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# PeopleSoft Collaborative Supply Management 9.1 PeopleBook

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# PeopleSoft Collaborative Supply Management Preface

This preface discusses:

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

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

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## PeopleSoft Application Fundamentals

The *PeopleSoft Collaborative Supply Management 9.1 PeopleBook* provides you with implementation and processing information for Oracle's PeopleSoft Collaborative Supply Management system. However, additional, essential information describing the setup and design of the system resides in companion documentation. The companion documentation consists of important topics that apply to many or all of Oracle's PeopleSoft applications across the Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of these PeopleBooks.

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

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

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## Pages With Deferred Processing

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

### **See Also**

*PeopleTools PeopleBook: PeopleSoft Application Designer*

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## PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

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## Common Elements Used in This PeopleBook

<b>As of Date</b>	The first date for which a report or process includes data.
<b>BU or Business Unit</b>	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.
<b>Description</b>	Freeflow text up to 256 characters.
<b>Short Description</b>	Freeflow text up to 15 characters.
<b>Effective Date</b>	Date which a table row becomes effective; the date that an action begins. For example, if you want to close a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages and batch processes that use the information use the current row.  <i>See PeopleTools PeopleBook: PeopleSoft Applications User's Guide</i>
<b>Language or Language Code</b>	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.
<b>Process Frequency</b>	Designates the appropriate frequency to process: <ul style="list-style-type: none"> <li>• <i>Once</i>: Processes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to <i>Don't Run</i>.</li> <li>• <i>Always Executes</i>: Process the request every time the batch process runs.</li> <li>• <i>Don't Run</i>: Ignores the request when the batch process runs.</li> </ul>
<b>Process Monitor</b>	View the status of submitted process requests.  <i>See PeopleTools PeopleBook: PeopleSoft Process Scheduler.</i>
<b>Report ID</b>	The report identifier.
<b>Report Manager</b>	View report content, check the status of a report, and see detailed messages.
<b>Run Control ID</b>	A request identification that represents a set of selection criteria for a report or process.
<b>Run</b>	Specify the location where a process or job runs and the process output format.

<b>Status</b>	Check the progress of a report or process. A valid status is <i>Posted, Not Posted, Generated, Processing, or Scheduled</i> .
<b>User ID</b>	The system identifier for the individual who generates a transactions.
<b>Instance or Prcs Instance</b>	The number that represents where the request is in the queue.

## Chapter 1

# Getting Started with PeopleSoft Collaborative Supply Management

This chapter discusses:

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

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## Collaborative Supply Management Integrations

Collaborative Supply Management integrates with these PeopleSoft applications:

- PeopleSoft Flow Production
- PeopleSoft Inventory
- PeopleSoft Supply Planning

### ***PeopleSoft Flow Production***

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

### ***PeopleSoft Inventory***

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

### ***PeopleSoft Supply Planning***

PeopleSoft Collaborative Supply Management sends collaborative schedules to PeopleSoft Supply Planning for use in the Buyer Workbench.

After using the Buyer Workbench in PeopleSoft Supply Planning to develop a material plan for a supplier, the system sends the plan to PeopleSoft Collaborative Supply Management. Then, you can dispatch the plan to the supplier.

## **PeopleSoft Purchasing**

PeopleSoft Collaborative Supply Management displays vendor information based on the user ID. Use the Vendor User Setup component in PeopleSoft Purchasing to associate a user ID with one or more vendors.

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# **Collaborative Supply Management Implementation**

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

## **Collaborative Supply Management Workflows**

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

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

## **Other Sources of Information**

In the planning phase of the implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Application Fundamentals 9.1 PeopleBook*, with information about where to find the most current version of each.

## **See Also**

[Chapter 3, "Using Collaborative Planning Schedules," page 15](#)

*PeopleSoft Application Fundamentals 9.1 PeopleBook*

## Chapter 2

# Implementing Collaborative Supply Management

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

- Review Kanban requests.
- Review inventory quantity balances.
- Create collaborative planning schedules.

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## Understanding PeopleSoft Collaborative Supply Management

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

### Prerequisites

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

To set up supplier defaults, use the Configure External Access component (PO\_SUPP\_SETUP).

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

### See Also

*PeopleSoft Source-to-Settle Common Information 9.1 PeopleBook*, "Maintaining Vendor Information," Vendor Profiles

## Collaborative Supply Management Functional Areas

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

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

Collaborative Supply Management consists of three functional areas:

- Collaborative planning schedules.

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

- Kanban request review.

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

- Inventory quantity balance review.

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

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## Reviewing Kanban Requests

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

This section discusses how to:

- View vendor Kanban requests.
- View vendor-sourced replenishment requests.
- View details for vendor-sourced replenishment requests that are outstanding or have just been dispatched.

## Pages Used to Review Kanban Requests

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
View Kanban Requests - Select Vendor	SF_SS_VND_LIST	Manage Supply, View Kanban Requests	Select the vendors whose Kanban requests you want to review.  <i>See PeopleSoft eSupplier Connection 9.1 PeopleBook , "Maintaining Vendor Information," Maintaining External Users.</i>  <b>Note.</b> This page does not appear if only one vendor is associated with the user.
View Kanban Requests	SF_VND_KANBAN_LIST	Manage Supply, View Kanban Requests  Click a vendor name on the View Kanban Requests - Select Vendor page (if user is associated with multiple vendors). Use this page if user is not associated with multiple vendors.	View vendor-sourced replenishment requests that have been dispatched, are in process, and are completed.
Vendor Kanban Request Details	SF_VND_KANBAN_SP	Click a Kanban ID link in the Kanban ID column on the View Kanban Requests page.	View details for vendor- sourced replenishment requests that are outstanding or have just been dispatched.

## Viewing Vendor-Sourced Replenishment Requests

Access the View Kanban Requests page (Manage Supply, View Kanban Requests).

View Kanban Requests

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

Kanbans								
Kanban ID	Status	Item ID	Description	Vendor Qty	UOM	Ship To	Date Time Dispatched	Viewed
<a href="#">KBI000000000104</a>	Dispatched	WHEEL	Wheel Tire, 700x23	100.0000	EA	COLORADO BIKE MFG/OUTDOOR	07/24/2000 3:13PM	<input type="checkbox"/>
<a href="#">KBI000000000103</a>	Dispatched	WHEEL	Wheel Tire, 700x23	100.0000	EA	COLORADO BIKE MFG/OUTDOOR	07/24/2000 3:13PM	<input type="checkbox"/>
<a href="#">KBI000000000101</a>	Dispatched	WHEEL	Wheel Tire, 700x23	100.0000	EA	COLORADO BIKE MFG/OUTDOOR	07/24/2000 3:13PM	<input type="checkbox"/>

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

## View Kanban Requests page

### Show Status

Values are:

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

### Sort By

Values are:

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

See *PeopleSoft Manufacturing 9.1 PeopleBook*, "Issuing Material to Production."

### Status

WIP replenishment status. Values are:

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

### Item ID

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

**Vendor Qty** (vendor quantity) Displays the quantity in the vendor's unit of measure.

**UOM** (unit of measure) Displays the vendor's unit of measure.

<b>Date Time Dispatched</b>	Displays the date and time of dispatch.
<b>Viewed</b>	Select to hide the Kanban requests once they have been reviewed.

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

Access the Vendor Kanban Request Details page (click a Kanban ID link in the Kanban ID column on the View Kanban Requests page).

**Vendor Kanban Request Details**

**Vendor Location:** MAIN

**Kanban ID:** KBI000000000104

**Item ID:** WHEEL  
Wheel Tire, 700x23 / LT5002

**Storage Area:** SA AIS1 ROW1 BIN1

---

**WIP RPL Status:** Dispatched

**Vendor Qty:** 100.0000 EA

**Creation Datetime:** 06/27/2000 11:24AM

**Date Time Dispatched:** 07/24/2000 3:13PM

**Date/Time Completed:**

[Return](#)

Vendor Kanban Request Details page

<b>Vendor Location</b>	Displays the vendor location that replenishes the item.
<b>Kanban ID</b>	Displays a unique identifier used to track replenishment requests.
<b>Item ID</b>	Represents the vendor item ID, if one exists; otherwise, the item ID appears.
<b>Storage Area</b>	Displays the WIP location for delivery of replenishment request.

<b>WIP RPL Status</b> (work in progress replenishment status)	Values are: <ul style="list-style-type: none"><li>• <i>Dispatched</i></li><li>• <i>In Process</i></li><li>• <i>Complete</i></li></ul>
<b>Creation Datetime</b>	Displays the date that the Kanban ID was created.
<b>Date Time Dispatched</b>	Displays the date and time that the dispatch replenishment request process was run.
<b>Date/Time Completed</b>	Displays the date and time that the replenishment request was completed.

### **See Also**

*PeopleSoft Managing Items 9.1 PeopleBook, "Defining Items by SetID"*

---

## **Reviewing Inventory Quantity Balances**

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

This section discusses how to:

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

## Pages Used to Review Inventory Quantity Balances

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
View Inventory Quantity Balances - Select Vendor	WV_SS_VND_LIST	<ul style="list-style-type: none"> <li>Manage Supply, View Inventory Qty Balances  Click a vendor name on the View Inventory Quantity balances - Select Vendor page.</li> <li>Manage Supply, Approve Schedules</li> </ul>	<p>If more than one vendor is available, select a vendor and review inventory quantity balances for that vendor.</p> <p>See <i>PeopleSoft eSupplier Connection 9.1 PeopleBook</i>, "Maintaining Vendor Information," Maintaining External Users.</p> <p><b>Note.</b> This page does not appear unless more than one vendor is associated with the user.</p>
View Inventory Quantity Balances - Filter Options	IN_SSQTYBAL_SEL	<ul style="list-style-type: none"> <li>If the user is associated with multiple vendors, select a vendor on the View Inventory Quantity Balances - Select Vendor page.</li> <li>Manage Supply, View Inventory Quantity Balances (if the user is not associated with multiple vendors.)</li> <li>Click the Set Filter Options link on the View Inventory Quantity Balances - Quantity Details page.</li> </ul>	Search for quantity balances.
View Inventory Quantity Balances - Quantity Details	IN_SSQTYBAL_SUM	<p>Enter selection criteria on the View Inventory Quantity Balances - Filter Options page, and click the Search button.</p> <p>Click the Show all/Enhanced link on the Remaining Quantity Balances pagelet on PeopleSoft supplier portal.</p>	View the inventory quantity available, the quantity owned by the supplier, and the percent remaining of the quantity available for consigned items.
View Inventory Quantity Balances - Item Replenishment Details	IN_SSQBALITM_DET	Click an Item ID link in any row in the Item ID column on the Quantity Details page.	View replenishment details for a selected item.

Page Name	Definition Name	Navigation	Usage
View Inventory Quantity Balances - Unit Details	IN_SSQBALBUNIT_DET	Click a name link in any row in the Unit column on the Quantity Details page.	Suppliers can use this page to review additional information about an inventory business unit that appears on the Quantity Details page.

## Searching for Quantity Balances

Access the View Inventory Quantity Balances - Filter Options page (click the Set Filter Options link on the View Inventory Quantity Balances - Quantity Details page).

