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PeopleSoft

PeopleSoft FSCM 9.2: PeopleSoft Managing Items

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Contents

Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	Description
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For **Alt+W,** hold down the **Alt** key while you press the **W** key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

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

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

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

• Asia Pacific

• Europe

• Latin America

• North America

Industry Identifiers

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

• USF (U.S. Federal)

• E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.

- Managing hosted Online Help.

- Managing locally installed PeopleSoft Online Help.

PeopleSoft FSCM Related Links

Oracle Help Center

Hosted Online Help

PeopleSoft Information Portal

My Oracle Support

Financial and Supply Chain Management information for Search Framework search engine can be found in PeopleSoft Application Fundamentals documentation. For application specific information, see the "Understanding Keyword Search within Components " (Application Fundamentals) topic.

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

PeopleSoft Spotlight Series

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you're using.

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Chapter 1

Getting Started with PeopleSoft Managing Items PeopleBook

Managing Items Overview

The PeopleSoft Managing Items product documentation includes these topics:

- Working with items.

- Defining item control values.

- Defining items by SetID.

- Defining items by business unit.

- Loading items.

- Using item catalog maintenance.

- Using group purchase organizations.

- Listing delivered workflow.

- Generating PeopleSoft item reports.

Implementing Items for PeopleSoft

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

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

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

Component	Component Interface	Reference
Master Item Load Component Integration	IN_MST_ITEM_XLS	See "PeopleSoft SCM Inbound EIPs" (PeopleSoft Supply Chain Management Integration).
Master Item Supplier Load Component	IN_VND_ITEM_XLS	See "PeopleSoft SCM Inbound EIPs" (PeopleSoft Supply Chain Management Integration).
Item Groups	INV_ITEM_GROUPS_CI	See Item Groups Page.
Stocking Periods	STOCK_PERIOD_CI	See Stocking Periods Page.
Units of Measure	INV_ITEM_UOM	See Units of Measure Page.
Universal Item Identifier	ITM_MFG_UPN_CI	See Universal Item Identifiers Page.
Automatic Serial Numbers	AUTO_SERIAL_NUM_CI	See Assigning Serial Numbers Automatically.

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* product documentation with information about where to find the most current version of each.

See the product documentation for *PeopleTools: PeopleSoft Component Interfaces*.

Pages With Deferred Processing

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

See the product documentation for *PeopleTools: PeopleSoft Application Designer Developer's Guide*.

Common Elements Used in Managing Items

Field or Control	*Description*
Description	Free-flow text up to 30 characters.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row. See *PeopleTools: PeopleSoft Applications User's Guide*
Language or **Language Code**	The language in which you want the field labels and report headings of the reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Process Frequency (group box)	Designates the appropriate frequency in the **Process Frequency** group box: *Once* executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to *Don't Run.* *Always* executes the request every time the batch process runs. *Don't Run* ignores the request when the batch process runs.
Process Monitor	This link takes you to the Process List page, where you can view the status of submitted process requests.
Report ID	The report identifier.
Report Manager	This link takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which give you a description of the report and the distribution list).
Recipient's	Select to have a report print in the language defined for the recipient of the report.
Request ID	A request identification that represents a set of selection criteria for a report or process.

Field or Control	Description
Run	Click this button to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format. See *PeopleTools: PeopleSoft Process Scheduler*
Run Control ID	Each run control you create receives a unique run control ID. When you select a process from a menu, a search dialog box appears, asking for a run control ID. If you are in Add mode, enter a new ID for the run control you are about to define. If you are in Update/Display mode, enter an existing run control ID or press Enter and select from the list of available run control IDs.
Short Description	Free-flow text up to 15 characters.
Specified	Select to have a report print in the language that you specify in the **Language** field.
Status	The options in this field are *Active* or *Inactive.* By linking status and effective date, you can retain historical information and plan future implementation. For auditing purposes, PeopleSoft encourages inactivating data that is no longer in use instead of deleting it.
User ID	The system identifier for the individual who generates a transaction.

Chapter 2

Working with Items

Accessing Item ID Navigational Features

This topic discusses how to access Item ID navigational features

Pages Used to Access Item ID Navigational Features

Page Name	Definition Name	Usage
Item Search Criteria Page	ITEM_SEARCH_SP	Increase the search speed for the item and product IDs when you process inventory movements, sales orders, and material stock requests.
Item Supplier Priority Page	ITM_VNDR_PRTY_HC	View a list of suppliers that are already established as suppliers of the item that you want to order. This page can help you make decisions about where to place an order for an item. Item Search Criteria Page

Using Zero Fill Functionality

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

Entering New Item IDs Quickly

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

- Create/Update Stock Request (EZ_ISSUE_INV) component.

- Define Par Location (CART_REPLEN_OPT) component.

- Express Putaway (PUTAWAY_ENTRY1_INV) component.

