtype that you enter are default values that the system passes to the third-party tax vendor system during tax calculation.

2. Associate the product with a tax product group on the Product Group page.

   The system passes the tax product group to the third-party tax vendor system during tax calculation. You can define special rates or exceptions for the tax product group in the tax vendor system. The third-party tax vendor determines the correct tax rate for the product group.

The following step is specific to PeopleSoft Billing:

Define tax defaults for Billing charge codes on the Charge Code page.

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Associate a charge code tax group with a Billing charge code. Also define a default transaction type and subtype to be passed to the third-party tax vendor system during tax calculation for a bill line for this charge code.

See Also

PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook, "Maintaining General Customer Information," Adding General Customer Information

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Setting Up Cross-Application Installation Options

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Defining Tax Provider Installation Options

PeopleSoft Enterprise Order Management 9.0 PeopleBook, "Maintaining Order Header and Line Information"

PeopleSoft Enterprise Billing 9.0 PeopleBook, "Establishing PeopleSoft Billing Business Units"

PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook, "Setting Up Products"

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Defining PeopleSoft Purchasing Business Units and Processing Options," Understanding Business Units in PeopleSoft Purchasing

Understanding Tax Product Groups

Set up charge code and product tax groups to take advantage of exception processing in the third-party tax vendor system. These tax groups must be defined in the tax vendor system. You can create or update charge codes and products with the applicable tax groups. In PeopleSoft Billing, the system populates the default charge code tax group on a bill during bill entry, and the system passes that value to the tax vendor during tax calculation.

PeopleSoft correlates the tax group to a different entity in each of the supported tax solutions.

Tax Solution	Tax group equivalent
Vertex Q Series	Product Category
Vertex O Series	Product Class
Taxware Sales and Use Tax	Product Code
Taxware Enterprise	Not used. In Order Management, the product code corresponds to the Taxware Enterprise goods/services code. In Billing, the identifier corresponds to the Taxware Enterprise goods/services code.

If you use Taxware Sales and Use Tax system, you can

- Create tax groups equivalent to the product codes supplied by Taxware that apply to your business.
- Map the tax groups defined in PeopleSoft to Taxware product codes within Taxware.
- Use the Taxware STEP system to set up tax exceptions for tax groups defined in PeopleSoft that are not equivalent to Taxware product codes.

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If you use Vertex, you can set up tax exceptions for product categories or classes and product IDs. The product categories or classes defined in Vertex should also be defined as tax groups in PeopleSoft. You may need to add the products defined in PeopleSoft as Vertex product IDs, if you define tax exceptions by product IDs. If necessary, map the product categories and product IDs defined in Vertex Q Series to product categories and subcategories defined in Vertex Q Series Taxability Mapping Tool (TMT).

Tax Product Groups in PeopleSoft Order Management

The sales order line and schedule designate a product ID. You can associate a tax product group with the product. PeopleSoft Order Management sends the product ID and the tax product group to the third-party tax vendor system, which determines what takes precedence when retrieving the appropriate tax rate used in tax calculation.

Tax Product Groups in PeopleSoft Billing

The bill line contains two product-related fields: the Identifier field and the Tax Group field. The system passes both fields to the third-party tax vendor system. When you enter a line during bill entry, the default tax group on the line appears from the tax group associated with the charge code used as the identifier.

See Also

PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook, "Setting Up Products"

Associating Address Information with Geocodes

A combination of addresses stored on a transaction enables the tax vendor system to determine which taxing jurisdictions and tax rates to use. Each address can be associated with a geocode provided by the tax vendor system.

This section provides an overview of geocodes and discusses how to associate customer and location addresses with geocodes.

Note. The term *Tax Area ID* is used in place of *Geocode* in Vertex O Series. *Geocode* is used within PeopleSoft applications for all third-party tax solutions.

Understanding Geocodes

Both Taxware and Vertex use geocodes, although each tax vendor system uses it differently. On any page where geocodes can be assigned, you can click the Geocode Lookup link to access the Tax Geocode Selection page. This link appears only if the installation options specify a tax vendor and the address country is U.S.A. or Canada.

During geocode lookup, the system passes address information such as address line 1, city, county, state, postal code, and country to the third-party tax vendor. The tax vendor software uses these address fields to determine a geocode.

Note. Address combinations must be valid in order to ensure that the third-party tax vendor software returns a valid geocode. For example, the city, state, and postal code combination must be valid.

Invalid addresses produce a jurisdiction determination error, which prevents the system from calculating taxes.

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Note. During tax calculation, if address information is passed to Vertex without a geocode, Vertex assigns the geocode with the highest tax rate from the possible choices.

Refer to the third-party tax vendor documentation for more details on how your tax solution uses geocodes or tax area Ids.

Page Used to Associate Address Information with Geocodes

Page Name	Object Name	Navigation	Usage
Tax Geocode Selection	TAX_GEOCODE_TMP	Click the Geocode Lookup link on an address page.	Select a geocode to associate with an address.

Associating Addresses with Geocodes

Access the Tax Geocode Selection page.

Geocode Select a single geocode to associate with an address.

Auto Fill Address Select to have the system populate the address page with information from the selected geocode.

In City Limit If populated, indicates that the address is within the city limit.

Warning! When you select a geocode, the city and state from the geocode page overrides the city and state on the original address page, if you also selected the Auto-Fill Address option. If you attempt to change the state or city after a geocode has been assigned, a warning message appears with the option to clear old geocodes, to prevent inconsistency between the assigned geocode and the rest of the address.

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Creating Purchase Orders Online," Entering Purchase Order Schedule One-time Address Information

Interacting with Third-Party Tax Vendors

PeopleSoft Billing, PeopleSoft Order Management, and PeopleSoft Purchasing interact with third-party tax software for the following reasons:

- Geocode lookup.
- Online tax calculation in PeopleSoft Order Management, PeopleSoft Billing, and PeopleSoft Purchasing.
- Order completion processing (batch processing in PeopleSoft Order Management).
- Invoicing (batch processing in PeopleSoft Billing).
- Procurement card processing (batch processing in PeopleSoft Purchasing).

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Note. The ship-to customer ID and address number are required for all third-party tax processing in Order Management and Billing.

The system does not send the transaction to Vertex Q Series or Taxware Sales Tax for calculation if the ship-to address is not a U.S. or Canadian address.

Note. Maximum tax calculation is supported at the line level and the document level with release 8.9. Prior to release 8.9, maximum tax calculation is supported at the line level only.

Calculating Taxes in PeopleSoft Order Management

In PeopleSoft Order Management, the system calculates and saves taxes when you change the order and click the Calculate Price button. The Order Completion process calculates taxes for orders that are entered using electronic data interchange, returned material authorization replacement sales orders, and buying releases. The system uses this tax information when printing sales orders acknowledgments and quotations. You can also view the summarized tax amount on the Order Entry Form page.

The calculated tax amount is only an estimate of taxes for an order, and it is not posted to any tax registers. If you have PeopleSoft Billing installed, the system recalculates taxes even if they have been calculated previously in the order entry process online or by the Order Completion process.

Note. For typical sales orders where the payment is set to on account, PeopleSoft Order Management does not pass tax calculations to PeopleSoft Billing. However, in the counter sale environment, the tax calculations are passed to Billing. Taxes will not be recalculated in Billing when the transaction is fully paid up front and your installation is using the PeopleSoft tax solution as opposed to a third-party tax solution.

Calculating Taxes in PeopleSoft Billing

In PeopleSoft Billing, the system calculates taxes when you click the Calculate Taxes button on the Bill Summary page, and when you run the pro forma or finalization processes.

Note. The system does not calculate taxes or VAT for a bill line when the bill line's tax timing option (populated by PeopleSoft Contracts) is defined as *S* (taxes on services rendered).

Calculating Taxes in PeopleSoft Purchasing

In PeopleSoft Purchasing, the system calculates taxes when you:

- Click the Calculate button on the Maintain Purchase Order - Purchase Order page or the Express Purchase Order - Purchase Order page when entering a purchase order or a change order online.
- Click the Calculate SUT button on the Maintain Purchase Order - Sales/Use Tax Information for Schedule page or Express Purchase Order - Sales/Use Tax Information for Schedule page when entering a purchase order or change order online.
- Perform the Purchase Order Calculations Application Engine process (PO_POCALC) that creates purchase orders.
- Perform the Change Purchase Order Application Engine process (PO_POCHNG) that creates change orders.

When you perform one of these actions, the system evokes the TaxCalc API process, which calculates your sales and use tax.

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See Also

PeopleSoft Enterprise Order Management 9.0 PeopleBook, "Processing Sales Orders," Running Order Completion/Repricing

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Creating Purchase Orders Online," Creating Purchase Order Headers

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Creating Purchase Orders Online," Creating Purchase Order Schedules

Interacting with Third-Party Tax Solutions During Geocode Lookup

If you selected a third-party tax vendor on the Installation Options - Overall page, the system displays a geocode lookup link on the following pages:

- Location - Location Definition page.
- Customer address pages.
- Sold-to Address Override page.
- PeopleSoft Billing Ship-to Override page.
- PeopleSoft Purchasing Schedule One-Time Address page.

When you click the geocode lookup link, for a U.S. or Canadian address, PeopleSoft will request the geocode from the external tax system. The system displays geocode results from the tax vendor system on the Tax Geocode Selection page.