**View Inventory Quantity Balances**

---

**Filter Options**

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**Search Criteria**

Unit:

Item ID:  

Vendor Item ID:

Category:  

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

[Return to Vendor List](#)

View Inventory Quantity Balances - Filter Options page

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

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

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

<b>Vendor Item ID</b>	Select a vendor ID to display only the quantities that are associated with that vendor item ID. Enter a partial value followed by % to select all vendor item IDs that begin with the partial value. For example, enter <i>BIKE%</i> to select all vendor item IDs that begin with <i>BIKE</i> .
<b>Category</b>	Select an item category to display only the quantities that are associated with that item category.
<b>Percent Remaining</b>	<p>Enter a percent remaining to display only the quantities at that percent remaining or lower. Enter 0 to display all values at or below the reorder point. Percent remaining equals the difference between quantity available and reorder point, divided by restock value.</p> <p>This field is beneficial only if reorder point and restock values are maintained for the item.</p>
<b>Search</b>	Enter the search criteria, and click the Search button.

### **See Also**

*PeopleSoft Purchasing 9.1 PeopleBook*, "Defining Purchasing Item Information," Defining Purchasing Item Categories

*PeopleSoft eSupplier Connection 9.1 PeopleBook*, "Maintaining Vendor Information," Maintaining External Users

*PeopleSoft Managing Items 9.1 PeopleBook*, "Defining Items by SetID," Defining Configuration Attributes for an Item

*PeopleSoft Managing Items 9.1 PeopleBook*, "Defining Item Control Values"

## **Viewing Inventory Quantity Balances Details**

Access the View Inventory Quantity Balances - Quantity Details page (click the Search button after entering the selection criteria on the View Inventory Quantity Balances - Filter Options page, and click the Show all/Enhanced link on the Remaining Quantity Balances pagelet on PeopleSoft supplier portal).

**View Inventory Quantity Balances**

---

**Quantity Details**

ERNIE'S BIKE SHOP

[Set Filter Options](#) [Return to Vendor List](#)

Item Quantity Details								
Item ID	Description	Qty Owned by Vendor	Qty Available	UOM	Reorder Point	Percent Remaining	Unit	Category
<a href="#">FR7001</a>	Bike Frame, Steel	0.0000	298.0000	EA	250.0000	19.20	<a href="#">COLORADO BIKE MFG/OUTDOOR</a>	CYCLING
<a href="#">FR7002</a>	Bike Frame, Aluminium	0.0000	10.0000	EA	10.0000	0.00	<a href="#">COLORADO BIKE MFG/OUTDOOR</a>	CYCLING
<a href="#">FR7003</a>	Bike Frame, Carbon Fiber	0.0000	280.0000	EA	250.0000	12.00	<a href="#">COLORADO BIKE MFG/OUTDOOR</a>	CYCLING

View Inventory Quantity Balances - Quantity Details page

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

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

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**See Also**

*PeopleSoft Purchasing 9.1 PeopleBook*, "Defining Purchasing Item Information," Defining Purchasing Item Categories

*PeopleSoft eSupplier Connection 9.1 PeopleBook*, "Maintaining Vendor Information," Maintaining External Users

*PeopleSoft Managing Items 9.1 PeopleBook*, "Defining Items by SetID," Defining Configuration Attributes for an Item

*PeopleSoft Managing Items 9.1 PeopleBook*, "Defining Item Control Values"

**Viewing Replenishment Details for a Selected Item**

Access the View Inventory Quantity Balances - Item Replenishment Details page (click an Item ID link in any row in the Item ID column on the Quantity Details page).

<u>View Inventory Quantity Balances</u>			
<b>Item Replenishment Details</b>			<a href="#">Return</a>
<b>Unit:</b>	CO Ops	COLORADO BIKE MFG/OUTDOOR	
<b>Item ID:</b>	FR7001	<b>Vendor Item ID:</b>	
	Bike Frame, Steel		
<b>Quantity Available:</b>	298.0000	<b>Qty Owned by Vendor:</b>	0.0000
<b>Qty On Hand:</b>	298.0000		
<b>Replenishment</b>			
<b>Replenish Class:</b>			
<b>Replenish Calc Period (Days):</b>	365	<b>Replenish Lead (Days):</b>	
<b>Reorder Point:</b>	250.0000	<b>Reorder Quantity:</b>	250.0000
<b>Maximum Quantity:</b>	1000.0000	<b>Safety Stock:</b>	
<b>Last Annual Demand:</b>		<b>Economic Order Quantity:</b>	
<b>Desired Stock-In Probability:</b>	95.0 %		

View Inventory Quantity Balances - Item Replenishment Details page

**Qty On Hand** (quantity on hand)

Displays the total item quantity in a particular business unit, regardless of the stock's inventory status and storage location. Includes both the item quantity available and the quantity reserved. Does not reflect the total item quantity that can be used to fulfill demand.

<b>Replenishment Class</b>	Displays groupings for items that are subject to automatic replenishment.
<b>Replenish Calc Period (Days)</b> (replenishment calculation period [days])	Displays the number of days used in calculating the item's replenishment values.
<b>Replenish Lead (Days)</b>	Displays the average number of days from placement of the purchase order to receipt of the stock.
<b>Reorder Quantity</b>	Displays the static quantity ordered by automated replenishment events.
<b>Maximum Quantity</b>	Displays the maximum stocking quantity for the item.
<b>Safety Stock</b>	Displays the buffer stocking level to guard against unanticipated surges (or spikes) in average daily demand.
<b>Last Annual Demand</b>	Displays the item's annual demand.
<b>Economic Order Quantity</b>	Displays the fixed-order quantity that determines the amount of an item to be purchased or manufactured at one time.
<b>Desired Stock-In Probability</b>	Displays the percentage of the time to have stock on hand for an item.

**See Also**

*PeopleSoft Managing Items 9.1 PeopleBook*, "Defining Items by Business Unit," Defining Item Replenishment Attributes

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## Creating Collaborative Planning Schedules

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

**See Also**

[Chapter 3, "Using Collaborative Planning Schedules," page 15](#)

## Chapter 3

# Using Collaborative Planning Schedules

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

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

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## Understanding Collaborative Planning Schedules

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

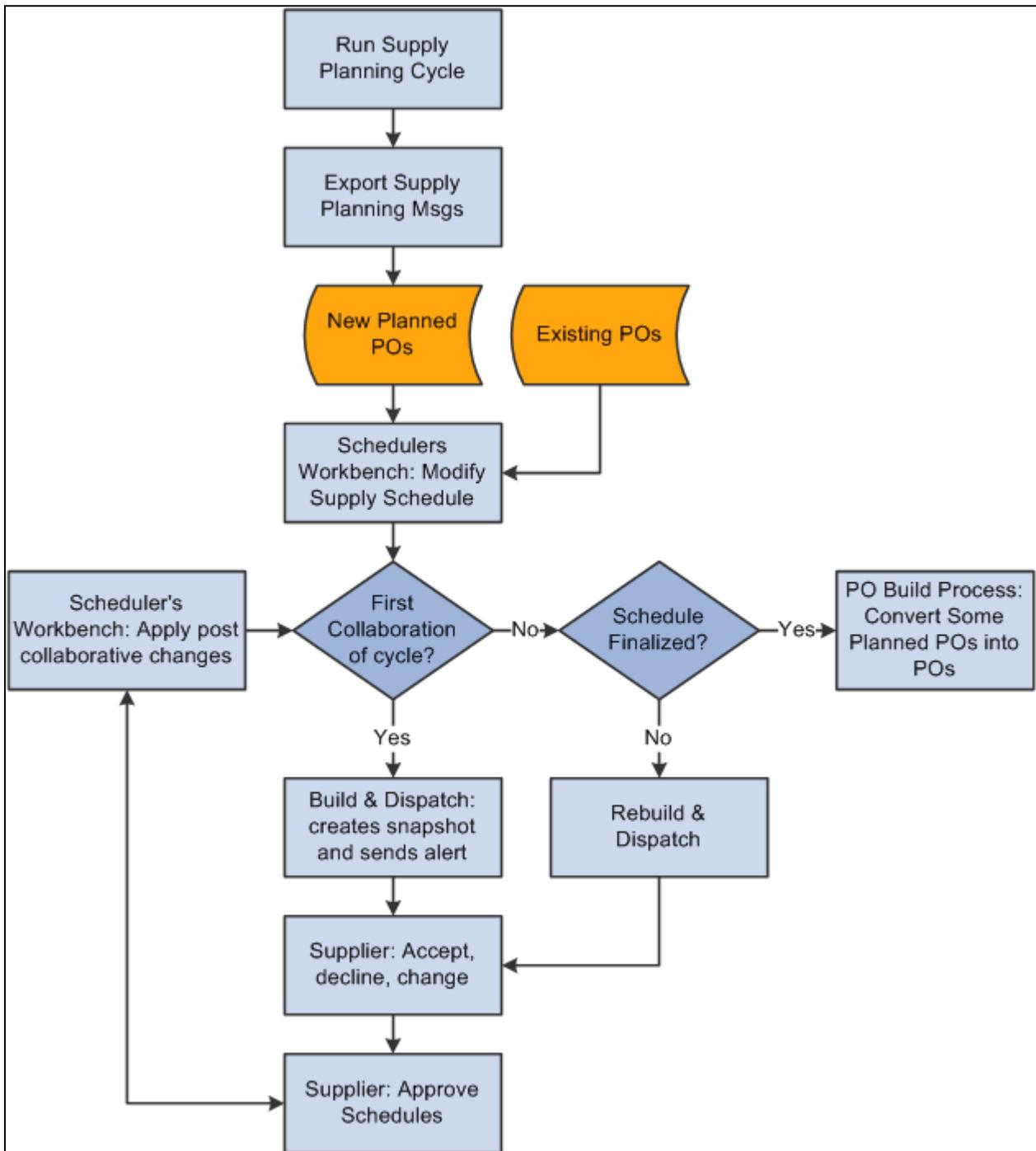
With PeopleSoft collaborative planning schedules, you can:

- Build, review, and maintain a supply plan.

- Dispatch the supply plan to a supplier.
- Collaborate on the supply plan with a supplier, or optionally define the plan as a display-only schedule.
- Enable the supplier to review and approve the collaborative changes to the supply plan, and then be notified when the plan is approved.
- Apply collaborative changes to the supply plan.

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

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



Collaborative Supply Management process flow

This section lists common elements and discusses:

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

**See Also**

[Appendix A, "Delivered Workflows for Collaborative Supply Management," page 79](#)

**Common Elements Used in This Chapter**

<b>Apply mode</b>	Refers to the reconciliation Apply mode in the Scheduler's Workbench which enables the scheduler to compare and reconcile approved supplier quantities and suggested changes with actual required quantities (planned orders). Clicking the Apply link for approved schedules in the Scheduler's Workbench - List page enables you access in Apply mode. Within this page proposed quantities are calculated based on supplier feedback and the latest actual required quantities.
	The scheduler can review and change proposed quantities in the schedule and then directly update the schedule with the click of a button.
<b>Baseline Quantity</b>	Represents the approved quantity which existed for the same range of days for the prior approved schedule.
	When using Flex within a schedule, this upside or downside flex is measured against the baseline quantity for the day or range of days.
	<u>See Chapter 3, "Using Collaborative Planning Schedules," Defining Fixed or Firmed Attributes, page 32.</u>
<b>Scheduler</b>	The name of the person within the organization who is responsible for reviewing, building, and dispatching the schedule to the supplier. The scheduler (for example, a buyer or planner) also approves and applies the changes suggested by the supplier.
<b>Schedule Group</b>	A logical grouping of similar vendor items within Collaborative Supply Management.
<b>Supplier's Schedule</b>	The name of the (supplier side) schedule that shows the time-phased quantities that the scheduler proposes. The supplier reviews the schedule that the scheduler dispatches and decides whether to accept, reject, or change the data.
<b>IN Unit</b> (inventory business unit)	The Inventory business unit for which you are purchasing the items. Schedule groups can include supply requirements from multiple Inventory business units.
<b>Period Duration</b>	The period of time for which the system buckets the quantity data for a schedule. Values are <i>Day</i> , <i>Week</i> (default), and <i>Month</i> .
<b>Start Date</b>	The beginning date for a given schedule. Typically this is a future date (for example one week out). When you build a new schedule, the system generates a snapshot of the supply requirements (purchase orders and planned orders) between the start date (beginning date for the collaborative schedule) and the end date.