Field or Control	Description
Item Search/Item Links	On each of these pages, you can click the **Item Search/Item Links** button next to the **Item ID** field to access a transfer page, which lists several item-related components: Define Item (INV_ITEMS_DEFIN1), Define Business Unit Item (GEN_ATTRIB_INV), Copy Item (ITEM_COPY_INV), Maintain Item (INV_ITEMS_DEFIN1), and Maintain Business Unit Item (GEN_ATTRIB_INV).

This example illustrates the fields and controls on a sample transfer page.

Please select one of the following links:

Item Search

Define Item
Define Business Unit Item
Copy Item
Maintain Item
Maintain Business Unit Item

Cancel

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

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

Item Search Criteria Page

Use the Item Search Criteria page (ITEM_SEARCH_SP) to increase the search speed for the item and product IDs when you process inventory movements, sales orders, and material stock requests.

Navigation:

Click the **Item Search/Item Links** button next to any editable **Item ID** or **Product ID** field.

On the Transfer page, click the **Item Search** or the **Product Search** link.

This example illustrates the fields and controls on the Item Search Criteria page. You can find definitions for the fields and controls later on this page.
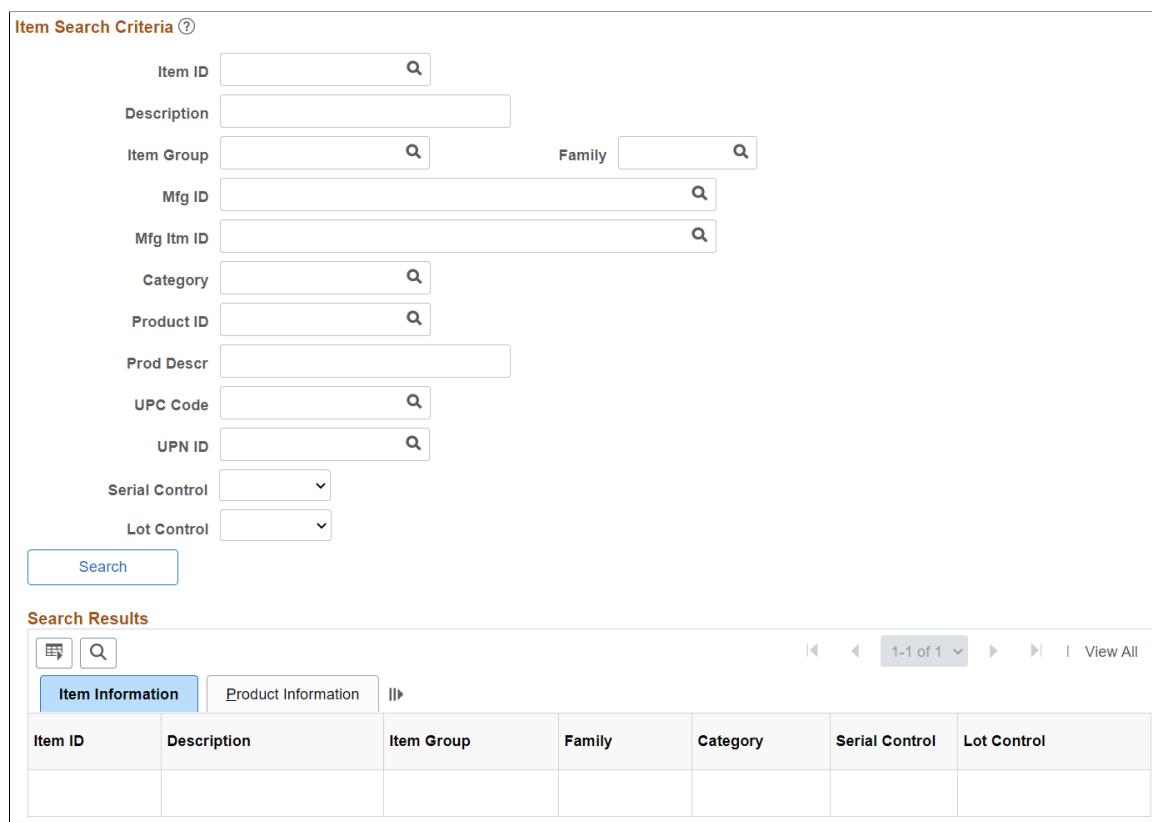
Note: If you access the page from the **Item Search** link, the page name is Item Search Criteria: Item Information. If you access the page from the **Product Search** link, the page name is Product Search Criteria: Item Information.

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

Field or Control	Description
Item ID, Item Group, Family, Mfg ID (manufacturing ID), **Mfg ItmID** (manufacturers item ID) and **Category, Product ID**	Enter a specific value or a partial value plus an appropriate wild card.
Description, Prod Descr (product description)	Enter a complete or partial value. This field does not require wild cards and is not case-sensitive.
Serial Control and **Lot Control**	Enter *Y* or *N* to search for items by serial or lot control flags.
Search	Click to retrieve any items or products that meet the criteria. The results of the search appear on the Item Information and Product Information tabs.

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

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

See the product documentation for *PeopleTools: PeopleSoft Applications User's Guide*.