Note. Although selecting Taxware or Vertex as the tax vendor on the Installation Options - Overall page enables geocode lookups, business units must also be set up for tax calculations to be performed through a third-party tax solution.

See Also

http://www.peoplesoft.com/corp/en/products/technology/oif/eip_catalog.jsp

PeopleSoft Enterprise Order Management 9.0 PeopleBook, "Processing Sales Orders," Running Order Completion/Repricing

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Setting Up Cross-Application Installation Options

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Setting Up Locations

PeopleSoft Enterprise Billing 9.0 PeopleBook, "Entering Bills Online," Entering Bill Source Information

Enterprise PeopleTools 8.48 PeopleBook: PeopleCode API Reference

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Creating Purchase Orders Online," Entering Purchase Order Schedule One-time Address Information

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Interacting with Third-Party Tax Vendors During Online Tax Calculations

You can initiate online tax transactions in PeopleSoft Order Management, Billing and Purchasing.

Online Tax Calculation in PeopleSoft Order Management

You trigger online tax calculations in PeopleSoft Order Management on the order line and order schedule pages by saving a valid order or click the Calculate Price button on the Order Entry Form or Shipment Schedules page.

PeopleSoft conducts a transaction with the external tax system, either through a web service or a business interlink. The data passed to the tax system in the transaction includes the tax company or organization, customer information including addresses, product information, and the line or schedule quantity, and the line or schedule amount. PeopleSoft Order Management tables are updated with tax information, including the tax amount and tax percentage.

Note. The taxes calculated in PeopleSoft Order Management are only temporary and are not logged by the tax vendor software. Actual taxes will be calculated when the invoice is finalized in Billing.

In the case of fully paid sales orders, the Billing Finalization process sends the invoice to the tax solution so that the amounts can be logged. Billing uses the original transaction date so that the taxes logged will match the taxes paid, in case the tax rules have changed since the sales order was taken.

Online Tax Calculation in PeopleSoft Billing

You trigger online tax calculations on the Bill Summary Info page when you click the Calculate Taxes button, if the current PeopleSoft Billing business unit is defined as using an installed third-party tax vendor. When you click Calculate Taxes, the following occurs:

1. PeopleSoft conducts a transaction with the external tax system, either through a web service or a business interlink.
2. The system displays the total tax amount on the Bill Summary Info page.
3. Click the Save button to update the PeopleSoft Billing tables.

   You can view the detailed tax information on the Standard Billing - Line Tax page. The taxes calculated from the Bill Summary page are only temporary and are not logged by the vendor software.

Online Tax Calculations in PeopleSoft Purchasing

You trigger online tax calculations when you:

- Click the Calculate button on the Maintain Purchase Order - Purchase Order page or the Express Purchase Order - Purchase Order page when entering a purchase order or a change order online.
- Click the Calculate SUT button on the Maintain Purchase Order - Sales/Use Tax Information for Schedule page or Express Purchase Order - Sales/Use Tax Information for Schedule page when entering a purchase order or change order online.

See Also

PeopleSoft Enterprise Billing 9.0 PeopleBook, “Entering Bills Online,” Reviewing Bill Summary Information

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, “Creating Purchase Orders Online,” Creating Purchase Order Headers

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, “Creating Purchase Orders Online,” Creating Purchase Order Schedules

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Interacting with Third-Party Tax Vendors During Invoicing

PeopleSoft Billing interacts with third-party tax vendors during pro forma invoicing and invoice finalization. During pro forma invoicing, the system writes nothing to the tax vendor audit or registry files; in finalization, the system logs and reports all transactions.

The Pre-Process and Finalization process (BIIVC000) calls the Tax Interface process (BITAX000) when processing pro formas and invoices in business units defined as using a third-party tax vendor. The following occurs in the Tax Interface process:

1. PeopleSoft conducts transactions with the external tax system, either through a web service or a business interlink.
2. The tax amounts are saved on the PeopleSoft Billing tables.
3. If the third-party tax calculation detects errors, the third-party system returns error codes to PeopleSoft.

   The system tags the bill and writes the error code to the specific line with the tax error.

   In addition, the system enters a line in the message log for the erroneous line.

Note. You can run batch jobs that contain bills requiring both third-party vendor and PeopleSoft tax solution calculations; however, using more than one third-party tax solution is not supported. Only a single third-party vendor solution can be installed for a PeopleSoft database.

Interacting with Third-Party Tax Vendors During the Order Completion Process

The Order Completion process calls third-party tax vendors and provides the necessary information to calculate tax for the order. The values for the taxes are estimates and are stored on the order.

See Also

PeopleSoft Enterprise Order Management 9.0 PeopleBook, "Processing Sales Orders," Understanding Order Entry Required Processing

Viewing Tax Calculation Errors in PeopleSoft Billing

The method that you use to calculate taxes determines how you locate information in PeopleSoft Billing about resulting tax calculation errors.

This section discusses how to:

- View errors when calculating taxes online.
- View errors when calculating taxes through the invoicing process.

Viewing Errors When Calculating Taxes Online

If you calculate taxes online when you click the Calculate Taxes button on the Bill Summary Info page, and errors occur, the system displays a message containing the line with tax calculation errors and a vendor error code.

There are three levels of errors you might receive:

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- Business interlink connectivity errors indicate missing DLLs or shared libraries, or permission errors.

  An error message appears.

- Vendor database connectivity errors indicate trouble connecting to the vendor database.

  An error message appears with a vendor return code.

- Tax calculation errors.

  An error message appears with vendor return codes. The system writes the error message to the bill line tax record and displays the message on the Standard Billing - Line - Tax Info page.

See Also

PeopleSoft Enterprise Billing 9.0 PeopleBook, "Entering Bills Online," Reviewing Bill Summary Information

PeopleSoft Enterprise Billing 9.0 PeopleBook, "Entering Bills Online," Entering Tax Information

Viewing Errors When Calculating Taxes Through the Invoicing Process

If you calculate taxes from invoice pro forma or finalization, the message log reports how many bills that it finds with errors. On the Invoice and Line Errors page, you can view a list of bill lines and the error codes and descriptions associated with them.

Note. Refer to third-party documentation for a complete description of vendor-returned errors.

See Also

PeopleSoft Enterprise Billing 9.0 PeopleBook, "Generating Invoices," Inquiring About Individual Invoice Errors

Reviewing Third-Party Tax Liability Reporting

When using the PeopleSoft-delivered tax solution, you can set up different liability accounting information for each tax authority. When using Taxware or Vertex, however, each PeopleSoft Billing business unit can have only a single distribution code to use in recording general ledger information for taxes. Canadian tax support is the only exception to this rule.

Comparing U.S. and Canadian Tax Support

The following are some differences between the U.S. and Canadian third-party tax solutions support:

Note. Consult your vendor documentation for more information.

- The tax calculation routines calculate provincial sales tax (PST) and goods and services tax (GST) if given valid postal codes.
- For U.S. taxes, you can only use one sales and use tax liability account for each PeopleSoft Billing business unit in an integration with either Taxware and Vertex.

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When you set up a Canadian PeopleSoft Billing business unit, a Billing business unit with a base currency of CAD, an additional distribution field appears that enables you to enter a separate tax liability distribution code for GST. This field appears only when you create a Billing business unit tied to a PeopleSoft General Ledger business unit that uses the Canadian dollar as its base currency.

See Also

Canadian Tax Processing section in the Taxware Technical Reference manual.

Reviewing and Modifying Tax Jurisdiction Level Translation

This section provides an overview of the translation of tax jurisdiction levels provided by third-party tax solutions to PeopleSoft tax authority codes and discusses how to modify the translation map used with Vertex O Series.

Understanding Tax Authority Code Translation

The PeopleSoft system translates the tax jurisdiction levels provided by Vertex Q and O Series, and Taxware Sales and Use Tax into a standard, PeopleSoft code. The PeopleSoft codes include:

- *ST:* State tax.
- *CTY:* City tax.
- *CNY:* County tax.
- *DST:* District tax.
- *SCN:* Secondary county tax.
- *SCI:* Secondary city tax.
- *SDI:* Secondary district tax.
- *GST:* Canadian goods and services tax.
- *PST:* Canadian provincial sales tax.
- *OTH:* Other.

Taxware Enterprise provides the PeopleSoft codes directly; no translation will take place. You can modify the mapping of Vertex O Series tax jurisdiction levels to tax authority codes using the XML Mapper component. You cannot modify the translation of authority codes used with Vertex Q Series or Taxware Sales and Use Tax.

Pages Used to Modify the Vertex O Series Tax Jurisdiction Translation Map

Page Name	Object Name	Navigation	Usage
Define Maps	SAC_MAP_DEFN	SCM Integrations, XML Mapper, Define Maps	Modify the translation of Vertex O Series tax jurisdiction levels to PeopleSoft tax authority codes.

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Modifying the Vertex O Series Tax Jurisdiction Translation Map

Access the XML Mapper page.

1. With the search page, access the difeinition map with for Map ID, *VERTEXO_JURISDICTION*.
2. Click the Map Detail page.
3. Modify the entries in the Static Transformation grid.

   Note. The * character in the External Value column represents unmapped codes coming from Vertex.

4. Click Save.

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CHAPTER 16

Integrating With Vertex O Series

This chapter provides an overview of configuration tasks required to integrate PeopleSoft with the Vertex O Series tax solution and discusses how to:

- Configure Vertex O Series integration.
- Set Up PeopleSoft Installation Options for Vertex O Series.
- Test the Vertex integration.