<b>Number of Periods</b>	The number of periods based on the period duration (days, weeks, or months) for a specific schedule. The maximum number is 52.
<b>Week starts on</b>	The day of the week on which weeks begin for schedules with a period duration of Week.
<b>Row Types</b>	<p>Describes the quantities displayed within a particular row of data within a supplier schedule.</p> <p>Depending on the status of the schedule and the person receiving the schedule (scheduler or supplier), different row types display within a schedule. For example, the Actual Required Qty row type represents the actual purchase orders and planned quantities currently existing for the item or schedule group as shown within the Scheduler's Workbench for a new schedule.</p>
<b>Status</b>	The status of the schedule. For a new schedule, the status is <i>New Schedule</i> . For current schedules, status values are <i>Current</i> , <i>Dispatched</i> , and <i>Approved</i> . For past schedules, item status values are <i>Previous</i> and <i>History</i> .
<b>Created Date/Time</b>	The date and time that the schedule was built.
<b>Dispatched Date/Time</b>	The date and time that the schedule was dispatched.
<b>Approved Date/Time</b>	The date and time that the schedule was approved.
<b>Scheduler's Comment</b>	The comments entered by the scheduler for a specific schedule.
<b>Supplier's Comment</b>	Comments that the supplier enters for a specific schedule. These comments are visible only after the schedule has been approved by the supplier.
<b>Previous Comments</b>	Comments associated with a previous schedule
<b>Include PO Data</b> (include purchase order data)	<p>Select to include the purchase order data in the schedule. If the check box is deselected, only planned purchase order data is included.</p> <p>This option is available only when creating new schedules.</p>
<b>Dispatch</b>	Select to send a built schedule to the supplier for review. You must specify a dispatch method. Options are <i>Email</i> and <i>Other</i> . If you do not select Dispatch, the built schedule retains the status <i>Current</i> .
<b>UOM to View Quantities</b> (unit of measure to view quantities)	<p>Select the unit of measure (UOM) in which to view the quantities on the schedule. The supplier can select either the standard UOM or the vendor default UOM for the schedule summary. If the supplier selects the vendor default UOM and the schedule is a group of items, all items must have the same vendor default UOM. Otherwise, a message displays and the summary information displays in the standard UOM.</p> <p>The vendor default UOM is the default UOM associated with the default vendor location for the specified vendor.</p>

<b>View Only Schedule</b>	Indicates that you want to send the schedule to the supplier, but the supplier cannot change the schedule. The schedule status is set to <i>Approved</i> , and the schedule is dispatched to the supplier.
<b>Show new schedules only</b>	Select to view newly dispatched schedules only. Approved schedules are excluded. This field applies to suppliers only.
<b>Show Std Qty/UOM</b> (show standard quantity unit of measure)	Select to display the various quantity values for the schedule detail sections in terms of the standard UOM. The buyer will automatically be able to view these columns, but the supplier has the option of viewing the summary data in terms of the vendor default UOM. This enables suppliers to view the detail quantities in standard and vendor default UOMs.
<b>Show Order Qty/UOM</b> (show order quantity unit of measure)	Select to display the various quantity values for the schedule detail sections in terms of the ordering UOM. Since the summary section is displayed in terms of the standard UOM or the vendor default UOM, this enables you to also see the detail quantities in terms of the actual ordering quantity, if it is different.
<b>Show Vendor Qty/UOM</b> (show vendor quantity unit of measure)	Select to display the various quantity values for the schedule detail sections in terms of the vendor's default UOM.  The Scheduler's Workbench always displays the summary quantities in terms of the standard UOM; thus this option enables the scheduler to also view the quantities in terms of the vendor default UOM. The supplier can view the summary quantities in the vendor or standard UOM, so if they are viewing the summary in the standard UOM, this enables suppliers to also see the quantities in terms of the vendor default UOM.

## Standard Buttons

These are buttons that are used throughout this chapter.

<b>Preview Schedule</b>	List all the items to be dispatched. This button appears in the dispatch batch process.
<b>Update</b>	Update in workbenches implies updating the schedule summary with changes made in the detail. In Apply mode, this button appears in the header section of the schedule and it is used to update the entire schedule based on proposed quantities.
<b>Search</b>	Click to retrieve data after you define the parameters.
<b>Update</b>	Click to update the quantities on the Summary page for the affected row types.
<b>Save, Return</b>	Click to save the data and return to the Summary page.
<b>Add</b>	Click to add a new planned purchase order. Applicable on the supplier's side.

<b>Send</b>	Click to send the message.
<b>Calculate capacity/Flex</b>	Click to calculate the supply schedule values against capacity or flex requirements.
	This red box denotes that there is a violation. For capacity violations, clicking the Calculate Date button will generate the date on which the violation first appears. If the date is within the schedule being maintained, it becomes a link that you can click which takes you to the actual bucket containing this date.
	Click the Add button to add a new planned purchase order. Applicable on the scheduler side.
	Click the Delete button to delete a planned order row. You can delete rows only if Supply Planning is <i>not</i> installed. Applicable on the scheduler's side.
	Click the left scroll arrow to go backward through the bucket columns and save changes.
	Click the right scroll arrow to go forward through the bucket columns and save changes.
	Click the Approve All button to approve all rows.  You indicate that planned purchase orders are ready to be converted to purchase orders. (Clicking the button is the same as approving the line on the Receive Purchase Messages page.)
	Click to reset approval for all rows.

## Supply Schedule Statuses

The supply schedule statuses are:

<b>Current</b>	After you build a new schedule, the status is <i>Current</i> . The status does not change until you dispatch the schedule. The current schedule is a snapshot of the purchase orders and planned purchase orders. Once a schedule is built, any changes to actual purchase orders or planned purchase orders are not incorporated into the current schedule unless it is rebuilt.
<b>Dispatched and New</b>	The schedule status is <i>Dispatched</i> after the you run the Dispatch process to send the schedule to the supplier through email. Once the schedule is dispatched, it becomes available for collaboration with the supplier.  From the supplier's perspective, a schedule dispatched from the scheduler has the status <i>New</i> . The status does not change until the supplier approves it.

<b>Supplier Approved</b>	The schedule status is <i>Supplier Approved</i> after the supplier approves it by clicking the Approve button on the Approve Schedules - Item Summary page. The scheduler cannot view the supplier's collaboration quantities until the supplier approves the schedule.
<b>Previous</b>	The current schedule's status changes from <i>Current</i> to <i>Previous</i> when you build a new schedule.
<b>History</b>	The previous schedule's status changes from <i>Previous</i> to <i>History</i> when you build a new schedule.

## Scheduler's Workbench Row Types

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

<b>Row Type</b>	<b>Schedule Statuses</b>	<b>Description of Row Type</b>
Actual Required Qty (actual required quantity)	<ul style="list-style-type: none"> <li>• <i>New</i></li> <li>• <i>Current</i></li> <li>• <i>Dispatched</i></li> <li>• <i>Supplier Approved</i></li> </ul>	The system derives this quantity from the purchase order schedule lines and planned purchase order data. The system populates the planned purchase orders when you run the Export Supply Planning process.
Additional Qty Since Approved	<ul style="list-style-type: none"> <li>• <i>New</i></li> <li>• <i>Dispatched</i></li> </ul>	This is the difference between the current requirements and the quantity that was previously agreed on.  (Actual Required Qty – Previous Approved Qty) = Additional Qty Since Approved
Additional Qty Since Build	<ul style="list-style-type: none"> <li>• <i>Current</i></li> <li>• <i>Dispatched</i></li> <li>• <i>Supplier Approved</i></li> </ul>	This is the difference between the current requirements and the requirements when you built the schedule.  (Actual Required Qty – Current Required Qty) = Additional Qty Since Build

<b>Row Type</b>	<b>Schedule Statuses</b>	<b>Description of Row Type</b>
Previous Required Qty	<ul style="list-style-type: none"> <li>• <i>New</i></li> <li>• <i>Current</i></li> <li>• <i>Dispatched</i></li> <li>• <i>Supplier Approved</i></li> <li>• <i>Previous</i></li> <li>• <i>History</i></li> </ul>	<p>This is the required quantity on the last schedule that you dispatched to the supplier.</p> <p>When you view the previous or history schedule, this row displays the final required quantity for the schedule being reviewed.</p>
Previous Approved Qty	<ul style="list-style-type: none"> <li>• <i>New</i></li> <li>• <i>Current</i></li> <li>• <i>Dispatched</i></li> <li>• <i>Supplier Approved</i></li> <li>• <i>Previous</i></li> <li>• <i>History</i></li> </ul>	<p>This is the quantity on the last schedule that the supplier approved.</p> <p>When you view the previous or history schedule, this row displays the final approved quantity for the schedule being reviewed.</p>
Current Required Qty	<ul style="list-style-type: none"> <li>• <i>Current</i></li> <li>• <i>Dispatched</i></li> <li>• <i>Supplier Approved</i></li> </ul>	<p>This is the required quantity at the time that the schedule was built. The quantity includes any purchase order (if requested) and planned purchase orders.</p>
Current Approved Qty	<i>Supplier Approved</i>	This is the quantity that the supplier approved.
Shortage/Overage	<i>Supplier Approved</i>	<p>This is the shortage or surplus that you might have with the supplier's approved quantity for a particular bucket (day, week, or month).</p> <p><math>(\text{Current Required Qty}) - (\text{Current Approved Qty}) = (\text{Shortage/Overage})</math></p>
Short/Over Rolling	<i>Supplier Approved</i>	<p>This is the rolling cumulative total for overage or shortage across all buckets.</p> <p><math>(\text{Last Buckets Over/Under Rolling Total}) + (\text{Current Column Over or Under Value}) = (\text{Short/Over Rolling})</math></p>

<b>Row Type</b>	<b>Schedule Statuses</b>	<b>Description of Row Type</b>
Proposed Apply Qty	<i>Supplier Approved</i>	<p>This is the quantity that is updated to the live data (actual planned orders). The Apply process updates planned orders directly. However, you must perform purchase order updates manually.</p> <p>This row type only appears when you click the Apply link on the schedule list.</p>
Actual Shortage/Overage	<i>Supplier Approved</i>	<p>This is the actual shortage or overage.</p> <p>(Proposed Apply Qty – Actual Required Qty) = (Actual Shortage/Overage)</p> <p>This row type appears when you click the Apply link on the schedule list.</p>
Actual Short/Over Rolling	<i>Supplier Approved</i>	<p>This is the rolling cumulative total for actual shortage or overage.</p> <p>This row type appears only when you click the Apply link on the schedule list.</p>