Managing Inventory by Item Status

This topic discusses how to manage inventory by Item status.

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

Page Used to Manage Inventory by Item Status

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

Defining Item Status

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

Term	Definition
Under Initialization	New item definitions are added to the system tables at the SetID level with a status of Under Initialization. The item definition maintains this status until you manually change the current status to Pending Approval on the Define Item - General: Common page. No transactions are permitted while the item definition status is under initialization; however, you can add the item definition to the business unit level and modify the item attributes. After being approved at the SetID level, any valid definition that is created at the business unit level while the item has a status of *Under Initialization* or *Pending Approval* is updated to *Active* status.
Pending Approval	When you complete the item definition at the SetID level, you must change the current status from *Under Initialization* to *Pending Approval* manually on the Define Item - General: Common page. In environments that do not require item approval processing, the item status is changed automatically from *Pending Approval* to *Active* when you save the item definition. In environments that process items by using manual approval, the item is available on the Item Approval page. In environments that process items by using workflow approval, setting the item status to *Pending Approval* triggers item approval workflow and makes the item available on the Item Approval page. If the item definition is approved, the item status is updated automatically from *Pending Approval* to *Active* when the Item Approval page is saved. When the system updates an item's status from *Pending Approval* to *Active* at the SetID level, any valid definition that is created at the business unit level while the item status is *Under Initialization* or *Pending Approval* are also updated automatically to *Active*. No transactions are permitted while an item's status is *Pending Approval.*
Denied Approval	If the environment uses item approval processing, you can change the status of an item from *Pending Approval* to *Denied Approval* on the Item Approval page. When an item definition is denied approval, the item's status at both the SetID and the business unit levels is changed to *Denied Approval,* and no item transactions are permitted.

Term	Definition
Active	When an item's definition is approved, the system changes the item's status to *Active,* meaning that it's available for all transactions across PeopleSoft Supply Chain Management applications. Items with an *Active* status that is defined at the business unit level are eligible for item transactions in PeopleSoft Inventory, Manufacturing, and Supply Planning. Items with an *Active* status that is defined at the set ID level are eligible for most transactions in PeopleSoft Purchasing; however, items that are included on purchase orders and requisitions that reference an inventory business unit must have an *Active* status at the business unit level. You can change the status of an item with a *Hold, Discontinue,* or *Inactive* status back to *Active* at the SetID level on the Define Item - General: Common page or at the business unit level on the Define Business Unit Item - General: Common page.
Hold	Items with a *Hold* status are restricted to warehouse movement, adjustment, return material authorization (RMA), return to vendor (RTV), receiving, and putaway transactions. You cannot place or fulfill material stock requests for items with a *Hold* status, nor can these items be used in planning, replenishment, production, purchase order, or requisition transactions. This status does not apply when you are creating orders in PeopleSoft Order Management. You can change the status of an item with an *Active, Discontinue,* or *Inactive* status to *Hold* at the SetID level on the Define Item - General: Common page or at the business unit level on the Define Business Unit Item - General: Common page.
Inactive	Items with *Inactive* status are restricted to warehouse movement transactions, adjustments, RMA and RTV transactions, and receiving transactions. You cannot place or fulfill orders for items with an *Inactive* status, nor can these items be used in planning, replenishment, production, purchase order, or requisition transactions. You can remove item records with an *Inactive* status from the system by using the Inventory Data Purge process (IN_PURGE). To change an item to *Inactive* status, enter a future status of *Inactive* and a future status date on the Define Business Unit Item - General: Common page for the business unit and item or on the Define Item - General: Common page, and run the Change Item Status process (INS4000). Items that are defined as manufactured items cannot be inactivated. If you use PeopleSoft Manufacturing, you cannot inactivate an item that is specified on a bill of material (BOM), when it is defined as an assembly. Nor can you inactivate an item if it has a routing definition, if it is defined in a production area, or if production IDs or schedules exist.

Term	Definition
Discontinue	The *Discontinue* item status enables you to use up (phase out) on-hand quantity of an item. For items with a *Discontinue* status, you can place and fulfill orders, and you can perform warehouse movement transactions, adjustments, receiving, and RMA and RTV transactions. However, these items cannot be used in planning, replenishment, production, purchase orders, or requisition transactions. If you generate plans by using PeopleSoft Supply Planning, the optimization process begins driving the inventory level of the discontinued item to zero, or as close to zero as possible on the future status date. The optimization process satisfies demand for the item with whatever quantity is on hand and does not create any new planned orders. This process determines a projected use-up date, which theoretically is the quantity that is on hand when the discontinued item is consumed. You can use the projected use-up date as the obsolete date for the component of the BOM. If you do not modify the obsolete date for the component, and if you use substitute items, one of the substitutes for the discontinued item on the BOM substitution list can replace it on that particular production order or schedule. If no substitute items are defined for the discontinued item, the discontinued item is short. If you use PeopleSoft Manufacturing, you can always add production IDs and production schedules manually for a discontinued item if additional quantity on hand is required. You can change the status of an item with an *Active, Hold,* or *Inactive* status to *Discontinue* at the SetID level on the Define Item - General: Common page or at the business unit level on the Define Business Unit Item - General: Common page.