Understanding PeopleSoft Integration With Vertex O Series

PeopleSoft communicates with the Vertex O Series web service through either the PeopleSoft Integration Broker or the Java Direct XML Post program. To integrate with the Vertex O Series tax solution, you must perform the following configuration steps:

Note. Only setting the connector URLs and setting up business units are required when using the Java Direct XML Post method.

1. Set up your local integration gateway and load the gateway connectors.

   The Integration Broker uses the HTTPTARGET connector to communicate with the Vertex web service.

   This step is not required if you are using the Java Direct XML Post connection method.

   See *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker, "Managing Integration Gateways"*
2. Activate the TAX_INTEGRATION service operation queue.

   This step is not required if you are using the Java Direct XML Post connection method.
3. Activate the service operations and routings.
   - GET_VERTEX_TAXAREA_REQ
   - DO_VERTEX_TAXCALC_REQ

   See Managing Service Operations, *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*

   See Managing Routing Definitions, *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*
4. Activate the PSFT_TAX node.
5. Set Vertex as the Tax Vendor on the PeopleSoft Financials/Supply Chain Installation Options page and set the appropriate Vertex options on the Tax Provider Installation page.

   See Chapter 16, "Integrating With Vertex O Series," Setting Up PeopleSoft Installation Options for Vertex O Series, page 352.

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Note. When you switch from one Tax Vendor Application to another, such as switching from Vertex Q Series to O Series, any geocodes associated with address records in the PeopleSoft database must be upgraded before tax calculations can be sent to the tax vendor software. The Tax Provider Installation page will display the geocode upgrade process status. You should run the process, allow it to complete successfully, or fix any errors that occur, before proceeding.

6. Configure Billing, Order Management, and Purchasing business units to calculate sales and use taxes through the installed tax vendor and set business-unit level tax vendor options.

   See Chapter 15, "Calculating Sales and Use Tax in Supply Chain Management," Setting Up Third-Party Tax Solutions, page 337.

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Updating Geocodes for Locations and Addresses

Configuring Vertex O Series Integration

This section discusses how to:

- Activate the TAX_INTEGRATION service operation queue.
- Activate the service operations.
- Activate the routings.
- Activate the PSFT_TAX node.

Pages Used to Configure Vertex O Series Integration

Page Name	Object Name	Navigation	Usage
Queue Definitions	IB_QUEUEDEFN	PeopleTools, Integration Broker, Integration Setup, Queues	Activate the TAX_INTEGRATION service operation queue.
Service Operation - General	IB_SERVICE	PeopleTools, Integration Broker, Integration Setup, Service Operations	Activate the service operations.
Service Operations - Routings	IB_SERVICETRNGS	PeopleTools, Integration Broker, Integration Setup, Service Operations Click the Routings tab.	Activate the routings.
Node Definitions	IB_NODE	PeopleTools, Integration Broker, Integration Setup, Nodes	Activate tax node.

Activating the TAX_INTEGRATION Service Operation Queue

Access the Queue Definitions page

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For the TAX_INTEGRATION queue, verify that the Queue Status is *Run*.

Activating the Service Operations

Access the Service Operations - General page.

PeopleSoft delivers 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, such as Vertex. To setup a service operation use the information in the table below 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
GET_VERTEX_TAXAREA_REQ	Outbound Synchronous		No	Vertex O Serirs
DO_VERTEX_TAXCALC_REQ	Outbound Synchronous		No	Vertex O Series

See Chapter 3, "Implementing Integrations," Setting Up Service Operations, page 83.

See *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*

Activating the Routings

Access the Service Operations - Routings page.

Activate the *DO_VERTEX_TAXCALC_REQ_TAX* and the *GET_VERTEX_TAXAREA_REQ_TAX* routings for the *PSFT_TAX* node.

- For the *DO_VERTEX_TAXCALC_REQ_TAX* routing, set the PrimaryURL property to the endpoint of the Vertex tax calculation request function.

  Typically this will be: `http://HOST:PORT/vertex-ws/services/CalculateTaxDoc`. Replace *HOST:PORT* with the address of the Vertex web service.

- For the *GET_VERTEX_TAXAREA_REQ_TAX* routing, set the PrimaryURL property to the endpoint of the Vertex tax area request function.

  Typically this will be: `http://HOST:PORT/vertex-ws/services/LookupTaxAreasDoc`. Replace *HOST:PORT* with the address of the Vertex web service.

See Manage Routing Definitions, *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*

Activating the PSFT_TAX Node

Access the Node Definitions page. Verify that the PSFT_TAX node is active.

See Adding and Configuring Nodes, *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*

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Setting Up PeopleSoft Installation Options for Vertex O Series

The Set Up Financials/Supply Chain, Install, Tax Provider Installation page provides the following options for Vertex O Series:

Note. To display options for Vertex O Series, *Vertex* must be chosen as the Tax Vendor on the Overall Installation Options page and *Vertex O Series* as the Vertex Tax Application on the Tax Provider Installation page.

Tax Vendor Call Options Determines whether tax calculation transactions are sent to Vertex line by line or as an entire document. The options are:

- *Doc Level:* an entire invoice or document is sent to Vertex for tax calculation.
- *Line Level:* tax calculation transactions are sent to Vertex line by line.

The *Doc Level* option allows you to take advantage of invoice and multiline maximum tax rules in some jurisdictions, but when you choose the Doc Level option, returns and credits must be carried out by issuing a full credit and rebill. Choosing the document level option will also provide faster tax transaction processing in most situations since fewer messages are exchanged with the Vertex tax software.

The *Line Level* option allows more flexibility when issuing credits and returns, but prevents you from taking advantage of maximum tax rules at the invoice or multiline level. This option should be chosen when it is not an acceptable practice to issue a full invoice credit and rebill when an individual line must be credited.

Tax Vendor Call – Payables Select how tax calculation transactions from the Accounts Payable application are sent to Vertex. Transactions from Purchasing are always sent line by line, regardless of the value in this field.

Tax Vendor Call – Sales Select how tax calculation transactions from the Billing application are sent to Vertex. Transactions from Order Management that are fully paid at sales order entry time also use this value; otherwise, they will always be sent line by line.

Tax Vendor Upgrade Status Displays the status of the process run when the tax vendor application is changed. The process updates the geocodes associated with addresses in PeopleSoft.

Tax Vendor Deployment Option *Web Service* is currently the only option.

Connection Method Select the method used to exchange messages with the Vertex O series web service:

- Integration Broker – use the PeopleSoft Integration Broker.
- Java Direct XML Post – use the high-throughput Java utility.

Message Node Name Set to the node setup for the exchange of messages between the PeopleSoft Integration Broker and the Vertex O Series web service. By default, the node to use is *PSFT_TAX*.

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Tax Exemption Override Allowed	Select to allow tax exempt transactions to be sent from PeopleSoft to Vertex. If tax exemption overrides are not allowed, exemptions must be maintained within the Vertex application.
User Name	Enter the account name used to access the Vertex O Series web service.
Password	Enter the password for the account used to access the Vertex O Series web service.

Testing the Vertex O Series Integration

To test the Vertex O Series integration, click the Test Tax Install button on the Tax Provider Installation page. The system will send a test transaction to Vertex and should report a Geocode and nonzero tax amount. If an error message appears or the tax amount is zero, then there is a problem with the tax installation that must be corrected.

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CHAPTER 17

Integrating With Vertex Q Series

This chapter provides an overview of the PeopleSoft Business Interlinks used to integrate with the Vertex Q Series application and discusses how to:

- Identify Vertex plug-in locations.
- Identify Vertex dll and shared library locations.
- Set up variables for the Vertex database location.
- Set up PeopleSoft installation options for Vertex Q Series.
- Test the Vertex installation.
- Troubleshoot installation errors.

See Also

Part 9, "Integrating with Sales and Use Tax Applications," page 333

Vertex SoftLink Supplement to the C Programmer's Guide for use with PeopleSoft

Understanding PeopleSoft Business Interlinks to Vertex Q Series

PeopleSoft delivers two business interlink objects to interact with Vertex for both online and batch transactions: VERTEX_CALCTAX and VERTEX_GEOCODES. The business interlink objects communicate with Vertex Q Series through an interlink plug-in provided by Vertex. The interlink plug-in file name is `psbivrtx.dll` and it must be installed in the interface drivers directory.

UNIX Environments

In UNIX environments, the business interlink algorithmically converts the file name format from that of a Windows DLL to that of a UNIX shared library or shared object. The business interlink adds the prefix *lib* to the name, and replaces the extension, *DLL*, with the appropriate extension for the current UNIX platform.

For example, the business interlink changes the file name `psbivrtx.dll` to `libpsbivrtx.sl` before each call to the interlink plug-in.

See Also

http://www.peoplesoft.com/corp/en/products/dev_integration_portals/isr/index.jsp

Enterprise PeopleTools 8.48 PeopleBook: PeopleCode API Reference

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Identifying Vertex Q Series Plug-in Locations

By default, the PeopleSoft system searches for the interlink plug-in in the interface drivers directory, as described in the following table:

Location	Mode
<PS_HOME>\bin\client\winx86\interfacedrivers	For two-tier testing on Windows.
<PS_HOME>\bin\server\winx86\interfacedrivers	For Windows application server and PeopleSoft Process Scheduler server.
<PS_HOME>/bin/interfacedrivers	For UNIX application server and PeopleSoft Process Scheduler server.