## Supplier's Approve Schedule Row Types

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

<b>Row Type</b>	<b>Schedule Statuses</b>	<b>Description of Row Type</b>
Previous Required Qty (previous required quantity)	<ul style="list-style-type: none"> <li>• <i>New</i></li> <li>• <i>Supplier Approved</i></li> <li>• <i>Previous</i></li> <li>• <i>History</i></li> </ul>	<p>This is the requested quantity on the last schedule that the scheduler dispatched to the supplier.</p> <p>When you view the previous or history schedule, this row displays the final requested quantity for the schedule that is being reviewed.</p>

<b>Row Type</b>	<b>Schedule Statuses</b>	<b>Description of Row Type</b>
Previous Approved Qty	<ul style="list-style-type: none"> <li>• <i>New</i></li> <li>• <i>Supplier Approved</i></li> <li>• <i>Previous</i></li> <li>• <i>History</i></li> </ul>	<p>This is the quantity on the last schedule that the supplier approved.</p> <p>When you view the previous or history schedule, this row displays the final approved quantity for the schedule that is being reviewed.</p>
Additional Qty Since Approved	<ul style="list-style-type: none"> <li>• <i>New</i></li> <li>• <i>Supplier Approved</i></li> </ul>	<p>This is the net change in requested quantity since the last approved schedule.</p>
Current Required Qty	<ul style="list-style-type: none"> <li>• <i>New</i></li> <li>• <i>Supplier Approved</i></li> </ul>	<p>This is the current quantity on the requested schedule. The quantity includes any purchase order schedule lines and planned purchase orders.</p> <p>(Previous Required Qty + Additional Qty Since Approved) = (Current Required Qty)</p>
Pending Approval Qty	<i>New</i> (same as Dispatched on the scheduler's Workbench)	<p>This is the quantity that the supplier is willing to provide. By default, it is the current required quantity. Once the schedule is approved, this row type changes to Current Approved Qty.</p>
Current Approved Qty	<i>Supplier Approved</i>	<p>This is the quantity that the supplier approved.</p>
Shortage/Overage	<ul style="list-style-type: none"> <li>• <i>New</i></li> <li>• <i>Supplier Approved</i></li> </ul>	<p>This is the shortage or surplus that the scheduler will have if the pending approval quantity is accepted.</p> <p>If the schedule status is approved, then:</p> <p>(Current Approved Qty – Current Required Qty) = (Shortage/Overage)</p> <p>If the schedule status is dispatched, then:</p> <p>(Pending Approval Qty – Current Required Qty) = (Shortage/Overage)</p>

<b>Row Type</b>	<b>Schedule Statuses</b>	<b>Description of Row Type</b>
Short/Over Rolling	<ul style="list-style-type: none"> <li>• <i>New</i></li> <li>• <i>Supplier Approved</i></li> </ul>	<p>This is the rolling cumulative total for the overage or shortage across all buckets.</p> <p>(Last Buckets Over/Under Rolling Total) + (Current Column Over/Under Value) = (Short/Over Rolling)</p>

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## Defining Vendor Information for Collaborative Planning Schedules

This section lists the page used to define vendor information.

### Page Used to Define Vendor Information

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

#### See Also

*PeopleSoft Purchasing 9.1 PeopleBook*, "Defining Purchasing Item Information," Defining Attributes and Priorities for Purchasing Item Vendor Relationships

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## Defining and Maintaining Schedule Groups and Related Information

To set up schedule groups, use the Group Capacity component (ITM\_CAPACITY\_GROUP).

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

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

## Understanding Schedule Groups

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

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

## Pages Used to Define and Maintain Schedule Group and Related Information

Page Name	Definition Name	Navigation	Usage
Item/Business Unit	ITM_CAP_GRP_BU	Purchasing, Supplier Schedules, Schedule Group, Item/Business Unit	Define a schedule group of vendor items.
Add Items	ITM_VND_BU_ATT_ADD	<ul style="list-style-type: none"> <li>• Click the Add Multiple Items button on the Schedule Group page.</li> <li>• Click the Add button on the Item/Vendor/BU attributes page (Item Definition).</li> </ul>	Add a single item or multiple items to a schedule group.
Capacity	ITM_CAP_GRP_RANGE ITM_CAP_RANGE	<ul style="list-style-type: none"> <li>• Purchasing, Supplier Schedules, Schedule Group, Capacity</li> <li>• Purchasing, Supplier Schedules, Schedule Item Attributes</li> </ul> <p>Click the Capacity link to access the Capacity page.</p>	(optional) Define beginning and end dates and maximum capacity for suppliers. Indicates a supplier's ability to deliver the quantity for a particular time frame.

Page Name	Definition Name	Navigation	Usage
Flex	ITM_CAP_GRP_FLX ITM_CAP_FLEX	<ul style="list-style-type: none"> <li>Purchasing, Supplier Schedules, Schedule Group, Flex</li> <li>Purchasing, Supplier Schedules, Schedule Item Attributes</li> </ul> <p>Click the Capacity link, then the Flex page tab.</p>	<p>Indicate the fences and tolerances for the supplier associated with the schedule group or item</p> <p><b>Note.</b> This page is available for scheduled items or groups only.</p>

## Defining a Schedule Group

Access the Item/Business Unit page (Purchasing, Supplier Schedules, Schedule Group, Item/Business Unit).

The screenshot displays the 'Item/Business Unit' configuration page. At the top, there are three tabs: 'Item/Business Unit' (selected), 'Capacity', and 'Flex'. Below the tabs, the following fields are visible:

- SetID:** SHARE
- Group:** BRAKES
- VMI Item Default**
- Schedule Item**
- \*Std UOM:** EA (Each)
- Buyer/Planner:** VP1
- \*Description:** Bike Brakes

Below these fields are two sections:

- Vendors:** Shows SetID: SHARE, Vendor ID: SCM0000004, and Location: MAIN. Includes an 'Add Multiple Items' button.
- Items:** A table with columns 'Item ID', 'Business Unit', and 'Description'. It lists three items:
 

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

Item/Business Unit page

**Std UOM** (standard unit of measure)

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

**Schedule Item**

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

<b>VMI Item Default</b> (vendor-managed inventory)	Select if the inventory for this item is maintained by the vendor and you want to enable suppliers visibility to the quantity on hand (QOH) for this item by using Collaborative Supply Management. This will be the <i>default</i> value for all items to be added to this group, but can be modified for each item. Changing this option does not affect this option for items previously added to the group.
<b>Buyer/Planner</b>	(Optional) Select the buyer or planner (scheduler) who is responsible for this schedule group. This field is used for workflow and email notifications when the supplier approves a schedule.

### **Vendors**

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

1. Click the Add button to add vendors to the schedule group.

Select the SetID, Vendor ID, and vendor Location.

2. Add items individually or click the Add Multiple Items button to add several items at one time to the same vendor and vendor location.

---

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

---

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

### **See Also**

[Appendix A, "Delivered Workflows for Collaborative Supply Management," page 79](#)

## **Adding Multiple Items to a Schedule Group**

Access the Add Items page (click the Add Multiple Items button on the Schedule Group page).

**Add Items**

**Search Criteria**

Vendor SetID: SHARE Vendor ID: SCM0000004 Location: MAIN  
 Item SetID: SHARE Item ID:   
 IN Unit: GBR02  Consigned items only

**Associate**

Schedule Group: BRAKES

Select All  Clear All

**Items** Customize | Find | View All | First 1-44 of 44 Last

	Vendor SetID	Vendor ID	Vendor Location	SetID	Item ID	Description	Inventory Unit
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10000	Long Sleeve Biking Jersey, Men's	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10002	Long Sleeve T-Shirt, Mens	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10003	Long Sleeve Biking Jersey, Women's	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10005	Switchback Mountain Biking Shorts, Men's	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10007	Sidepocket Shorts, Womens	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10011	Biking Gloves, Unisex	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10014	Cadence Kit	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10015	AT9090 Altimeter	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10016	TC8799 Cyclometer	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10017	Wireless Cycle Computer	GBR02

Add Items page (1 of 2)

<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10017	Wireless Cycle Computer	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10020	Hand Pump, Frame Attachment	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10021	Dual Pump, Tire or Floor	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10022	CycleBest Combination Padlock	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10026	Patch Kit	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10027	Bicycle Tire Patches	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10029	Taxi Child Seat	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10030	Folding Child Trailer	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10031	Co-Z Child Trailer	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10058	Hard-sided Cooler, 40 Qt.	GBR02
<input type="checkbox"/>	SHARE	SCM0000004	MAIN	SHARE	10059	Ice Chest, 20 Qt.	GBR02

Add Items page (2 of 2)

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

### ***Associate***

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

## **Adding Individual Items to a Schedule Group**

Access the Item/Business Unit page (Purchasing, Supplier Schedules, Schedule Group, Item/Business Unit).

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

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

## **Defining Vendor Capacity**

Access the Capacity page (Purchasing, Supplier Schedules, Schedule Group, Capacity).

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

## Capacity

### From Date and To Date

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

---

**Note.** Dates cannot overlap.

---

### Maximum Capacity

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

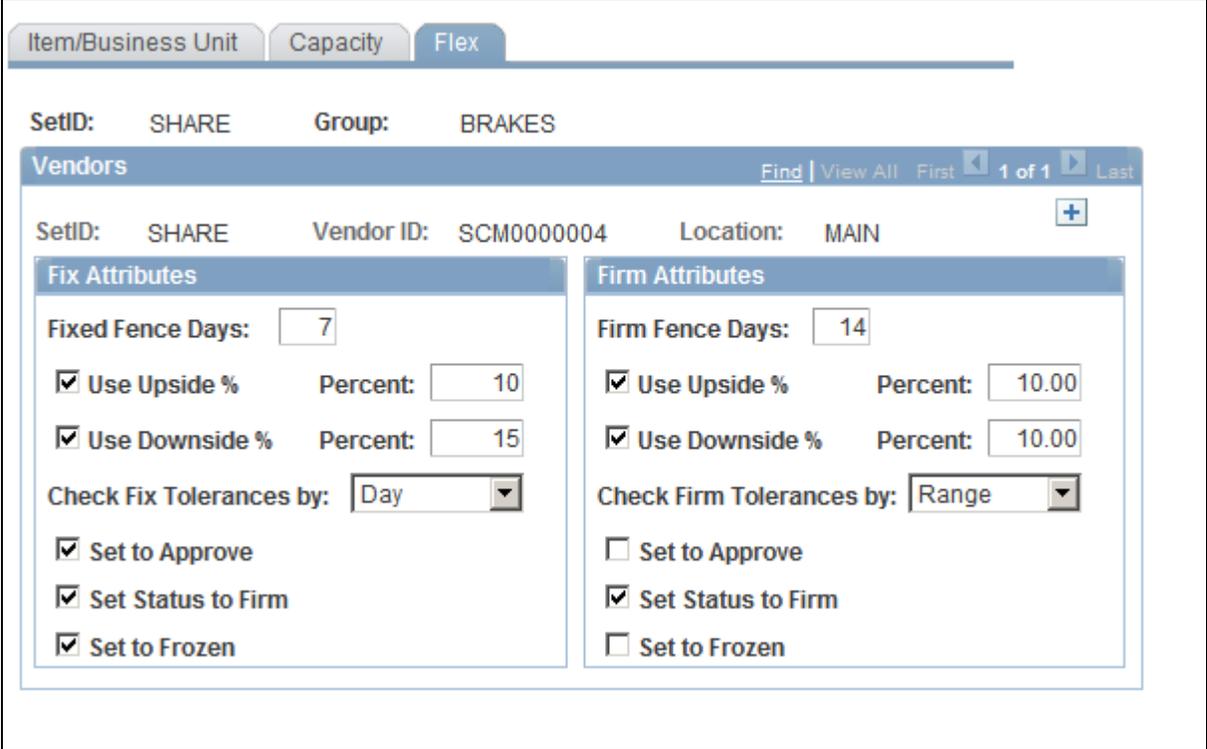
---

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

---

## Defining Fixed or Firmed Attributes

Access the Flex page (Purchasing, Supplier Schedules, Schedule Group, Flex).