See <u>Approving Item Definitions</u>.

See <u>Inactivating Items</u>.

See <u>Updating Item Status</u>.

Understanding Item Status Requirements by Transaction Type

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

Term	Definition
Order Transactions	Include all transactions that involve creating or modifying sales orders, material stock requests, or express issues. Only items with a status of *Active* or *Discontinue* are valid for these transactions, and only these items appear in the associated item prompts.

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

Term	Definition
Receiving Transactions	Items with a status of *Active, Hold, Discontinue,* and *Inactive* are valid for receiving transactions, which include purchase order receiving, interunit transfer receiving, and RMA receiving. Only these items appear in the associated item prompts.
Putaway Transactions	Items with a status of *Active, Hold,* and *Discontinue* are valid for putaway transactions, and only these items appear in the associated item prompts.
Purchase Orders and **Requisitions**	Items with a status of *Active* are valid for purchase orders and requisitions, and only these items appear in the associated item prompts.

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

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

Transactions	Active	Hold	Discontinue	Inactive
Putaway.	X	X	X	
Purchase order and requisitions.	X			

Updating Item Status

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

New Items

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

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

Approved Items

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

Items with Future Status Changes

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

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

Related Links

<u>Inactivating Items</u>

Change Item Status Page

Use the Change Item Status page (RUN_INS4000) to define request parameters for the Change Item Status process (INS4000).

The Change Item Status process changes the current status of item definitions to the future status that is defined for the items when the scheduled date of the future status is on or before the date that the process is run. The Change Item Status process generates the Change Item Status Exceptions report, listing the items that are scheduled for inactivation that could not be updated to Inactive status.

Navigation:

Items > **Define Items and Attributes** > **Change Item Status**

Field or Control	Description
All and *Specific*	Run the Change Item Status process for all business units, or select a specific business unit.
	When the process runs for a specific business unit, all items that are in the business unit and have a future status date that is before or equal to the process date are processed. In addition, all items that are at the SetID level (for the SetID that is associated with the business unit) and have a future status date that is before or equal to the process date are processed.
	If you select all business units, all items that are in each defined business unit and have a future status date before or equal to the process date are processed. In addition, all items that are in each SetID and have a future status date that is prior to or equal to the process date are processed.

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

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

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

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

Inactivating Items

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

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

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

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

Requirements for SetID Item Inactivation

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

Requirements for Business Unit Item Inactivation

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

- PeopleSoft Inventory.

    - No non-shipped demand for the item exists in the inventory business unit.

    - No un-interfaced replenishment requests for the item exist in the inventory business unit.

    - No staged receipts or in-transit transactions exist for the item.

    - No par locations in the inventory business unit define the item as a stock item.

- PeopleSoft Purchasing (for purchased transactions that reference the inventory business unit of the item that is scheduled for inactivation).

    - No open requisitions exist for the item.

    - No open purchase orders exist for the item.

- No contract lines reference the item.

- No open RFQs (requests for quotes) exist for the item.

- No incomplete PO Build (purchase order) records exist for the item.

- No un-interfaced receipts exist for the item.

- No planned orders that are not sourced exist for the item.

- PeopleSoft Order Management.

  No open sales orders that are to be sourced from the inventory business unit include the item.

- PeopleSoft Manufacturing (for manufacturing transactions that reference the manufacturing business unit and the inventory business unit of the item that is scheduled for inactivation).

  - No BOMs exist for which the item is an assembly.

  - No routing definitions exist for the item.

  - No production areas have the item that you want to inactivate assigned to them.

  - No production IDs or production schedules exist for the item.

Related Links
Defining Item Status

Using Item Prompting

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

Related Links
Defining Item Status

Fulfilling Orders with Substitute Items

This topic lists common elements and discusses how to:

- Create item substitution definitions.

- View substitution options from item available inquiries.

- View an item's substitution definition at the SetID level.

- View an item's substitution definition at the business unit level.

- Enable item substitutions for an order line.

- Use item substitutions during picking.

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

Pages Used to Fulfill Orders with Substitute Items

Page Name	Definition Name	Usage
Substitute Items (SetID level) Page	INV_SUB_ITEM_SEC	View an item's substitution definition at the SetID level and, if appropriate, select an alternate item.
Substitute Items (business unit level) Page	INV_BU_SUB_ITM_SEC	View an item's substitution definition at the business unit level, and if appropriate, select an alternate item.

Related Links

"Item Substitution" (PeopleSoft Manufacturing)
"Manually Selecting Requisitions for Sourcing" (PeopleSoft Purchasing)
"Establishing Product Alternates" (PeopleSoft Order to Cash Common Information)

Common Elements Used in This Topic

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

Creating Item Substitution Definitions

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

To create an item substitution definition:

1. Define substitute items at the SetID level.

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

   • The substitute item's priority relative to other substitute options.