These directories also contain the XML script files that describe the interlink plug-in structure which were used to create the delivered business interlink objects in the PeopleSoft system. The XML script files have the same name as the Windows DLL plug-in, except that the .XML extension is used instead of the .DLL extension.

When you purchase the Vertex software, Vertex provides an interlink plug-in that you must place in these directories. The copy under the Windows directory <PS_HOME>\bin\client\winx86\InterfaceDrivers is not used in production. The PeopleSoft Process Scheduler server and the application server use the plug-in copy in <PS_HOME>\bin\server\winx86\InterfaceDrivers on Windows, or <PS_HOME>/bin/interfacedrivers on UNIX.

Application Server Configurations

The application server configuration file has the following entry, which you can use to change the plug-in default location:

```
[PSTOOLS]
;*****************************************************************
; General settings for PSTOOLS
;*****************************************************************
;Uncomment this to specify an alternate directory to search for Interface Drivers.
;Business Interlink Driver Directory=
```

Process Scheduler Configurations

The PeopleSoft Process Scheduler configuration file contains the following entry, which you can use to change the plug-in default location:

```
;-----------------------------------------------------------------------
;Uncomment to specify an alternate directory to search for Interface Drivers.
;Business Interlink Driver Directory=
```

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Identifying Vertex Q Series DLLs and Shared Library Locations

Vertex-supplied DLLs or shared libraries can be placed in the following locations:

Note. Refer to the Vertex documentation for more information.

Windows NT

Typically, the Vertex DLLs should be placed in the same directory as the PeopleSoft main executable file:

Location	Mode
`<PS_HOME>\bin\client\winx86`	For two-tier testing on Windows.
`<PS_HOME>\bin\server\winx86`	For Windows application server and PeopleSoft Process Scheduler server.

UNIX

Typically, the Vertex shared libraries should be placed in the same directory with the other PeopleSoft libraries. This directory is `<PS_HOME>/bin`. It is usually one of the directories pointed to by the `LIBPATH` environment variable set up in the `psconfig.sh` UNIX shell script.

If the system cannot find either the plug-in DLL/shared library or Vertex DLLs/shared libraries, an interlink connectivity error appears.

Setting Up Variables for the Vertex Database Location

This section discusses how to:

- Set up Vertex on a Microsoft Windows NT or Windows 2000 platform.
- Set up Vertex on a UNIX platform.

Setting Up Vertex on a Microsoft Windows NT or Windows 2000 Platform

Vertex provides a registry file to populate entries in the Microsoft Windows NT or Windows 2000 registry. A typical file contains the following entries:

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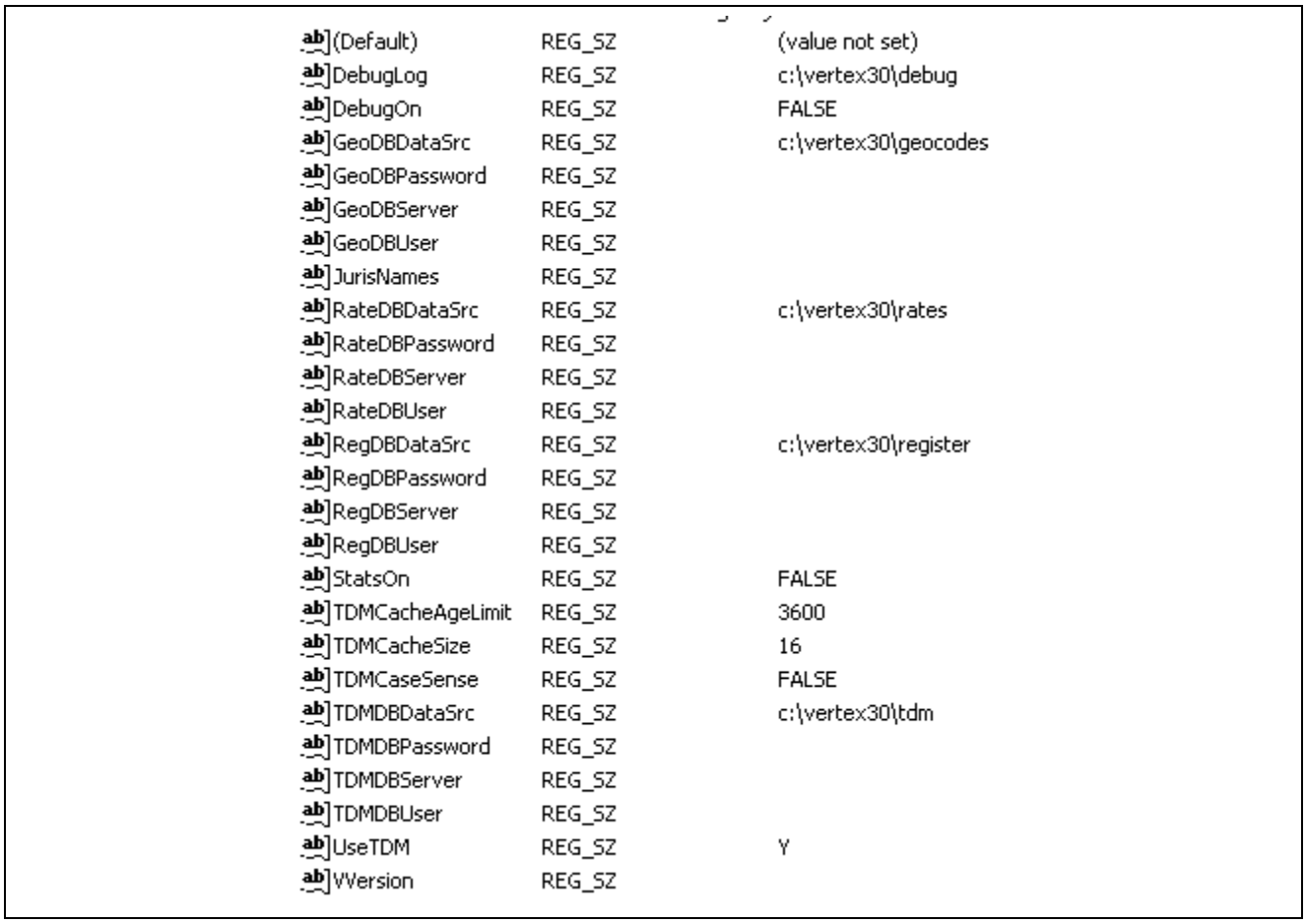

(Default)	REG_SZ	(value not set)
DebugLog	REG_SZ	c:\vertex30\debug
DebugOn	REG_SZ	FALSE
GeoDBDataSrc	REG_SZ	c:\vertex30\geocodes
GeoDBPassword	REG_SZ	
GeoDBServer	REG_SZ	
GeoDBUser	REG_SZ	
JurisNames	REG_SZ	
RateDBDataSrc	REG_SZ	c:\vertex30\rates
RateDBPassword	REG_SZ	
RateDBServer	REG_SZ	
RateDBUser	REG_SZ	
RegDBDataSrc	REG_SZ	c:\vertex30\register
RegDBPassword	REG_SZ	
RegDBServer	REG_SZ	
RegDBUser	REG_SZ	
StatsOn	REG_SZ	FALSE
TDMCacheAgeLimit	REG_SZ	3600
TDMCacheSize	REG_SZ	16
TDMCaseSense	REG_SZ	FALSE
TDMDBDataSrc	REG_SZ	c:\vertex30\tdm
TDMDBPassword	REG_SZ	
TDMDBServer	REG_SZ	
TDMDBUser	REG_SZ	
UseTDM	REG_SZ	Y
VVersion	REG_SZ	

Vertex registry file

For a Vertex ISAM database, provide values for xxxDBDataSrc. The value would be the directory containing the Vertex database. For relational database connection, the typical setup is to provide values for xxxDBServer, xxxDBPassword, and xxxDBUser, as follows:

```
RateDBDataSrc=
RateDBServer=qsu
RateDBPassword=solaris25
RateDBUser=solaris25
GeoDBDataSrc=
GeoDBServer=qsu
GeoDBUser=solaris25
GeoDBPassword=solaris25
RegDBDataSrc=
RegDBServer=qsu
RegDBUser=solaris25
RegDBPassword=solaris25
TDMDataSrc=
TDMDBServer=qsu
TDMDBUser=solaris25
TDMDBPassword=solaris25
```

There should be no blanks between the equal sign and the parameter entered.

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See the Vertex Softlink documentation for additional information.

Setting Up Vertex on a UNIX Platform

Vertex provides a configuration file called PSVTXCFG that contains similar entries to the ones in a Microsoft Windows registry. This file must be accessible to the Vertex-supplied shared libraries. Define an environment variable called PSVTXCFG in psconfig.sh, and assign it the location of the configuration file. Define the variable for both the application server and PeopleSoft Process Scheduler so that the variable can be used by the Vertex software.

Setting Up PeopleSoft Installation Options for Vertex Q Series

The Set Up Financials/Supply Chain, Install, Tax Provider Installation page provides one option for Vertex Q Series: Using TDM. Although PeopleSoft applications as delivered do not currently support this option, it is included in case you want to configure it to work with your business processes. Set up the Using TDM (using Tax Decision Maker) option in your Vertex environment settings. Use of TDM is set up in the Vertex registry on a Windows NT platform and in PSVTXCFG.SH on a UNIX platform.