Item/Business Unit Capacity Flex

SetID: SHARE Group: BRAKES

Vendors Find | View All First 1 of 1 Last

SetID: SHARE Vendor ID: SCM0000004 Location: MAIN

Fix Attributes	Firm Attributes
Fixed Fence Days: 7	Firm Fence Days: 14
<input checked="" type="checkbox"/> Use Upside % Percent: 10	<input checked="" type="checkbox"/> Use Upside % Percent: 10.00
<input checked="" type="checkbox"/> Use Downside % Percent: 15	<input checked="" type="checkbox"/> Use Downside % Percent: 10.00
Check Fix Tolerances by: Day	Check Firm Tolerances by: Range
<input checked="" type="checkbox"/> Set to Approve	<input type="checkbox"/> Set to Approve
<input checked="" type="checkbox"/> Set Status to Firm	<input checked="" type="checkbox"/> Set Status to Firm
<input checked="" type="checkbox"/> Set to Frozen	<input type="checkbox"/> Set to Frozen

Flex page

### **Fix Attributes and Firm Attributes**

<b>Fixed Fence Days or Firm Fence Days</b>	<p>Fixed: Enter the number of days from the start of the schedule that you consider to be the fixed period.</p> <p>Firm: Enter the number of days after the Fixed period that you consider to be the firm period.</p>
<b>Use Upside % and Percent</b>	<p>Select this check box and enter a percentage that determines the quantity above the baseline quantity that is considered acceptable during the fixed or firm period. If the quantity is changed above this tolerance, a violation is triggered.</p>
<b>Use Downside % and Percent</b>	<p>Select and enter a percentage that determines the quantity below the baseline quantity that is considered acceptable during the fixed or firm period. If the quantity is changed below this tolerance, a violation is triggered.</p>
<b>Check Fix Tolerances by</b>	<p>Select to indicate how to verify the upside or downside percentages. Options are:</p> <ul style="list-style-type: none"> <li data-bbox="597 842 1495 1031"> <p>• <i>Day</i>: The quantity cannot exceed the tolerance specified for any specific day.</p> <p>In the Scheduler's Workbench, the baseline quantity of the prior schedule for each day is compared against the actual quantities for each day to determine violations.</p> </li> <li data-bbox="597 1062 1463 1247"> <p>• <i>Range</i>: The quantity cannot exceed the tolerance for the whole range, regardless of each day's fluctuations.</p> <p>In the Scheduler's Workbench, the baseline quantity of the prior schedule for the range of days is summed and compared against the actual quantities for the range of days to determine violations.</p> </li> </ul>
<b>Set to Approve</b>	<p>Select to approve any planned orders within the fixed or firm period defined during the Apply process. (The Apply link on the Scheduler's Workbench appears after the supplier responds to a schedule). When using a purchase order as the delivery mechanism this enables additional releases against the blanket order while reconciling supplier feedback.</p>
<b>Set Status to Firm</b>	<p>Select to set the planned order status to Firm within the fixed or firm period defined during the Apply process.</p>
<b>Set to Frozen</b>	<p>Select to freeze planned orders within the fixed or firm period defined during the Apply process.</p>

## Defining Schedule Item Information for Collaborative Planning Schedules

To define schedule item attributes, use the Schedule Item Attributes component (ITM\_VND\_INVBU).

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

### Pages Used to Define Schedule Item Information for Collaborative Planning Schedules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Item/Vendor/BU attributes	ITM_VND_BU_ATTR	Purchasing, Supplier Schedules, Schedule Item Attributes, Item/Vendor/BU attributes	<p>Use this page when you intend to maintain schedules at the item level versus group level.</p> <p>Prior to defining schedule attributes for an item, the item must have purchasing attributes as well as Inventory business unit attributes defined.</p> <ol style="list-style-type: none"> <li>1. Define an item as a scheduled item.</li> <li>2. Select the appropriate Inventory business unit.</li> <li>3. Select the Schedule Item option to indicate that this item is available to be used to build a supply schedule.</li> <li>4. Select a Schedule Priority to indicate the priority ranking of the scheduled item.</li> </ol>

#### **See Also**

*PeopleSoft Purchasing 9.1 PeopleBook*, "Defining Purchasing Item Information," Defining Purchasing Item Attributes

## Defining Schedule Item Attributes

Access the Item/Vendor/BU attributes page (Purchasing, Supplier Schedules, Schedule Item Attributes, Item/Vendor/BU attributes).

Item/Vendor/BU attributes

Search Criteria

\*Vendor SetID:  Vendor ID:  Location:

\*Item SetID:  Item ID:

Schedule Group:

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

Vendor SetID	Vendor ID	Vendor Location	SetID	Item ID	Inventory Unit	Group	Capacity	Schedule Item	Schedule Priority
SHARE	SCM0000004	MAIN	SHARE	LT3002	US008	BRAKES	Capacity	<input checked="" type="checkbox"/>	Medium
SHARE	SCM0000004	MAIN	SHARE	LT3003	US008	BRAKES	Capacity	<input checked="" type="checkbox"/>	Medium
SHARE	SCM0000004	MAIN	SHARE	LT3004	US008	BRAKES	Capacity	<input checked="" type="checkbox"/>	Medium

Item/Vendor/BU attributes

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

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

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

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

### Search button

Click to retrieve the information based on the selection criteria.

### Add button

Click this button to add items.

See [Chapter 3, "Using Collaborative Planning Schedules," Adding Individual Items to a Schedule Group, page 31.](#)

### Schedule Item and VMI Item (vendor managed item)

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

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

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

## ***Adding Items***

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

## ***Items Tab***

Select the Items tab.

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

---

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

---

## Creating New Schedules

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

This section lists common elements and discusses how to:

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

## Common Elements Used in This Section

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

## Pages Used to Create New Schedules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Scheduler's Workbench - Selection Criteria	PO_BUY_SEL	Purchasing, Supplier Schedules, Scheduler's Workbench, Selection Criteria	Retrieve schedule data.

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

## Defining Scheduler's Workbench Search Parameters

Access the Scheduler's Workbench - Selection Criteria page (Purchasing, Supplier Schedules, Scheduler's Workbench, Selection Criteria).

Selection Criteria

**Create New Schedule**

\*Create By:  Item  Group

\*Start Date:   \*Number of Periods:

Include PO Data Week starts on:

**Maintain Current Schedules**

Show Approved Schedules with Changes only

**View Past Schedules**

From:   To:

\*Period Duration:

Filter

Vendor: <input type="text"/> <input type="button" value="m"/>	ID: <input type="text"/> <input type="button" value="m"/>
Vendor Location: <input type="text"/> <input type="button" value="m"/>	Buyer/Planner: <input type="text"/> <input type="button" value="m"/>
SetID: <input type="text" value="SHARE"/> <input type="button" value="m"/>	Category: <input type="text"/> <input type="button" value="m"/>
IN Unit: <input type="text"/> <input type="button" value="m"/>	Schedule Priority: <input type="text"/> <input type="button" value="v"/>
Item ID: <input type="text"/> <input type="button" value="m"/>	

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

Pre-Load Capacity/Flex data

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

- Create New Schedule** Select to display a list of items or groups that are available for building a schedule. New schedules can be created for items or groups if no schedules exist with a status of *Current* or *Dispatched*. Any existing schedules in current or dispatched status must be approved by the supplier or deleted by the scheduler before a new schedule can be created.
- Maintain Current Schedules** Select to retrieve schedules for items or groups with the status *Current* (built but not yet dispatched), *Dispatched*, or *Supplier Approved*.  
See [Chapter 3, "Using Collaborative Planning Schedules," Maintaining Current Schedules, page 50.](#)
- Show Approved Schedules with Changes only** Select to retrieve dispatched schedules that have been approved by the supplier including those that may have supplier changes. Once a schedule has been approved by the supplier, the scheduler can use the Apply link to reconcile and update the schedule based on supplier feedback.
- View Past Schedules** Select to view past schedules.  
See [Chapter 3, "Using Collaborative Planning Schedules," Viewing Past Schedules, page 53.](#)

**Filter**

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

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

**Viewing the Scheduler's Workbench List**

Access the Scheduler's Workbench - List page (click the Search button on the Scheduler's Workbench - Selection Criteria page).

Selection Criteria   List   Summary						
Schedule List						
Schedules   Description						
Item ID	IN Unit	Vendor ID	Vendor Name	Vendor Location	Category	Schedule Priority
FR7003	US008	SCM0000004	ERNIE'S-001	MAIN	CYCLING	Medium

Scheduler's Workbench - List page: Schedules tab

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

### Group

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

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

### Item ID

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

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

---

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

---

## Viewing the Scheduler's Workbench Summary Page

Access the Scheduler's Workbench - Summary page (click the item ID or group link on the Scheduler's Workbench - List page).

Selection Criteria
List
Summary

**Vendor ID:** SCM0000004

**Item ID:** FR7003

**Std UOM:** EA

**Status:** New Schedule

**ERNIE'S BIKE SHOP**

Bike Frame, Carbon Fiber

**Period Duration:** Week

**Week starts on:** Tuesday

**Location:** MAIN

**IN Unit:** US008

[Send E-mail](#)

Review/Update your Actual Required Quantity and then click the Build button to create your schedule.

Summary
Customize | [X] | [Grid]

Week 1 - 7
Week 8 - 10
[Left Arrow] [Right Arrow]

	08/07/2009	08/11/2009	08/18/2009	08/25/2009	09/01/2009	09/08/2009	09/15/2009
Actual Required Qty	<a href="#">0.0000</a>						
Previous Required Qty	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Previous Approved Qty	<a href="#">0.0000</a>						
Additional Qty Since Approved	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000

Quantities contain planned orders

Comments

Scheduler's Comment:

Startup schedule carbon frames 4/22

[\[X\] Edit Comments](#)

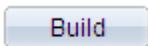
Scheduler's Workbench - Summary page

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

---

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

---



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

See [Chapter 3, "Using Collaborative Planning Schedules," Scheduler's Workbench Row Types, page 22.](#)

**Checking and Calculating Capacity Information**

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

**Calculate Capacity/Flex**

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



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

**Actual Qty** (actual quantity)

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

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

---

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

---

**Date Exceeded**

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

***Calculating Flex Information***

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

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

▼ Flex									
Period:	Fixed	06/09/2005	To:	06/15/2005	Range	Upside %:	5.00	Downside %:	5.00
Flex Details   More Calculations									
Start Date	End Date	Baseline Qty	Actual Qty	Over/Under Flex Qty	Maximum Upside Qty	Minimum Downside Qty			
06/09/2005	06/15/2005	0.0000	50.0000	■	50.0000	0.0000	0.0000		

▼ Flex									
Period:	Firmed	06/16/2005	To:	06/29/2005	Range	Upside %:	10.00	Downside %:	10.00
Flex Details   More Calculations									
Start Date	End Date	Baseline Qty	Actual Qty	Over/Under Flex Qty	Maximum Upside Qty	Minimum Downside Qty			
06/16/2005	06/29/2005	0.0000	200.0000	■	200.0000	0.0000	0.0000		

Calculate Capacity/Flex - Flex grid: Flex Details tab

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

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

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

**Flex Details Tab**

Select the Flex Details tab.