   • A start and end date specifying when the substitution is valid.

   • A conversion rate in the standard UOM specifying how many substitute items are required to replace the originally requested item.

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

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

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

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

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

Viewing Substitution Options from Item Availability Inquiries

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

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

Substitute Items (SetID level) Page

Use the Substitute Items (SetID level) page (INV_SUB_ITEM_SEC) to view an item's substitution definition at the SetID level and, if appropriate, select an alternate item.

Navigation:

Enter an item ID on the Availability Inquiry Selection page **Inventory** > **Manage Inventory** > **Review Inventory Balance Info** > **Item or Product Availability** and click the **Item Search/Item Links** button next to the **Item ID** field. Then click the **Substitute Items** link.

This example illustrates the fields and controls on the Substitute Items page (SetID). You can find definitions for the fields and controls later on this page.

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

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

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

Field or Control	Description
Conversion Rate	Specifies the factor to convert the transaction quantity to the items standard UOM.

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

Field or Control	Description
Use for Shipments	Indicates whether the substitute item is valid for picking for sales orders and material stock requests.
Use for Manufacturing	Indicates whether the substitute item can be used for substitutions on BOMs or production picking plans.
Use for Procurement	Indicates whether the substitute item can be used for substitutions during online sourcing in PeopleSoft Purchasing. This value is not copied to the business unit because PeopleSoft Purchasing uses only the substitution definition from the SetID level.

Related Links

Substituting Items

"Item Substitution" (PeopleSoft Manufacturing)

"Manually Selecting Requisitions for Sourcing" (PeopleSoft Purchasing)

Substitute Items (business unit level) Page

Use the Substitute Items (business unit level) page (INV_BU_SUB_ITM_SEC) to view an item's substitution definition at the business unit level, and if appropriate, select an alternate item.

Navigation:

Enter an item ID on the pages in the Material Stock Request component or the Express Issue page, and click the **Transfer** button next to the **Item ID** field. On the Transfer page, click the **Substitute Items** link.

This example illustrates the fields and controls on the Substitute Items page (business unit). You can find definitions for the fields and controls later on this page.

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

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

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

For each substitution option, the system displays this information:

Field or Control	Description
Conversion Rate	Specifies the factor to convert the transaction quantity to the item's standard UOM.

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

Enabling Item Substitutions for an Order Line

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

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

  You can make substitutions only at the time of picking for order lines that permit substitution. To enable substitutions on a sales order, select the **Allow Item Substitutes** option on the Sold-To Data page, which is used as a default in sales orders in PeopleSoft Order Management. You can change this setting until a substitution is recorded for the order line on the Picking Feedback page or until the order line is shipped. After the order line is added to a pick batch ID and before the order line is shipped, you must duplicate any changes that you made to the Allow Item Substitutes setting on the sales order pages on the Maintain Stock Request page in PeopleSoft Inventory. Changes that are made

to order line attributes in PeopleSoft Order Management after the order line appears on a pick plan are not replicated automatically.

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

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

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

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

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

- The full quantity on the order line is substituted.

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

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

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

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

  Before you can record a substitution on the Picking Feedback page for an order line that is assigned to a shipping container or shipping serial ID, you must dissociate the order line from the shipping container or shipping serial ID. In bar code environments, you can do this on the Ship Containers/Serials page using transaction 0624 or 0625 for shipping containers and transaction 0632 or 0633 for shipping serial IDs. You can also dissociate an order line from a shipping container by using the Packing Session component. Likewise, you can dissociate an order line from a shipping serial ID by deleting all shipping serial IDs for the order line on the Shipping/Issues - Ship Serial page.

Related Links

"Changing Information on an Order" (PeopleSoft Inventory)

Using Item Substitutions During Picking

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

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

- The order line permits substitutions—that is, the **Allow Item Substitutes** option is selected.

- A substitution definition for the requested item is in effect for the item at the business unit level—that is, the date that the Picking Plan process is run is between the start and end dates that are specified on the item substitution definition.

- The order line does not represent a return-to-vendor transaction or a backorder.

- The item that is on the order line is not a configured item or a component of a kit.

- The item substitution definition specifies that the substitution is valid for shipments—that is, the **Use for Shipments** option is selected for the item substitution definition.

- Insufficient quantity of the originally requested item is available to fulfill the order line.

- Sufficient quantity of the substitute item is available to completely fulfill the order line.

- The order line is not lot allocated.

- The order line is not associated with a shipping container or shipping serial ID.

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

See "Understanding Component Issue Methods" (PeopleSoft Manufacturing).

To use an item substitution during picking:

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

   For sales orders, select the **Allow Item Substitutes** option on the Sales Order pages in PeopleSoft Order Management. For stock requests that are created by using the Create/Update Stock Request pages, the Express Issue page, or the PO Sourcing process, the Allow Item Substitutes setting will

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

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

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

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

3. Pick a valid substitute item, if needed.

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

4. Record the substitution on the Picking Feedback page.

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

Related Links

Enabling Item Substitutions for an Order Line

Using Universal Item Identifiers

To define universal item identifiers, universal item ID types, and manufacturers, use the Universal Item Identifier (ITM_MFG_UPN), Universal Item ID Type Code (UPN_TYPE_CD), and Manufacturer (MANUFACTURER) components. Use the ITM_MFG_UPN_CI and the IN_EIP_ITEM_MFG_CI component interfaces to load data into the tables for this component.