Note. To display options for Vertex Q Series, *Vertex* must be chosen as the Tax Vendor on the Overall Installation Options page and *Vertex Q Series* as the Vertex Tax Application on the Tax Provider Installation page.

Testing the Vertex Q Series Installation

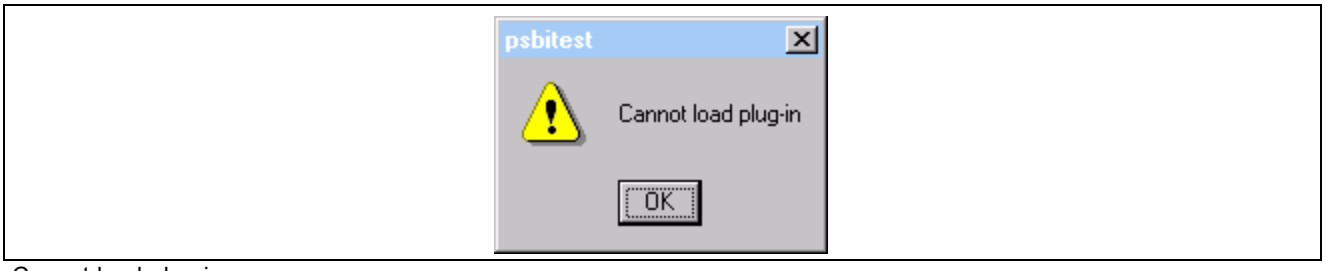
To test the Vertex Q Series installation, click the Test Tax Install button on the Tax Provider Installation page. The system will send a test transaction to Vertex and should report a Geocode and nonzero tax amount. If an error message appears or the tax amount is zero, then there is a problem with the tax installation that must be corrected.

Troubleshooting Installation Errors

The sections discuss error messages that you may receive and suggestions for resolving the errors. For batch processing, similar error messages are placed in the message log of each failed process.

Two-Tier Testing, Interlink Tester With Plug-in or Vertex DLLs Not Accessible

This message appears:



Cannot load plug-in error message

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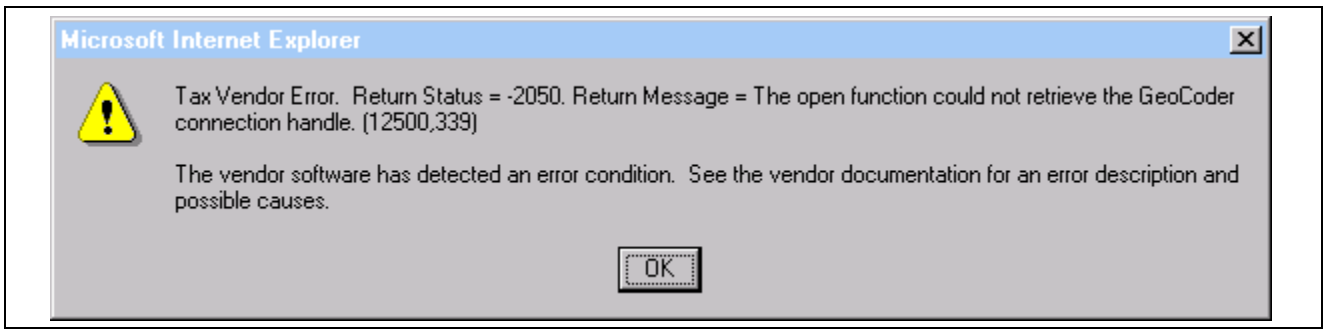
Check the client directories to ensure the plug-in and the Vertex DLLs are in the correct directories. Check the Vertex documentation for a complete list of required DLLs. This error may also be related to changes that you make to the Configuration Manager to change the location of the default interlink directory.

Three-Tier Geocode Look-Up With the Interlink Plug-in Not Accessible

Check the directories on the computer running the application server and ensure that the plug-in and the Vertex DLLs are in the correct directories. Check the Vertex documentation for a complete list of required DLLs. This error may also be related to changes that you make to the Configuration Manager to change the location of the default interlink directory. Also check permissions of the plug-in and Vertex shared libraries.

Three-Tier Where the Vertex Open Fails on Geocode Look-Up

This error message appears when the Vertex software detects invalid Vertex database pointers, permissions issues or other open failures:



Vertex error message

Check the Microsoft Windows registry or Vertex UNIX configuration file PSVTXCFG to ensure entries are pointing to the correct locations. For a UNIX installation, ensure that the variable PSVTXCFG is defined in psconfig.sh, pointing to the directory that contains the PSVTXCFG file. Additionally, check for permissions problems.

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CHAPTER 18

Integrating With Taxware Enterprise

This chapter provides an overview of configuration tasks required to integrate PeopleSoft with the Taxware Enterprise tax solution and discusses how to:

- Configure Taxware Enterprise integration.
- Set Up PeopleSoft Installation Options for Taxware Enterprise.
- Test the Taxware integration.

Understanding PeopleSoft Integration With Taxware Enterprise

PeopleSoft communicates with Taxware Enterprise through the PeopleSoft Integration Broker. To integrate with the Taxware Enterprise tax solution, you must perform the following configuration steps:

1. Set up your local integration gateway and load the gateway connectors.

   The Integration Broker uses the HTTPTARGET connector to communicate with Taxware Enterprise.

   See *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker, "Managing Integration Gateways"*
2. Activate the TAX_INTEGRATION service operation queue.
3. Activate the service operations and routings:
   - GET_GEOCODE_REQ
   - DO_TAXCALC_REQ

   See Managing Service Operations, *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*

   See Managing Routing Definitions, *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*
4. Activate the PSFT_TAX node.
5. Set Taxware as the Tax Vendor on the PeopleSoft Financials/Supply Chain Installation Options page and set the appropriate Taxware Enterprise options on the Tax Provider Installation page.

   See Chapter 18, "Integrating With Taxware Enterprise," Setting Up PeopleSoft Installation Options for Taxware Enterprise, page 363.

Note. When you switch from one Tax Vendor Application to another, such as switching from Taxware Sales and Use Tax to Taxware Enterprise, any geocodes associated with address records in the PeopleSoft database must be upgraded before tax calculations can be sent to the tax vendor software. The Tax Provider Installation page will display the geocode upgrade process status. You should run the process, allow it to complete successfully, or fix any errors that occur, before proceeding.

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6. Configure Billing, Order Management, and Purchasing business units to calculate sales and use taxes through a tax vendor and set business-unit level tax vendor options.

   See Chapter 15, "Calculating Sales and Use Tax in Supply Chain Management," Setting Up Third-Party Tax Solutions, page 337.

Configuring Taxware Enterprise Integration

This section discusses how to:

- Activate the TAX_INTEGRATION service operation queue.
- Activate the service operations.
- Activate the routings.
- Activate the PSFT_TAX node.

Pages Used to Configure Taxware Enterprise Integration

Page Name	Object Name	Navigation	Usage
Queue Definitions	IB_QUEUEDEFN	PeopleTools, Integration Broker, Integration Setup, Queues	Activate the TAX_INTEGRTION service operation queue.
Service Operation - General	IB_SERVICE	PeopleTools, Integration Broker, Integration Setup, Service Operations	Activate the service operations.
Service Operations - Routings	IB_SERVICETRNGS	PeopleTools, Integration Broker, Integration Setup, Service Operations Click the Routings tab.	Activate the routings.
Node Definitions	IB_NODE	PeopleTools, Integration Broker, Integration Setup, Nodes	Activate tax node .

Activating the TAX_INTEGRATION Service Operation Queue

Access the Queue Definitions page.

For the TAX_INTEGRATION queue, verify that Queue Status is *Run*.

Activate the Service Operations

Access the Service Operations - General page.

PeopleSoft delivers 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, such as Taxware. To setup a service operation use the information in the table below and refer to the setup instruction in the PeopleSoft Supply Chain Management Integrations 9.0 PeopleBook, "Implementing Integrations" chapter, Setting Up Service Operations section.

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Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
GET_GEOCODE_REQ	Outbound Synchronous		No	third-party system, for example Taxware Enterprise
DO_TAXCALC_REQ	Outbound Synchronous		No	third-party system, for example Taxware Enterprise

See Chapter 3, "Implementing Integrations," Setting Up Service Operations, page 83.

See *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*

Activating the Routings

Activate the Service Operations - Routings page.

Activate the DO_TAXCALC_REQ and the GET_GEOCODE_REQ routings for the PSFT_TAX node.

- For the DO_TAXCALC_REQ routing, set the Value field of the PrimaryURL property to the endpoint of the tax software's tax calculation request function.

  Typically this will be: `http://HOST:PORT/taxwareServlet/servlet/TaxwareAdapter`. Replace *HOST:PORT* with the address of the Taxware Enterprise adapter.

- For the GET_GEOCODE_REQ routing, set the Value field of the PrimaryURL property to the endpoint of the tax software's geocode request function.

  Typically this will be: `http://HOST:PORT/taxwareServlet/servlet/TaxwareAdapter`. Replace *HOST:PORT* with the address of the Taxware Enterprise adapter.

See Manage Routing Definitions, *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*

Activating the PSFT_TAX Node

Access the Node Definitions page. Verify that the PSFT_TAX node is active.