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

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

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

**Baseline Qty** (baseline quantity) The quantity for the given day or range that was approved for the prior schedule.

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

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

### **More Calculations Tab**

Select the More Calculations tab.

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

## **Editing and Viewing Actual Item or Group Quantities**

Access the Scheduler's Workbench - Summary page (click the item ID or group link on the Scheduler's Workbench - List page) and click an Actual Required Qty bucket for one of the periods in the schedule. This expands the details for the quantity bucket below the summary page.

Item Detail - Actual Required Qty group box

---

**Note.** These columns are visible only for groups.

---

**IN Unit and Item**

These fields are used to filter the details to display only one particular item (from within the group) and its related information. In addition, these values can be used as defaults when adding new planned orders into the grid for a specific Inventory business unit or item.

**Total Quantity**

This display-only field reflects the total quantity for the specific Inventory unit and the item.

**Refresh button**

This button uses the filters entered (IN Unit and Item) to filter the rows that show appear in the detail section. It also refreshes the total quantity for the specific time period and based on the IN Unit and Item values.

***Schedule Navigation and Updates***

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

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

---

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

---

***Date/Qty Details Tab***

Select the Date/Qty Details tab.

**PO No.**

Displays the purchase order ID that you include in the schedule. For a planned purchase order, the order ID will be blank, and the Type column will be *New*.

**Due Date, Time Due, and Quantity**

Enter values for these fields.

<b>Frozen</b>	If this check box is selected, then the order or operation is frozen, and Supply Planning does not automatically reschedule the line.
<b>Approved</b>	If this check box is selected, the planned PO is approved and is ready to be converted to a purchase order. (Behaves the same as if you had approved the line on the Receive Purchase Messages page.)
<b>Plan Status</b>	<p>The status of the planned purchase order. Options are <i>Canceled</i>, <i>Firmed</i>, and <i>Planned</i>. If you add a new planned purchase order, the default value is <i>Planned</i>. If the row is a PO, this field is blank.</p> <p>If the status of a planned order is <i>Canceled</i>, Supply Planning deletes the order during the next planning cycle and prevents the row from appearing in the workbench. If the status of a planned order is <i>Firmed</i>, Supply Planning retains the planned purchase order.</p>

### **Vendor Tab**

Select the Vendor tab.

#### **Vendor ID and Vendor Location**

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

### **Description Tab**

Select the Description tab.

---

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

---

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

### **Configuration Code Tab**

Select the Configuration Code tab.

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

## **Reviewing Previous Approved Quantities**

Access the Scheduler's Workbench - Summary page (click the item ID or group link on the Scheduler's Workbench - List page) and click a Previous Approved Quantity bucket for a period.

Item Detail - Previous Approved Qty

Start Date: 08/07/2009    End Date: 08/13/2009    Period Duration: Week    << >>

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

Planned and Scheduled Purchases    Customize | Find | View All | 1 of 1 | First | Last

Date/Qty Details    PO Details    <>

Type	PO No.	Original Due Date	Original Due Time	*Due Date	Time Due	Current Standard Quantity	Confirmed Standard Quantity
New				08/07/2009	12:00:00AM	0.0000 EA	0.0000 EA

Comments

Scheduler's Comment: Startup schedule carbon frames 4/22    [Edit Comments](#)

Item Detail - Previous Approved Qty group box

### ***Date/Qty Details Tab***

Select the Date/Qty Details tab.

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

### ***PO Details Tab***

Select the PO Details tab.

The system displays PO information regarding the schedule.

## **Building a Supply Schedule**

Access the Build Schedule Options page (click the Build button or the Rebuild button on the Scheduler's Workbench - Summary page).

Build Schedule Options			
Vendor ID:	SCM0000004	Location:	MAIN
Item ID:	FR7003		Bike Frame, Carbon Fiber
		include PO Data:	<input checked="" type="checkbox"/>
		Week starts on:	Thursday
Start Date:	06/09/2005		
End Date:	08/17/2005		
Dispatch Flag:	<input type="checkbox"/>	Dispatch Email Address:	
	<input type="radio"/> Email	Scheduler Email Address:	peoplesoft@peoplesoft.com
	<input checked="" type="radio"/> Other		
View Only Schedule:	<input type="checkbox"/>		

### Build Schedule Options page

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

#### Dispatch Flag

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

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

#### Dispatch Email Address

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

#### Scheduler's Email Address

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

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

## Sending Email to Internal Employees or to Suppliers

Access the Email Message page (click the Send E-mail link on the Scheduler's Workbench - Summary page).

#### Email Subject

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

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

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

**See Also**

[Appendix A, "Delivered Workflows for Collaborative Supply Management," page 79](#)

---

## Maintaining Current Schedules

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

This section discusses how to:

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

## Pages Used to Maintain Current Schedules

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Scheduler's Workbench - Selection Criteria	PO_BUY_SEL	Purchasing, Supplier Schedules, Scheduler's Workbench, Selection Criteria	Retrieve current schedule data by selecting the Maintain Current Schedules option.
Scheduler's Workbench - List	PO_BUY_LIST	Purchasing, Supplier Schedules, Scheduler's Workbench, List	View all the schedules that match the criteria.
Scheduler's Workbench - Summary	PO_BUY_ITEM_SUM	Click the link for an item ID or group on the Scheduler's Workbench - List page.	View, edit, and rebuild a schedule.
Comments	PO_BUY_ITM_COMMENT	Click the Edit Comments or Previous Comments link on the Scheduler's Workbench - Summary page.	View or edit comments. Both the scheduler and supplier can use this page.

Page Name	Definition Name	Navigation	Usage
Build Schedule Options	PO_BUILD_RUN_SP	Click the Build button or the Rebuild button on the Scheduler's Workbench - Summary page.	Build and dispatch a schedule.
Email Message	WV_PE_EMAIL	Click the Send E-mail link on the Scheduler's Workbench - Summary page.	Send an email message to the supplier or to internal employees.

## Viewing the Item Summary Row Types for a Current Schedule

Access the Scheduler's Workbench - Summary page (click the link for an item ID or group on the Scheduler's Workbench - List page).

A current schedule can have these statuses:

- Current
- Dispatched
- Supplier Approved

See [Chapter 3, "Using Collaborative Planning Schedules," Scheduler's Workbench Row Types, page 22.](#)

## Reviewing Current Required Quantities

Access the Scheduler's Workbench - Summary page (click the link for an item ID or group on the Scheduler's Workbench - List page). Click one of the current required quantities.

The screenshot shows a software interface window titled "Item Detail - Current Required Qty". At the top, it displays "Start Date: 04/22/2001", "End Date: 04/28/2001", and "Period Duration: Week". There are checkboxes for "Show Vendor Qty/UOM Columns" and "Show Order Qty/UOM Columns". Below this is a section for "Planned and Scheduled Purchases" with a table. The table has columns for "Type", "PO No.", "Original Due Date", "Original Due Time", and "Current Standard Quantity". The data rows are as follows:

Type	PO No.	Original Due Date	Original Due Time	Current Standard Quantity	
New		04/26/2001	4:00PM	35.0000	EA
New		04/26/2001	4:00PM	35.0000	EA
New		04/27/2001	7:30AM	30.0000	EA
New		04/27/2001	2:00PM	25.0000	EA

Item Detail - Current Required Qty

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

**Current Standard Quantity** Displays the current required quantity based on the standard UOM.

## Reviewing and Editing Current Approved Quantities

Access the Scheduler's Workbench - Summary page (click the link for an item ID or group on the Scheduler's Workbench - List page). Click one of the links for current approved quantities.

---

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

---

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

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

## Rebuilding Schedules

Access the Scheduler's Workbench - Summary page (click the link for an item ID or group on the Scheduler's Workbench - List page).

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

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

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

## Dispatching Supply Schedules

Access the Dispatch Schedule Options page.

**OK** button Click to dispatch the schedule.

**Cancel** Click to cancel dispatching the schedule.

See [Chapter 3, "Using Collaborative Planning Schedules," Building a Supply Schedule, page 48.](#)

---

## Viewing Past Schedules

This section discusses how to review past quantities.

### Pages Used to View Past Schedules

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

### Reviewing Past Quantities

Access the Scheduler's Workbench - Summary page (click the link for an item ID or group on the Scheduler's Workbench - List page). Click the link for a previous approved quantity.

---

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

---



---

## Building Multiple Schedules

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

### Page Used to Build Multiple Schedules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Build Schedule	PO_BUILD_COLLAB	Purchasing, Supplier Schedules, Build Schedules, Build Schedule	Build multiple schedules based on selection criteria and, if you want, dispatch the schedules.

## Running the Build Multiple Supply Schedules Process

Access the Build Schedule page (Purchasing, Supplier Schedules, Build Schedules, Build Schedule).

### Build Schedules

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

Language:

Create By:  Item  Group

SetID:  Item ID:

IN Unit:  Category:

Vendor SetID:  Vendor ID:  Location:

Scheduler Email Address:

#### Schedule Parameters

Schedule Start:  days from today      From Date: 08/07/2009

Number of Periods:

Period Duration:       To Date: 10/31/2009

Week starts on:       Include PO Data:

#### Dispatch Parameters

Dispatch      Email Address:

Email       Other

View Only Schedule

Build Schedule page

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

### **Schedule Parameters**

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

**From Date**      Displays the starting date of the schedule. The system calculates this date by adding the value in the Schedule Start field to the current date.

**Number of Periods**      Enter the number of periods in the schedule. The maximum number is 52.

<b>Period Duration</b>	Select the length of time used to establish the periods. Values are <i>Day</i> , <i>Week</i> (the default), and <i>Month</i> . When you specify the number of periods, the system uses this duration.
<b>To Date</b>	Displays the last date for which the system collects schedule data. The system calculates this date based on the values for number of periods, period duration and from date.
<b>Include PO Data</b> (include purchase order data)	Select to have the system include both purchase order data and planned purchase order data. If the check box is deselected, only planned purchase order data is included in the schedule.

### ***Dispatch Parameters***

Select the parameters for dispatching the schedule.

See [Chapter 3, "Using Collaborative Planning Schedules," Dispatching Supply Schedules, page 52.](#)

## **Dispatching Multiple Supply Schedules**

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

### **Page Used to Dispatch Multiple Supply Schedules**

<b><i>Page Name</i></b>	<b><i>Definition Name</i></b>	<b><i>Navigation</i></b>	<b><i>Usage</i></b>
Dispatch Schedule	PO_BUILD_COLLAB	Purchasing, Supplier Schedules, Dispatch Schedules, Dispatch Schedule	Dispatch multiple schedules to the supplier. Display all the schedules that are pending dispatch.

### **Running the Dispatch Multiple Supply Schedules Process**

Access the Dispatch Schedule page (Purchasing, Supplier Schedules, Dispatch Schedules, Dispatch Schedule).