This topic lists common elements and discusses how to:

*   Define universal item ID types.

*   Designate manufacturer default type codes.

*   Designate preferred manufacturers.

*   Define universal item identifiers.

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

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

To use universal item identifiers, complete these steps:

- Define universal item ID types on the Universal Item ID Type Code page, and indicate whether it represents a GTIN.

- Assign a default universal item ID on the Manufacturers page, and indicate whether the manufacturer is locally owned.

- Designate a preferred manufacturer for each item that needs a universal item identifier on the Manufacturers Item page.

- Define universal item identifiers for the SetID-item ID-manufacturer-UOM combination on the Universal Item Identifiers page.

- Alternatively, you may enter a locally owned GTIN for the item-UOM combination on the Assigning a UOM to an Item page.

- Associate a GLN with a customer on the Additional General Information page.

- Designate suppliers that are ready to use UPNs on the Supplier Information - Additional Procurement Options page.

Pages Used to Set Up Universal Item Identifiers

Page Name	Definition Name	Usage
Universal Item ID Types Page	UPN_TYPE_CD	Define universal item ID types at the SetID level, and determine whether the ID represents a GTIN.
Manufacturer Page	MANUFACTURER	Designate manufacture default type codes by selecting a default universal item ID for a manufacturer, and determine whether the manufacturer is locally owned. A manufacturer ID may be used to represent an EAN.UCC company prefix.
Manufacturer's Item Page	ITM_MFG_SP	Designate preferred manufacturers by defining information about the item's manufacturer and access the Universal Item Identifiers page and the Item Manufacturer GPO page.

Page Name	Definition Name	Usage
Universal Item Identifiers Page	ITM_MFG_UPN	Define universal item identifiers by assigning them by item ID, manufacturer ID, and UOM. Before you can access this page, you must select and save a preferred (default) manufacturer on the Manufacturer's Item page.

Related Links

"General Information - Additional General Info Page" (PeopleSoft Order to Cash Common Information)

Common Elements Used in This Topic

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

Universal Item ID Types Page

Use the Universal Item ID Types page (UPN_TYPE_CD) to define universal item ID types at the SetID level, and determine whether the ID represents a GTIN.

Navigation:

Items > Define Controls > Define Universal Item ID Types

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

To define universal item ID types for SetIDs:

1.   Select a SetID for which you want to assign a universal item ID type.

2. Enter a code of four characters or fewer for the identifier type.

3. Click **Add.**

4. Enter a long description (required) and a short description.

5. Select the **Global Trade Item Number** check box if the ID type is to be used for GTINs.

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

6. Save the changes.

Manufacturer Page

Use the Manufacturer page (MANUFACTURER) to designate manufacture default type codes by selecting a default universal item ID for a manufacturer, and determine whether the manufacturer is locally owned.

A manufacturer ID may be used to represent an EAN.UCC company prefix.

Navigation:

Items > **Define Controls** > **Manufacturers**

Set Up Financials/Supply Chain > **Product Related** > **Procurement Options** > **Purchasing** > **Manufacturer**

Use the Manufacturers (IN_EIP_ITEM_MFG_GBL) component to define manufacturers, designate a universal item identifier-type code as the default for a manufacturer, and indicate whether the manufacturer is locally owned. Use the Manufacturers (IN_EIP_ITEM_MFG_CI) component interface to load data into the tables for this component.

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

1. Select the universal item ID type for the manufacturer in the **Default Universal Item ID** field.

   The selection appears on the Universal Item Identifiers page.

2. Select the **Locally Owned** check box to indicate that the manufacturer is locally owned.

   This selection appears on the Universal Item Identifiers page. More than one manufacturer ID can be locally owned.

3. Save the changes.

Manufacturer's Item Page

Use the Manufacturer's Item page (ITM_MFG_SP) to designate preferred manufacturers by defining information about the item's manufacturer and access the Universal Item Identifiers page and the Item Manufacturer GPO page.

Navigation:

Items > Define Items and Attributes > Define Item > General: Common

Select the **Manufacturer** link.

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

To designate a preferred manufacturer:

1. Select the check box in the appropriate row designating the preferred manufacturer.

    Only one manufacturer can be selected as the preferred manufacturer for the item.

2. Click **OK.**

    The PeopleSoft system displays the Define Item - General: Common page.

3. Save the changes.

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

Universal Item Identifiers Page

Use the Universal Item Identifiers page (ITM_MFG_UPN) to define universal item identifiers by assigning them by item ID, manufacturer ID, and UOM.

Before you can access this page, you must select and save a preferred (default) manufacturer on the Manufacturer's Item page.