See Adding and Configuring Nodes, *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*

Setting Up PeopleSoft Installation Options for Taxware Enterprise

The Set Up Financials/Supply Chain, Install, Tax Provider Installation page provides the following options for Taxware Enterprise:

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Note. To display options for Taxware Enterprise, *Taxware* must be chosen as the Tax Vendor on the Overall Installation Options page and *Taxware Enterprise* as the Taxware Tax Application on the Tax Provider Installation page.

Tax Vendor Call Options Select whether taxes rules will be applied to individual lines or to an entire invoice. The options are:

- *Doc Level:* apply tax rules to entire invoices.
- *Line Level:* apply tax rules line-by-line.

The *Doc Level* option allows you to take advantage of invoice and multiline maximum tax rules in some jurisdictions, but when you choose the Doc Level option, returns and credits must be carried out by issuing a full invoice credit and rebill.

The *Line Level* option allows more flexibility when issuing credits and returns, but prevents you from taking advantage of maximum tax rules at the invoice or multiline level. This option should be chosen when it is not an acceptable practice to issue a full invoice credit and rebill when an individual line must be credited.

Tax Vendor Call – Payables Select how tax rules are applied when sales and use tax liabilities are calculated in the Accounts Payable application. Tax rules on transactions from Purchasing are always applied line by line, regardless of the value in this field.

Tax Vendor Call – Sales Select how tax calculation transactions from the Billing application are sent to Taxware. Transactions from Order Management that are fully paid at sales order entry time also use this value; otherwise, they will always be sent line by line.

Tax Vendor Upgrade Status Displays the status of the process run when the tax vendor application is changed. The process updates the geocodes associated with addresses in PeopleSoft.

Message Node Name Set to the node setup for the exchange of messages between the PeopleSoft Integration Broker and Taxware Enterprise. Typically, the node name is *PSFT_TAX*.

Tax Exemption Override Allowed Allows tax exemption certificates to be maintained in PeopleSoft. If tax exemption overrides are not allowed, exemptions must be maintained within the Taxware application.

Testing the Taxware Enterprise Integration

To test the Taxware Enterprise integration, click the Test Tax Install button on the Tax Provider Installation page. Enter the organization code defined in Taxware Enterprise in the box that appears. The system will send a test transaction to Taxware and should report a Geocode and nonzero tax amount. If an error message appears or the tax amount is zero, then there is a problem with the tax installation that must be corrected.

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CHAPTER 19

Integrating with Taxware Sales and Use Tax

This chapter provides an overview of the PeopleSoft Business Interlinks used to integrate with the Taxware Sales and Use Tax application and discusses how to:

- Identify Taxware plug-in locations.
- Identify Taxware dll and shared library locations.
- Set up variables for the Taxware database location.
- Set up PeopleSoft installation options for Taxware Sales and Use Tax.
- Test the Taxware installation.
- Troubleshoot installation errors.

See Also

Part 9, "Integrating with Sales and Use Tax Applications," page 333

Taxware Sales/Use Tax, STEP and VeraZip® Systems PeopleSoft Link Installation Notes

Taxware Universal Tax Link Technical Reference Manual

Understanding PeopleSoft Business Interlinks to Taxware Sales and Use Tax

PeopleSoft delivers two business interlink objects to interact with Taxware for both online and batch transactions: TAXWARE_CALCTAX and TAXWARE_GEOCODES. The business interlink objects communicate with Taxware Sales and Use Tax Series through an interlink plug-in provided by Taxware. The interlink plug-in file name is `pstwlink.dll` and it must be installed in the interface drivers directory.

UNIX Environments

In UNIX environments, the business interlink algorithmically converts the file name format from that of a Windows DLL to that of a UNIX shared library or shared object. The business interlink adds the prefix *lib* to the name, and replaces the extension, *DLL*, with the appropriate extension for the current UNIX platform.

For example, the business interlink changes the file name `pstwlink.dll` to `libpstwlink.sl` before each call to the interlink plug-in.

See Also

http://www.peoplesoft.com/corp/en/products/dev_integration_portals/isr/index.jsp

Enterprise PeopleTools 8.48 PeopleBook: PeopleCode API Reference

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Identifying Taxware Plug-in Locations

By default, the PeopleSoft system searches for the interlink plug-in in the interface drivers directory, as described in the following table:

Location	Mode
<PS_HOME>\bin\client\winx86\interfacedrivers	For two-tier testing on Windows.
<PS_HOME>\bin\server\winx86\interfacedrivers	For Windows application server and PeopleSoft Process Scheduler server.
<PS_HOME>/bin/interfacedrivers	For UNIX application server and PeopleSoft Process Scheduler server.

These directories also contain the XML script files that describe the interlink plug-in structure which were used to create the delivered business interlink objects in the PeopleSoft system. The XML script files have the same name as the Windows DLL plug-in, except that the .XML extension is used instead of the .DLL extension.

When you purchase the Taxware software, Taxware provides the interlink plug-in that you must place in these directories. The copy under the Windows directory <PS_HOME>\bin\client\winx86\InterfaceDrivers is not used in production. The PeopleSoft Process Scheduler server and the application server use the plug-in copy in <PS_HOME>\bin\server\winx86\InterfaceDrivers on Windows, or <PS_HOME>/bin/interfacedrivers on UNIX.

Application Server Configurations

The application server configuration file has the following entry, which you can use to change the plug-in default location:

```
[PSTOOLS]
;*****************************************************************
; General settings for PSTOOLS
;*****************************************************************
;Uncomment this to specify an alternate directory to search for Interface Drivers.
;Business Interlink Driver Directory=
```

Process Scheduler Configurations

The PeopleSoft Process Scheduler configuration file contains the following entry, which you can use to change the plug-in default location:

```
;------------------------------------------------------------------------
;Uncomment to specify an alternate directory to search for Interface Drivers.
;Business Interlink Driver Directory=
```

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Identifying Taxware DLLs and Shared Library Locations

Taxware-supplied DLLs or shared libraries can be placed in the following locations:

Note. Refer to the Taxware documentation for more information.

Windows NT

Typically, the Taxware DLLs should be placed in the same directory as the PeopleSoft main executable file:

Location	Mode
<PS_HOME>\bin\client\winx86	For two-tier testing on Windows.
<PS_HOME>\bin\server\winx86	For Windows application server and PeopleSoft Process Scheduler server.

UNIX

Typically, the Taxware shared libraries should be placed in the same directory with the other PeopleSoft libraries. This directory is <PS_HOME>/bin. It is usually one of the directories pointed to by the LIBPATH environment variable set up in the psconfig.sh UNIX shell script.

If the system cannot find either the plug-in DLL/shared library or Taxware supplied DLL/shared library, an interlink connectivity error appears.

Setting Up Variables for the Taxware Database Location

This section discusses how to:

- Set up Taxware on a Microsoft Windows NT or Windows 2000 platform.
- Set up Taxware on a UNIX platform.

Setting Up Taxware on a Microsoft Windows NT or Windows 2000 Platform

Taxware provides three INI files that you need to set up to point to the location of the Taxware database directories:

- AVPTAX.INI
- AVPSTEP.INI
- AVPZIP.INI

Place all three files in the WINNT directory. Each file contains a set of pointer variables that you should point to the location where the Taxware database files were placed during Taxware software installation.

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Note. Taxware opens the database files in read/write mode, even when only reading from them. You may encounter problems with permissions.

Setting Up Taxware on a UNIX Platform

You must set up several environment variables with the location of the Taxware database files. Taxware provides a script called `ENVARS` that contains all the variables that need to be defined. In `ENVARS`, provide values for these variables, and then run the ENVARS script when starting the application server and PeopleSoft Process Scheduler. A typical place to run the `ENVARS` script is in `psconfig.sh`.

Note. Taxware opens the database files in read/write mode. Consequently, you may encounter problems with permissions.

Setting Up PeopleSoft Installation Options for Taxware Sales and Use Tax

The Set Up Financials/Supply Chain, Install, Tax Provider Installation page provides the following options for Taxware Sales and Use Tax:

Note. To display these options, *Taxware* must be chosen as the Tax Vendor on the Overall Installation Options page and *Taxware Sales and Use Tax* as the Taxware Tax Application on the Tax Provider Installation page.

Using STEP Select this option if you use the Taxware STEP module.

Reason Code Matching Select one of two options to determine how you want to handle tax certificate entry reason lookup in STEP.

Only Exact Reason Code Match: This is the more restrictive option. Taxware finds only tax certificates that were entered with the exact reason code you set up on the bill line. If you select this option, you must add the Taxware reason codes as translate values for the field TAX_EXEMPT_RC. Only add those reason codes you expect to be sent to PeopleSoft.

Use Default Record: Taxware looks for an exact match. If it doesn't find one, it uses a default tax certificate for exemption.

Certificate Level Enter an option that determines which taxing jurisdiction level tax certificates apply.

Selecting *Individual Certificate Levels* enables STEP to look for certificates at all individual levels and exempt tax only for those levels at which a certificate is found.

Selecting *State Level Only* prompts STEP to look for certificates at the state level only.

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Testing the Taxware Sales and Use Tax Installation

To test the Taxware Sales and Use Tax installation, click the Test Tax Install button on the Tax Provider Installation page. The system will send a test transaction to Taxware and should report a Geocode and nonzero tax amount. If an error message appears or the tax amount is zero, then there is a problem with the tax installation that must be corrected.

Troubleshooting Installation Errors

The sections discuss error messages that you may receive and suggestions for resolving the errors. For batch processing, similar error messages are placed in the message log of each failed process.