## Dispatch Schedules

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

Language:

Create By:  Item  Group

SetID:  Item ID:

IN Unit:  Category:

Vendor SetID:  Vendor ID:  Location:

Scheduler Email Address:

Schedules to be dispatched [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

Item ID	Group	IN Unit	Vendor SetID	Vendor Name	Location

Dispatch Parameters

Method:  Email  Other

Email Address:

View Only Schedule

Dispatch Schedule page

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

### **Dispatch Parameters**

#### **Method**

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

#### **Email Address**

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

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

## Deleting Past Schedules

This section discusses how to run the Delete Past Schedules (PO\_BLD CLEAN ) process.

### Page Used to Delete Past Schedules

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

### Running the Delete Past Schedules Process

Access the Delete Schedules page (Purchasing, Supplier Schedules, Delete Schedules, Delete Schedules).

### Delete Schedules

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

Language:

Create By:  Item  Group

SetID:  Item ID:

IN Unit:

Vendor SetID:  Vendor ID:  Location:

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

Delete schedules older than  days Earlier than:

Delete Schedules page

#### Delete schedules older than ... days

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

---

## Enabling Suppliers to View Dispatched Schedules

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

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

### **See Also**

[Appendix A, "Delivered Workflows for Collaborative Supply Management," page 79](#)

---

## Enabling Suppliers to Update and Approve Schedules

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

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

## Understanding Supply Schedule Approval

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

---

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

---

A supplier can:

- See the schedule in a similar format as the scheduler.
- View any capacity or flex information for the latest schedule.

- Change the approved quantities, due dates and/or times within the schedule.
- Approve a schedule which creates an email response to the scheduler.
- Enter comments.
- Send email.
- View recently dispatched schedules from the scheduler.

A supplier cannot:

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

## Pages Used to Enable Suppliers to Update and Approve Schedules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Approve Schedules - Select Vendor	WV_SS_VND_LIST	Manage Supply, Approve Schedules, Select Vendor	Select the vendor for whom the schedule is maintained.  A supplier clicks a vendor name to access the Filter Options page and enter search criteria for the schedule item. If only one vendor ID is associated with the user ID, the Select Vendor page does not appear. Instead, the supplier accesses the Filter Options page directly.
Approve Schedules - Filter Options	PO_BUY_SEL	<ul style="list-style-type: none"> <li>• Manage Supply, Approve Schedule, Selection Criteria</li> <li>• Click a vendor ID link on the Select Vendor page. If the user is associated to only one vendor, the user will go directly to Filter Options page.</li> </ul>	Narrow the list of items for which the supplier maintains a schedule.  Define selection criteria to determine the type of schedule (current or past) to review.
Approve Schedules - Schedule/Item List	PO_SS_COLLITM_LIST	Select Maintain Current Schedule on the Filter Options page then click Search.	View all the items that have been dispatched from the scheduler and those that were previously approved.
Approve Schedules - Summary	PO_BUY_ITEM_SUM	Click an Item ID or Group link on the Schedule List page	View, edit and approve a schedule.

Page Name	Definition Name	Navigation	Usage
Approve Schedules - Comments	PO_BUY_ITM_COMMENT	<p>Click the Edit Comment link on the Summary page to maintain or add new comments.</p> <p>Click the Previous Comments link on the Item summary page to view comments from the previous schedule.</p>	View or edit the comments. Both the scheduler and the scheduler can use this page.

## Defining Approve Schedules Search Parameters

Access the Approve Schedules - Filter Options page (Manage Supply, Approve Schedule, Filter Options).

**Note.** This component is used for suppliers only.

**Approve Schedules**

---

**Filter Options**

ERNIE'S BIKE SHOP

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

Search Criteria

**Maintain Current Schedules**

Show new schedules only

**View Past Schedules**

From:  To:

\*Period Duration:

Filter

Inventory Business Unit:  Group:

Category:

Vendor Item ID:  Vendor Location:

Item ID:  Schedule Priority:

UOM to View Quantities:

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

Pre-Load Capacity/Flex data

[Return to Vendor List](#)

Approve Schedules - Filter Options page (supplier)

**Maintain Current Schedules** Select to display a list of schedules with the status *New* or *Approved*.

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

## Maintaining a Supplier's Current Schedules

Access the Approve Schedules - Schedule/Item List page (click Search after selecting Maintain Current Schedule on the Filter Options page).

**Approve Schedules**  
**Schedule/Item List**  
 ERNIE'S BIKE SHOP

[Set filter options](#) [Return to Vendor List](#)

**Schedule List** Customize | Find | View All | First 1-2 of 2 Last

Schedules **Details** [\[EFP\]](#)

Item ID	Group	Description	Dispatched Date/Time	Status	Vendor Location	Ship To
	<a href="#">BRAKES</a>	Bike Brakes	06/12/2003 4:14:28PM	New	MAIN	
<a href="#">FR7002</a>		Bike Frame, Aluminium	04/13/2001 9:16:02AM	New	MAIN	COLORADO BIKE MFG/OUTDOOR

Approve Schedules - Schedule/Item List page (supplier)

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

## Viewing the Item Summary Row Types for New Schedules

Access the Approve Schedules - Item Summary page (click an Item ID or Group link on the Approve Schedules - Schedule/Item List page).

**Approve Schedules**

---

**Item Summary**

ERNIE'S BIKE SHOP

Item ID: FR7002      Bike Frame, Aluminium  
 Location: MAIN      Ship To: COLORADO BIKE MFG/OUTDOOR  
 Status: New Schedule  
 Qty's Shown in: Vendor Default UOM      EA  
 Period Duration: Week      Week starts on: Sunday

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

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

Summary							
	04/16/2001	04/22/2001	04/29/2001	05/06/2001	05/13/2001	05/20/2001	05/27/2001
Previous Required Qty	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Previous Approved Qty	<a href="#">0.0000</a>						
Additional Qty Since Approved	<a href="#">125.0000</a>	<a href="#">125.0000</a>	<a href="#">125.0000</a>	<a href="#">200.0000</a>	<a href="#">200.0000</a>	<a href="#">200.0000</a>	<a href="#">200.0000</a>
Current Required Qty	125.0000	125.0000	125.0000	200.0000	200.0000	200.0000	200.0000
Pending Approval Qty	<a href="#">125.0000</a>	<a href="#">125.0000</a>	<a href="#">125.0000</a>	<a href="#">200.0000</a>	<a href="#">200.0000</a>	<a href="#">200.0000</a>	<a href="#">200.0000</a>
Shortage/Overage	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Short/Over Rolling	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000

Approve Schedules - Item Summary page (supplier 1 of 2)

[Quantities](#) contain planned orders

Comments

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

Supplier's Comment:

Disclaimer: Schedule forecast is not a commitment to buy.

Approve Schedules - Item Summary page (supplier 2 of 2)

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

See Chapter 3, "Using Collaborative Planning Schedules," Scheduler's Workbench Row Types, page 22.

## Editing and Viewing Pending Approval Quantities

Access the Approve Schedules - Summary page (click an Item ID or Group link on the Schedule List page). Click a link for a pending approval quantity.

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

**Approve Schedules**

---

**Item Summary**

ERNIE'S BIKE SHOP

Item ID: FR7002      Bike Frame, Aluminium  
 Location: MAIN      Ship To: COLORADO BIKE MFG/OUTDOOR      [Send E-mail](#)  
 Status: New Schedule      [Return to Schedule List](#)  
 Qty's Shown in: Vendor Default UOM      EA      [Approve](#)  
 Period Duration: Week      Week starts on: Sunday

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

Summary							
Week 1 - 7		Week 8 - 10					
	04/16/2001	04/22/2001	04/29/2001	05/06/2001	05/13/2001	05/20/2001	05/27/2001
Previous Required Qty	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Previous Approved Qty	<a href="#">0.0000</a>						
Additional Qty Since Approved	<a href="#">125.0000</a>	<a href="#">125.0000</a>	<a href="#">125.0000</a>	<a href="#">200.0000</a>	<a href="#">200.0000</a>	<a href="#">200.0000</a>	<a href="#">200.0000</a>
Current Required Qty	125.0000	125.0000	125.0000	200.0000	200.0000	200.0000	200.0000
Pending Approval Qty	<a href="#">125.0000</a>	<a href="#">125.0000</a>	<a href="#">125.0000</a>	<a href="#">200.0000</a>	<a href="#">200.0000</a>	<a href="#">200.0000</a>	<a href="#">200.0000</a>
Shortage/Overage	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Short/Over Rolling	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000

Supplier Item Detail Pending Approval Qty group box (1 of 2)

[Quantities](#) contain planned orders

Comments

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

Supplier's Comment:

Disclaimer: Schedule forecast is not a commitment to buy.

Supplier Item Detail Pending Approval Qty group box (2 of 2)

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

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

## Calculating Capacity Information (Suppliers)

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

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

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



This red box denotes that there is a violation.

**Actual Qty** (actual quantity) This column displays the pending approval quantity values for the specific range. This compares the defined capacity quantity against the actual data.

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

## Calculating Flex Information (Suppliers)

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

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

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

### ***Flex Details Tab***

Select the Flex Details tab.

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

---

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

---

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

<b>Baseline Qty</b> (baseline quantity)	The quantity for the given day or range that was approved for the last schedule.
<b>Actual Qty</b> (actual quantity)	The pending approval quantity for the given day or range.
<b>Over/Under Flex Qty</b> (over or under flex quantity)	<p>This column will display the difference between the actual quantities and the baseline quantity <math>\pm</math> Flex upside or downside quantity (quantity over or under the flex).</p> <p>This value is highlighted if the Flex has been exceeded for fixed or firmed ranges. This value indicates how far over or under the acceptable flex quantity the buyer is for that specific date. This value is 0 if the buyer is within the flex tolerance quantity. This value is useful to indicate the quantity that needs to be adjusted to meet flex requirements.</p>
<b>Maximum Upside Qty</b> (maximum upside quantity)	This quantity is the <i>total</i> acceptable upside quantity for the day or fixed or firmed range, based on setup options. This quantity is calculated based on the baseline value + the % upside $\times$ the baseline value. This value will be displayed independent of a violation and is useful to see the total maximum quantity that can be ordered.
<b>Minimum Downside Qty</b> (minimum downside quantity)	This quantity is the <i>total</i> acceptable downside quantity for the day or fixed or firmed range, based on setup options. This quantity is calculated based on the baseline value – the % downside $\times$ the baseline value. This value displays independent of a violation and is useful to see the total minimum quantity that should be ordered.
 <b>More Calculations Tab</b>	
Select the More Calculations tab.	
<b>Upside (Delta) Qty</b> (upside delta quantity)	This column displays the <i>delta</i> acceptable upside quantity for the day or fixed or firmed range, based on setup options. This quantity is calculated based on the maximum quantities – actual quantities. This quantity is useful to determine if additional quantities can be ordered.
<b>Downside (Delta) Qty</b> (downside delta quantity)	This column displays the <i>delta</i> acceptable downside quantity for the day or fixed or firmed range, based on setup options. This quantity is calculated based on the actuals quantities – minimum quantity. This quantity is useful to determine if fewer quantities can be ordered.
<b>Over/Under Baseline %</b>	<p>This column displays the current over or under percentage based on actuals versus baseline. For example, if the baseline quantity is 100, and actual quantity is 105, then the percentage is 5. This percentage is useful for the buyer to see how much flex is being utilized based on actuals.</p> <p>When the actual quantities are equal to the baseline quantities, this value is zero.</p>

## Confirming Approvals (Suppliers)

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

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

---

## Viewing Past Schedules

This section discusses how to review previous approved quantities.