Navigation:

Items > Define Items and Attributes > Universal Item ID

This example illustrates the fields and controls on the Universal Item Identifiers page. You can find definitions for the fields and controls later on this page.

To define universal item identifiers for an item, use the Universal Item Identifier (IN_MFG_UPN_GBL) component. Use the Universal Item Identifier (IN_MFG_UPN_CI) component interface to load data into the tables for this component.

To define universal item identifiers:

1. Select the **Sel** (select) check box in the row that is next to the manufacturer for which you want to assign a universal item identifier.

2. Click the **Universal Item Identifiers** link.

   The PeopleSoft system displays the Universal Item Identifiers page.

3. Select a universal item ID type and a UOM, and enter an identifier.

   The default universal item ID-type code comes from the Manufacturer page.

4. Save the changes.

Field or Control	*Description*
SetID	Enter an identification code that represents a set of control table information or Table Sets.
Item ID	Enter an identification code for the associated item.
Mfg ID	Enter the Manufacturer ID.

Field or Control	*Description*
Description	Enter the name of the Manufacturer.
Mfg Item ID	Enter the Manufacturer Item ID.
Locally Owned	Select to indicate that the manufacturer is locally owned. **Note:** More than one manufacturer ID can be locally owned.
Item's Preferred Manufacturer	Select to indicate the preferred manufacturer of the item.
Item Identifier Type	Select the universal item ID type of the manufacturer.
Unit of Measure	Select the appropriate UOM of the Manufacturer .
Identifier	Enter the unique GTIN ID for the particular Item Identifier and Unit Of Measure combination of the appropriate Manufacturer and Manufacturer Item ID.
GTIN Children Quantity	Enter the count of the child GTINs contained in this item.
Parent GTIN	Enter the GTIN of the trade item for the product packaging level immediately above this item.
Net Content Unit Quantity	Enter the amount of the trade items contained in a package and usually claimed on the label.
Child GTIN	Enter the GTIN of the trade item for the product packaging level immediately below this item.
Net Unit Quantity UOM	Enter the unit of measure for net content.
GTIN Children Quantity UOM	Enter the unit of measure of the quantity of children.
Primary Identifier Type	Enter the classification identifier used for the unique identifier nomenclature. The code will usually be GTIN.
Bar Code Type	Indicate if the trade item is physically bar-coded with the primary trade item identification number.

Field or Control	Description
Base Unit	Select to indicate if the associated GTIN is the lowest level of an item's hierarchy. **Note:** If yes, this GTIN cannot have any children and means there are no other products within and is the lowest package unit.
Consumer Unit	Select to indicate that this trade item will be scanned at point of use.
Invoice Unit	Select to identify that the information provider will include this trade item on their billing or invoice.
Variable Measure	Select indicate that an article is not a fixed quantity, but is variable. **Note:** A quantity can be the weight, length or volume. A trade item is used or traded in continuous rather than discrete quantities.
Orderable	Select to indicate that this GTIN can be ordered.
Shipping Unit	Select to identify that the information provider considers the trade item as a dispatch (shipping) unit.

Using Alternative Item Groups

This topic discusses how to define alternate item groups.

Page Used to Define Alternate Item Groups

Page Name	Definition Name	Usage
Alternate Item Groups Page	IN_ALT_ITEM_GROUPS	Define alternate item groups.

Alternate Item Groups Page

Use the Alternate Item Groups page (IN_ALT_ITEM_GROUPS) to define alternate item groups.

Navigation:

Set Up Financials/Supply Chain > **Product Related** > **InventoryMobile** > **Alternate Item Groups**

This example illustrates the fields and controls on the Alternate Item Groups page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Alternate Type	Select the type of alternate item such as Universal Item ID Type or Manufacturer item ID. If you select *UPN* in this field, then you must select an option in the **UPN Type Code** field.
UPN Type Code (universal product number type code)	Select the UPN type code.
Default UOM (default unit of measure)	Select to indicate that the associated UOM should be used by the system as a default for the transaction. This option is only available when Universal Item Type is selected in the Alternate Type field.

Using Device Tracking

This section discusses how to:

• Select items for device tracking.

• Receive tracked devices.

- Access tracked device distribution information.

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

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

You can use device tracking to:

- View and override information that is used to put items into PeopleSoft Inventory storage locations.

- Review tracking information during the procurement process.

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

Reviewing Tracked Item Information

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

- Line Details (REQ_LINE_DETAILS).

- Line Details (PO_LINE_DTLS).

- Item Details (CNTRCT_ITM_DTL_SEC, CNTRCT_RLS_ITM_SEC).

- Receiving (RECV_WPO).

- Request for Quotes (RFQ_HDR).

- Line Details (REQ_INQ_LINE).

- Receipts (RECV_INQ).

- Request for Quotes (RFQ_HDR).

- Device Tracking Inquiry (RECV_INQ_DEVICE).