Two-Tier Testing, Interlink Tester With Plug-in or Vendor DLL Not Accessible

This message appears:

Cannot load plug-in error message

Check the client directories to ensure the plug-in and the Taxware DLLs are in the correct directories. Check the Taxware documentation for a complete list of required DLLs. This error may also be related to changes that you make to the Configuration Manager to change the location of the default interlink directory.

Three-Tier Geocode Look-up With the Interlink Plug-in Not Accessible

Check the directories on the computer running the application server and ensure that the plug-in and the Taxware DLLs are in the correct directories. Check the Taxware documentation for a complete list of required DLLs. This error may also be related to changes that you make to the Configuration Manager to change the location of the default interlink directory. Also check permissions of the plug-in and vendor DLLs.

Three-Tier Where the Taxware Open Fails on Geocode Look-up

This error message appears when the Taxware software detects invalid database pointers, permissions issues or other open failures:

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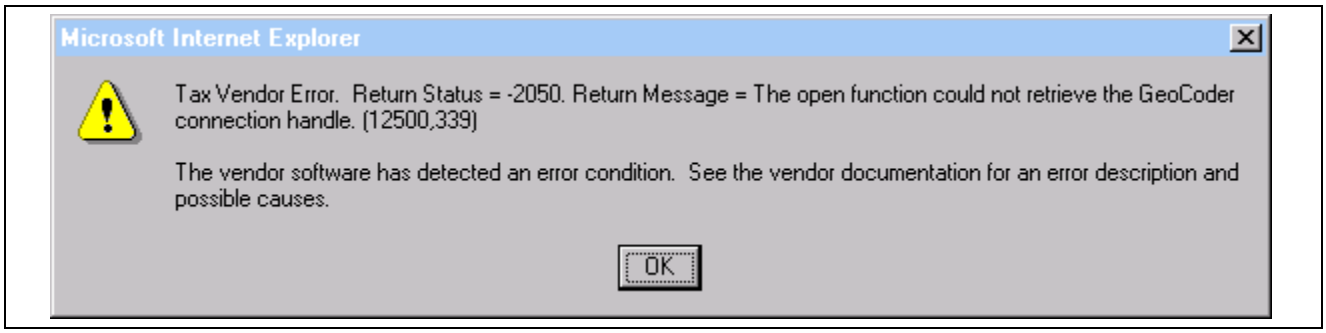

Tax vendor error message

Check the INI files or UNIX psconfig.sh environment variables to ensure that entries are pointing to the correct locations. Additionally, you should check for permissions problems.

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Glossary of PeopleSoft Enterprise Terms

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

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Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account A feature in PeopleSoft Enterprise General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

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

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budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business process A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business unit constraints In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

buy event In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction.For bidders, the sale of goods or services.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

cash drawer A repository for monies and payments taken locally.

catalog item In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

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catalog partner In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

claimback In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

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

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

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

See also *population* and *division*.

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

collection rule In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

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

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

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

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

constraint A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

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

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

In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

direct receipt Items shipped from a warehouse or vendor to another warehouse.

direct ship Items shipped from the vendor or warehouse directly to the customer (formerly referred to as *drop ship*).

directory information tree In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

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

See also *population* and *cohort*.

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

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

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

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elimination set In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.

event constraints In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.

event propagation process In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

financial sanctions For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment.

For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

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fund In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

generic process type In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GDS Abbreviation for *Global Distribution System.* Broad-based term to describe all computer reservation systems for making travel plans.

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

See also *business unit.*

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

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

global constraints In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.

group In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.

ideal response In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.

incentive object In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.

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incentive rule In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

itinerary In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as *pending reservations.* Reservations that have been paid for are referred to as *confirmed reservations.*

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

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keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

KVI Abbreviation for *Known Value Item.* Term used for products or groups of products where the selling price cannot be reduced or increased.

landlord In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft Enterprise data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

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

lease In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.

lease abstract In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

line In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine.*

match group In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

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

merchandising activity In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

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meta-SQL Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

NDP Abbreviation for *Non-Discountable Products.* Term used for products or groups of products where the selling price cannot be decreased.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

Optimization Engine A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.

pagelet Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.

participant In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object Each participant object may be related to one or more compensation objects.

See also *compensation object.*

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

payment shuffle In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

pending item In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

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PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.

PeopleCode event See *event.*

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

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

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

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

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

phase A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.

pickup quantity The product quantity that the customer is taking with them from the counter sales environment.

plan In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan template In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

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

planning instance In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and

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

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process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.

product adds The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as *giveaways*).

product bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.

product line The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

proxy bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

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

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

reference data In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.

reference object In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data Data that is extracted from a separate database and migrated into the local database.

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REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reservations In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

RFI event In PeopleSoft Strategic Sourcing, a request for information.

RFx event In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.

role Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

run control A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

saved bid In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.

score In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

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section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

sell event In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.

serial genealogy In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

short-term customer A customer not in the system who is entered during sales order entry using a template.

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single signon With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

sourcing objective For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).

speed key See *communication key.*

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

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

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

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

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

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summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

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

system function In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

task A deliverable item on the detailed sourcing plan.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

tenant In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.

territory In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

third party A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.

tiered pricing Enables different portions of a schedule to be priced differently from one another.

time span A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.

total cost In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

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travel group In PeopleSoft Expenses, the organization's travel rules and polices that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.

travel partner In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.

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

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

trace usage In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.

Translate table A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

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

universal navigation header Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

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

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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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Index

Numerics/Symbols

810
  example 172
850
  example 113, 142
855
  example 128
856
  example 156

A

Add Nodes to ChunkRule page 89
additional documentation xviii
addresses, for sales and tax solutions 341
Advanced Shipping Notice (856)
  example 156
application fundamentals xvii
Auto Numbering component 292
Auto Numbering page 292
AUTO_NUM_PNL 292

B

Backbone Interlink process, running 109
Backbone Interlinks, processing 109
BackBone InterlinX
  integrations 93
  overview 91
  prerequisites 92
  setting up 91
background transaction processes 237
BankBone InterlinX - Process Request page 109
Bar Code Transaction Setup component (BCT_SETUP_FS) 90
Batch Publish Rules page 87
BBIX User Exit Processing page 93
BCT_LABEL_FS 230
BCT_MFGID_SETUP 231
BCT_SETUP_FS component 90
Billing Invoice (810)
  example 172
BU/Location Node Mapping page 90
BU/Par Location Node Mapping page 90
business interlinks, Taxware Sales and Use Tax 365
business interlinks, Vertex Q Series 355
business process, order-to-cash 194
BusUnit Mapping page 89

C

carrier and shipping method data, understanding 207
Carrier page 292
case carts 222
changes, order 198
chunking
  setting up 88
comments, submitting xxii
common elements xxii, xxv
Completion Label - Completion Labels page 243
Completion Label - Production Select page 243
completion labels, printing 245
contact information xxii
CRM EIPs
  inbound 305
  list 307
  outbound 305
  setting up 305
  using 307
cross-references xxi
Customer Connection website xviii
customer data, understanding 207
Customer ID Chunk page 90

D

Data Collection Label Setup component 230
Data Collection Label Setup page 230
data collection labels
  completion 245
  item storage 248
  kanban card 246
  pull tickets 246
  shipping carton 249
  shipping container 252
  shipping serial 252
  storage container 249
  storage location 247

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data collection labels, setting up 230
Data Collection Setup page 90
data collection system, record layouts for 255
data collection transactions, using 235
data collection, understanding 233
Data Definition Maintenance page 103, 104
data definition maintenance, using 104
defaults, electronic data collection 230
Define Map page 97
Define Map Sets page 97, 100
Define Maps page 97, 347
Define Node Associations page 97, 101
Define Target Set page 93
Define Target Sets page 93
definitions, picking plan extract file record 275
documentation
printed xviii
related xviii
updates xviii

E

EIP
implementing 83
setting up 83
EIPs, overview 9
electronic data collection defaults, setting up 90, 230
electronic data collection definitions, label extract file formats 261
electronic data collection system
designing 229
selecting devices 234
understanding 233
using 233
electronic data collection, understanding 229
Enterprise Components
setup for EIP 86
enterprise integration points
documentation 3
documentation functional and technical implementers 4
documentation power users and managers 4
enterprise integration points (EIPs), understanding 191
error correction, transportation management system 300
errors, tax calculation 345
examples
EIP 111
Export data to SCBM page 327
exporting data, supply chain business modeler 326
extract file format
definitions 261
inventory picking 276
item storage labels 262
item usage labels 272
Kanban Card labels 273
manufacturing picking 280
production completion labels 270
pull ticket labels 273
shipping carton labels 264
shipping container labels 268
shipping serial labels 270
storage container labels 263
storage location labels 262, 263
extract file record
definitions, picking plan 275

F

fields, common descriptions xxv
file formats
par location count 255
physical accounting 255
File Inbound page 87
files, managing 240
four-wall warehousing
understanding 204
WMS integration 204
Full Data Publish Rules page 87

G

geocodes 340
associating with customer address 341
billing interaction with third-party vendors 343
understanding 340
glossary 371