### Pages Used View Past Schedules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Approve Schedules - Select Vendor	WV_SS_VND_LIST	Manage Supply, Approve Schedules	Select the vendors whose Kanban requests you want to review.
Approve Schedules - Filter Options	PO_BUY_SEL	<ul style="list-style-type: none"> <li>Manage Supply, Approve Schedules, Filter Options</li> <li>Click a vendor ID link on the Approve Schedules - Select Vendor page. If the user is associated to only one vendor, this link goes directly to the Filter Options page.</li> </ul>	Narrow the list of schedules for which the supplier maintains a schedule.
Approve Schedules - Schedule/Item List	PO_SS_COLLITM_LIST	Select the View Past Schedules button, enter a date range, and click the Search button on the Filter Options page.	View all the schedules with a status of <i>Previous</i> or <i>History</i> .
Approve Schedules - Item Summary	PO_BUY_ITEM_SUM	Click an Item ID or Group link on the Approve Schedules - Schedule/Item List page.	View past schedules.

## Reviewing Previous Approved Quantities

Access the Approve Schedules - Schedule/Item List page (select the View Past Schedules button, enter a date range, and click the Search button on the Filter Options page). Click the link for a previous approved quantity.

---

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

---

## Applying Collaborative Changes (Scheduler)

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

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

### Common Elements Used in This Section

<b>Calculate</b>	Click to calculate the new Proposed Apply quantity for the affected row types. The system does not update the data until you click the Update button.
<b>Update</b>	Click to update the quantities on the Scheduler's Workbench - Summary page for the affected Required Actual Quantity (planned orders). Actual quantities are updated to match the Proposed Apply quantities.
	<hr/> <b>Note.</b> The Update button can be clicked only once within Apply mode for a schedule. <hr/>
<b>Apply</b>	Click this link next to an schedule with the status <i>Supplier Approved</i> on the Scheduler's Workbench - List page. After you apply the changes, the link is no longer visible on the item list.
<b>Total Quantity</b>	Displays the running total based on the selected action, planning status, the actual (or live) data quantity or the collaborated quantity. If the action is <i>Collab</i> , the collaborated quantity is used. If the action is <i>Ignore</i> or the planning status is <i>Canceled</i> , no quantity is added to the total. The Total Quantity field is updated when you click the Calculate button after modifying any proposed quantities in the detail page.

<b>Chg (change)</b>	Rows marked as Chg (change) are used to identify which rows have changes since the initial schedule was dispatched to the supplier. Displays whether a change has taken place in the quantity or date and time by the supplier, scheduler, or planning since the schedule was dispatched.
<b>Quantity</b>	Represents the quantity used for the actual data. If the planning status is not <i>Canceled</i> , the quantity cannot be 0.  You can change this quantity for PO-related lines to reflect related impact on the schedule. However, purchase order changes are always made manually.
<b>Collab Due Date</b> (collaborated due date)	Displays the due date of the collaborative quantity.
<b>Collab Time Due</b> (collaborated time due)	Displays the time due of the collaborative quantity.
<b>Collaborated Qty</b> (collaborated quantity)	Displays the agreed upon or proposed quantity changes from the supplier.

## Pages Used to Apply Collaborative Changes

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

## Reviewing and Modifying the Proposed Apply Quantity

Access the Scheduler's Workbench - Summary page (click the Apply link for a schedule with the status *Supplier Approved* on the Scheduler's Workbench - List page).

This page enables you to:

- Review the changes that the supplier suggested in line with any actual (or live) data for the schedule.
- Review impact on capacity and flex in relation to the proposed quantity as well as actual quantities.

- Modify the data and track the cumulative impact on the schedule (that is, perform what-if scenarios) without affecting the actual underlying planned orders.

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

To review and modify proposed apply quantity:

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

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

---

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

---

### Action

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

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

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

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

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

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

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

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

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

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

---

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

---

See [Chapter 3, "Using Collaborative Planning Schedules," Defining Fixed or Firmed Attributes, page 32.](#)

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

<b>Actual Data</b>	<b>Collaborated Data</b>	<b>Default Action</b>	<b>Notes</b>
No change in actual data.	No change in collaborated data.	<i>Actual</i>	No changes made by scheduler or supplier, so the system leaves the data intact.
No change in actual data.	Change in collaborated data.	<i>Collab</i>	The system applies the supplier changes to the schedule.
Change in actual data.	No change in collaborated data.	<i>Actual</i>	The actual planned orders changed because the schedule was dispatched. The system keeps the actual planned orders intact.
Change in actual data.	Change in collaborated data (excluding date changes).	<i>Actual</i>	The actual planned orders changed because the schedule was dispatched. The system keeps the actual planned orders intact and disregards the supplier's changes

<b>Actual Data</b>	<b>Collaborated Data</b>	<b>Default Action</b>	<b>Notes</b>
Changes in actual data.	Change in collaborated data (date changes).	<i>Actual</i> and <i>Collab</i>	Two rows appear: one with the action <i>Actual</i> for the changes on the actual side and the other with the action <i>Collab</i> for the changes on the supply side. The system keeps track of both changes, because both changes may be important, and they may need to be reconciled.
Add a new planned purchase order.	Not applicable.	<i>Actual</i>	The new planned order was added because the schedule was dispatched. The system keeps the actual planned order.
Not applicable.	Add a new planned purchase order.	<i>Collab</i>	Supplier suggested a new quantity. The system applies supplier's changes to the schedule.

### **Performance Considerations**

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

<b>Field</b>	<b>Value</b>
Index	A
Type	User
Uniq	N
Clust	N
Custom Order	Y
Platfm	All
Key Fields	
BUSINESS_UNIT_IN	Asc

<b>Field</b>	<b>Value</b>
SEQ_NBR	Asc

See *PeopleTools PeopleBook: PeopleSoft Application Designer*

## Chapter 4

# Using Collaborative Supply Management Pagelets

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

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

---

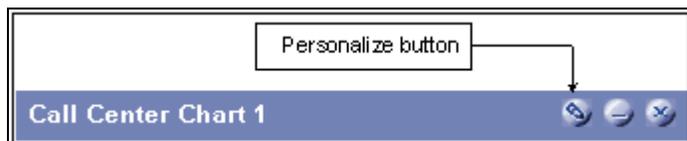
## Understanding Collaborative Supply Management Pagelets

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

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

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

Some pagelets support personalization; the Personalize button in the pagelet title bar alerts the suppliers to this capability. The following figure show a sample pagelet with a Personalize button. Click the button to access the personalization page.



Personalize button on a pagelet

## Pagelet Security

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

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

---

## Pagelets by Role

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

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

- Supplier - Application Administrator
- Supplier - Production Manager

---

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

---

### Supplier - Applications Administrator Pagelets

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

- Recently Dispatched Schedules
- Remaining Quantity Balances

### Supplier - Production Manager

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

- Recently Dispatched Schedules
- Remaining Quantity Balances

## Personalizing Supplier-Facing Pagelets

This section discusses how to personalize user defaults.

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

### Pages Used to Personalize Supplier-Facing Pagelets

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

### Personalizing User Defaults

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

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

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

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

## Viewing Collaborative Supply Management Pagelets

This section provides information about Collaborative Supply Management pagelets.

### Pagelets Used to View Collaborative Supply Management Information

This table provides details on Collaborative Supply Management pagelets.

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

## Recently Dispatched Schedules Pagelet

Displays the most recently dispatched schedules.

Recently Dispatched Schedules			
ERNIE'S BIKE SHOP			
Item ID	Group	Dispatched Date/Time	Status
	<a href="#">BRAKES</a>	06/12/2003 4:14:28PM	New
<a href="#">FR7001</a>		10/31/2001 9:53:33AM	Supplier Approved
<a href="#">FR7002</a>		04/13/2001 9:16:02AM	New
<a href="#">Show all/Enhanced...</a>			

Recently Dispatched Schedules pagelet

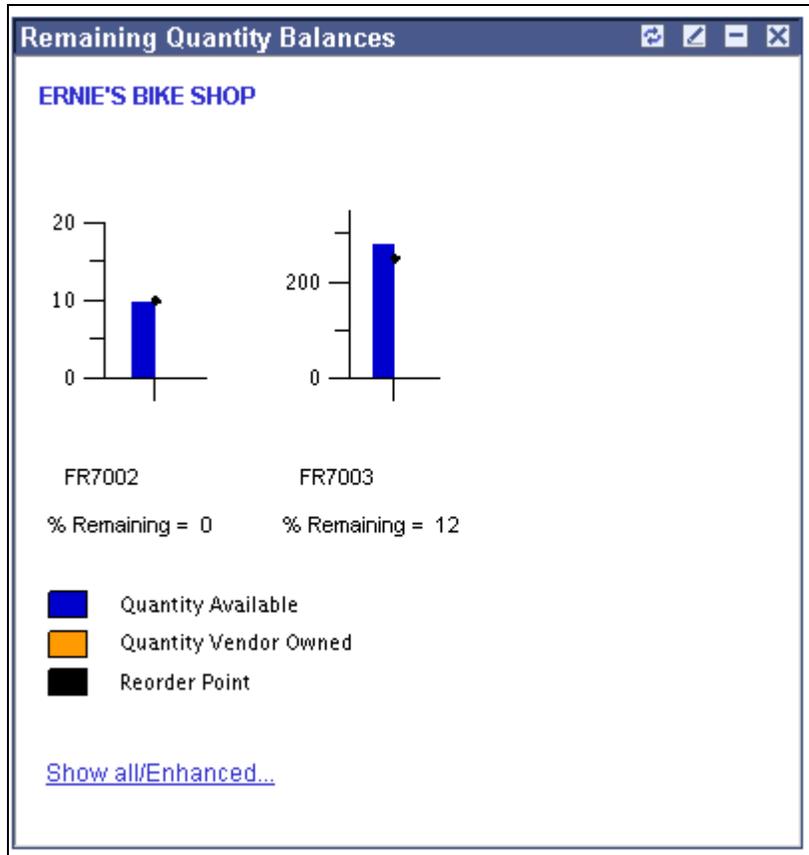
### Show all/Enhanced

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

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

## Remaining Quantity Balances Pagelet

Displays the Remaining Quantity Balances.



Remaining Quantity Balances pagelet

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

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

**% Remaining**

Percentage remaining, derived by:

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

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

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

**Show all/enhanced**

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

## Appendix A

# Delivered Workflows for Collaborative Supply Management

This appendix discusses delivered workflows for Collaborative Supply Management.

### **See Also**

*PeopleTools PeopleBook: Workflow Technology*

---

## Delivered Workflows for Collaborative Supply Management

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

### **PO Supplier Change**

The section discusses the PO Supplier Change workflow.

#### **Description**

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

#### **Workflow Objects**

<b>Event</b>	PO_SUPPLIER_COLLAB
<b>Workflow Action</b>	PO_SUPPLIER_COLLAB

<b>Role</b>	Buyer
-------------	-------

## PO Supplier Schedule Dispatch

The section discusses the PO Supplier Schedule Dispatch workflow.

### *Description*

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

### *Workflow Objects*

<b>Event</b>	PO_SUPPLIER_COLLAB
<b>Workflow Action</b>	PO_SUPPLIER_COLLAB
<b>Role</b>	Supplier

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