I

Import data from SCBM page 330
importing data, supply chain business modeler 330

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inbound EIPs
architecture overview 9
overview 9
processing 103
inbound transactions
data definition maintenance 104
purging 107
transaction maintenance 103
Integrating with a Third-Party Point-of-Use Supplier System, overview 211
Integration Broker setup 83
Integration Definition page 93
integration implementation 6
integration information flow 3
integration issues, warehouse management systems 189
Integration with a third-party surgical resource software application
overview 219
integration, system-wide-assumptions 189
Internal Location Expected Receipt EIP (outbound)
use in POU 216
inventory adjustments, understanding 204
inventory picking, extract file format 276
inventory status updates, storage location transfers 205
item data, understanding 207
item replenishment
data for SRS 223
in POU 214
Item Storage Label page 244
item storage labels
extract file format 262
printing 248
Item Usage Label page 244
item usage labels, extract file format 272
items
defining for POU 212
defining for SRS integration 220

K

Kanban Card labels
extract file format 273
printing 246
selecting the print range 247
Kanban Card Range page 244
Kanban Card, selecting the label range 247

L

label extract file, definitions 261
labels
generating 239
setting up 230
list of delivered SCM EIPs 14
list of predefined XML documents for exporting data 323
list of predefined XML documents for importing data 325
load notification EIP 297
load notification process 298
location data, understanding 207

M

manufacturer ID
specifying 231
UCC/EAN 231
manufacturing, picking extract file format 280
Map Business Unit page 89
Map Detail page 97
Map Set Detail page 99
Map Set IDs page 90
map sets
defining 99, 100
maps
defining 97

N

node associations
defining 101
Node Definitions page 87, 350, 362
Nodes-Connectors page 87
notes xxi

O

order changes, understanding 198
order entry, understanding 196
order release processing, understanding 196
order release, processing 196
order, changes 198
order-to-cash business process, understanding WMS integration 194
outbound EIPs
overview 12
overview architecture 12
outbound EIPs, processing 108

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P

Par Location Count EIP (inbound), use in POU 216
Par Location EIP (outbound), use in POU 216
par location replenishment, file format 255
par locations
  defining for POU 212
  defining for SRS integration 220
PeopleBooks
  ordering xviii
PeopleCode, typographical conventions xx
PeopleSoft application fundamentals xxv
PeopleSoft CRM integration 305
  common objects 305
  EIPs 307
  PeopleSoft Billing 306
  PeopleSoft FieldService 307
  PeopleSoft Order Capture 306
  PeopleSoft Order Management 306
  understanding 305
PeopleSoft SCM integration documentation, navigating 3
PeopleSoft Supply Chain Management Integrations PeopleBook, common elements used in xxv
PeopleSoft Supply Chain Management, understanding integration with supply chain business modeler 321
physical accounting, file format 259
physical inventory
  stock quantity snapshot 205
  understanding 205
picking plan, extract file record definitions 275
picking, setting up 232
PO Chunk Shipto page 90
point-of-use supplier system
  understanding 211
point-of-use supplier system (POU)
  chunking, use to streamline 213
  data flow between PeopleSoft and POU supplier 216
  EIPs, understanding 216
  integration assumptions 212
  Internal Location Expected Receipt EIP (outbound) 216
  item replenishment data, managing 214
  items and par locations, defining 212
  Par Location Count EIP (inbound) 216
  par location data, defining 213
  Par Location EIP (outbound) 216
  restocking supplier 215
  RTVs, creating for supplier items 213
  subscription error management 217
  suppliers, tracking as par locations 213
preface xxv
prerequisites xvii
Print Kanban Card page 243
printed documentation xviii
processing
  order release 196
  purchase order expected receipts 201
  reservation 196
  shipping 198
procure-to-pay
  business process 199
  understanding 199
production completion labels, extract file format 270
Publish Outbound Message page 108, 295
pull ticket labels, extract file format 273
pull ticket labels, printing 246
Pull Ticket/Pull List Options page 243
Purchase Order (850)
  example 142
purchase order expected receipts processing, understanding 201
purchase orders, understanding 201
Purchasing Receipt Labels page 243
purchasing receipt labels, printing 244
Purge page 103, 107
putaway, setting up 232

Q

Queue Definitions page 87, 350
Quick Map page 89

R

receiving, understanding 203
record layouts for electronic data collection system, overview 255
related documentation xviii
requisitions, understanding 200
reservation processing 196

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Routings-Parameters page 87

S

Sales Order (850)
example 113
Sales Order Acknowledgement (855)
example 128
sending TMS data from PeopleSoft Inventory to TMS 295
service operations
setting up 83
Service Operations-General page 87
Service Operations-Handler page 87
Service Operations-Routings page 87
SetId Mapping page 89
setting up
labels 230
picking 232
putaway 232
unit of measure 232
wedge command code 231
Setup Fulfillment-Transportation Interface page 292
Setup Vendor to Node page 90
shipment, within a TMS 290
Shipping Carton Label page 244
shipping carton labels
extract file format 264
printing 249
shipping container labels
extract file format 268
printing 252
Shipping Container page 244
shipping processing, understanding 198
Shipping Serial Label page 244
shipping serial labels
extract file format 270
printing 252
shipping, processing 198
Source Code Chunk page 90
SRS 219
See Also See surgical resource software (SRS)
static information update, understanding 206
stock quantity snapshot, physical inventory 205
Storage Container Label page 244
storage container labels
extract file format 263
printing 249
Storage Location Label page 244
storage location labels
extract file format 262, 263
parameters 247
storage location transfers, inventory status updates 205
suggestions, submitting xxii
supply chain business modeler
exporting data 326
importing data 330
integrating with 321
understanding integration with PeopleSoft Supply Chain Management 321
supply chain management enterprise integration points
overview 9
supply chain management integration, getting started 3
surgical resource software (SRS)
chunking 220
data flow between PeopleSoft and SRS 225
EIP error management 226
EIPs, understanding 225
implementing integration 221
integration assumptions 219
item replenishment data for 223
items and par locations for, defining 220
par location data, defining 221
restocking a par location 224
RTVs for par location items 221
stocking case carts from par location 222
understanding 219
system-wide assumptions, warehouse management systems integration 189

T

target sets
setting up 93
Tax Geocode Selection page 341
taxes
associating addresses with geocodes 341
calculating sales and use 335
comparing PeopleSoft tax tables to third-party vendors 335

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identifying vendor dlls and shared library locations 367
identifying vendor plug-in locations 366
identifying Vertex dlls and shared library locations 357
identifying Vertex plug-in locations 356
installing Taxware 365
installing Vertex 355
interacting with third-party vendors during geocode lookup 343
interacting with third-party vendors during invoicing 345
interacting with third-party vendors during online tax calculations 344
interacting with third-party vendors during the Order Completion process 345
reviewing third-party liability reporting 346
setting up Taxware on a UNIX platform 368
setting up Taxware on a Windows NT/2000 platform 367
setting up third-party vendors 337
setting up variables for the Taxware database locations 367
setting up variables for the Vertex database locations 357
setting up Vertex on UNIX platform 359
setting up Vertex on Windows NT/2000 platform 357
troubleshooting installation errors 359
troubleshooting Taxware installation errors 369
understanding address information 340
understanding Canadian tax support 346
understanding geocodes 340
understanding product groups 339
understanding third-party interfacing 341
viewing errors in PeopleSoft Billing 345
viewing errors when calculating taxes online 345
viewing errors when calculating taxes through invoicing 346
Taxware
addresses 340
calculation errors 345
differences for U.S. and Canada 346
interaction with billing during geocode lookup 343
interaction with billing during invoicing 345
interaction with billing during online tax calculations 344
setting up on a UNIX platform 368
setting up on a windows NT/2000 platform 367
troubleshooting installation errors 359, 369
terms 371
third-party tax applications
identifying vendor dlls and shared library locations 367
identifying vendor plug-in locations 366
identifying Vertex dlls and shared library locations 357
identifying Vertex plug-in locations 356
installing Taxware 365
installing Vertex 355
setting up variables for the Taxware database locations 367
setting up variables for the Vertex database locations 357
understanding business interlinks 355, 365
third-party tax solutions
setting up 337
understanding tax interfacing 341
Ticket/Pull List Range page 243
TMS Load Notification page 299
TMS order release EIP 293
TMS order release process 293
TMS Order Release Selection Criteria page 295
Transaction Maintenance page 103, 299
transaction maintenance, using 103
transactions
reviewing examples 111
transactions, purging 239
Transportation Management page 299
transportation management system 289
error correction 300

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integrating with PeopleSoft Inventory 289
load notification EIP 297
order changes 296
processing 297
setting up 291
shipment definition 290
TMS order release EIP 293
troubleshooting, tax calculation errors 345
typographical conventions xx

U

UCC/EAN Manufacturer component 231
UCC/EAN manufacturer ID
setting up 231
UCC/EAN manufacturer ID page 231
UCC/EAN Manufacturer ID page 231
unit of measure, setting up 232
uploading TMS data from the TMS to PeopleSoft Inventory 299

V

vendor data, understanding 207
Vertex
addresses 340
calculation errors 345
differences for U.S. and Canada 346
interaction with billing during geocode lookup 343
interaction with billing during invoicing 345
interaction with billing during online tax calculations 344
setting up on a UNIX platform 359
setting up on a Windows NT/2000 platform 357
troubleshooting installation errors 359
visual cues xxi

W

warehouse management systems (WMS)
enterprise integration points 191
general integration issues 189
overview 189
warnings xxi
wedge command code, setting up 231
WMS 189
See Also See warehouse management systems (WMS)
WMS integration
procure-to-pay 199
static information updates 206
system-wide assumptions 189

X

XML Mapper
implementing 96
overview 96
prerequisites 96

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