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

Displaying Device Tracking Information on Reports

You can produce these reports with device tracking information displayed:

Document	Process Name	Usage
Device Tracking Master List	IN Device Tracking Item List (INS9030)	Displays device-tracked items, filtered according to the parameters that are selected. See PeopleSoft Item Reports.
P/O Receipt Device Tracking	Device Tracking Receipts (PORC930)	Displays device-tracked items that are received.

Pages Used for Device Tracking

Page Name	Definition Name	Usage
Define Item - Inventory Tracking/ Description Page	INV_ITEMS_DEFIN2	Select an item for device tracking and establish or maintain item descriptions and lot-control attributes.
Receiving Page	RECV_WPO	Create receipts for non-PO and PO line items.
Device Tracking Page	RECV_WPO_DEVICE	Review distribution information for a tracked device and assign serial IDs or lot IDs.

Define Item - Inventory Tracking/Description Page

Use the Define Item - Inventory Tracking/Description page (INV_ITEMS_DEFIN2) to select an item for device tracking and establish or maintain item descriptions and lot-control attributes.

Navigation:

Items > **Define Items and Attributes** > **Define Item** > **Inventory**

Select the item that you want to track.

1. Select the **Device Tracking** check box.

2. Save the changes.

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

Receiving Page

Use the Receiving page (RECV_WPO) to create receipts for non-PO and PO line items.

Navigation:

Purchasing > **Receipts** > **Add/Update Receipts**

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

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

Field or Control	Description
Device Track	Indicates whether a receipt line is device tracked. The default value is selected and unavailable for device-tracked items unless they are description-only (no item ID). The field is available for items that are description-only. Select to device track items that are description-only.
DT Details	Click to access the Device Tracking page.

Device Tracking Page

Use the Device Tracking page (RECV_WPO_DEVICE) to review distribution information for a tracked device and assign serial IDs or lot IDs.

Navigation:

Purchasing > **Receipts** > **Add/Update Receipts**

Click the **DT Details** button in an item row.

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

Distribution Information

Field or Control	Description
	Click the **Assign Serial IDs** button to access the Generate Serial Number page, where you can assign serial ID numbers to the selected receipt items. This page is accessible only if the related item is serial-controlled.
	Click the **Lot ID** button to access the Generate Lot Numbers page, where you can assign a lot ID to a lot-controlled item. This page is accessible only if the related item is lot-controlled.

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

Field or Control	Description
Sel (select)	Select to work with a particular line item.
Dist Seq (distribution sequence)	Identifies the putaway row number that is associated with the specific distribution line.
IN Unit (inventory business unit)	Identifies the inventory business unit for the distribution. For non-PO receipts, this value is supplied by default from the ship-to location. For PO receipts, this value appears by default from the PO distribution.
Status	The status of the receipt line.
Serial/Component	Enter a serial ID. This field is available if the **Serial Control** check box is selected on the Define Item - Inventory: Tracking/Description page, or for items that are ordered by description if the **Device Track** and **Serial** check boxes are selected on the Receiving page.
Lot/Batch	Enter a lot ID. This field is available if the **Lot Control** check box is selected on the Define Item - Inventory: Tracking/Description page, or if the **Device Track** check box is selected for description-only items on the Receiving page. The value that you enter becomes the default for the **Supplier Lot** field.

Field or Control	Description
Supplier Lot	Enter a supplier-assigned lot ID. This field is available only if the **Lot Control** check box is selected on the Define Item - Inventory: Tracking/Description page.
Expire Dte (expire date)	Enter the expiration date for the lot ID. This field is left blank if the item is a non-inventory receipt line (subcontract, expense only, or an asset-only interface receipt). The date here is unavailable for change if the item's lot ID is assigned an expiration date. If the item's lot ID does not have an assigned expiration date, the item's shelf life value (if greater than zero) is added to the receipt date to calculate the expiration date. This expiration date value is available for override. If no shelf life value is entered for the item, you are required to enter one.

Defining Custom Item Attributes

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

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

For the SetID, define custom item attributes on the Define Item - Custom1: Character page, Define Item - Custom2: Character page, Define Item - Custom1: Numeric page and Define Item - Custom2: Numeric page. The values that you define automatically change to the business unit level. You can modify these attributes on the Define Business Unit Item - Custom1: Character page, Define Business Unit Item - Custom2: Character page, Define Business Unit Item - Custom1: Numeric page and Define Business Unit Item - Custom2: Numeric page.

See the product documentation for *PeopleTools: PeopleSoft Application Designer Developer's Guide*.

Using Item Quantity UOM

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

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

Standard UOM

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

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

Standard Pack Unit of Measure

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

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

Stocking UOM

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

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

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

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

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

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

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

Ordering UOM

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

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

Shipping UOM

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

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

Rules for Deleting UOMs

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

- All UOMs: No item uses this UOM as a default stocking UOM.

- Stocking UOM: No quantity on hand or negative quantity exists in any storage location (the PHYSICAL_INV table) and no quantity exists in the putaway staging tables (STAGED_INF_INV and STAGED_ITEM_INV).

- Ordering UOM: No data exists in the ordering tables (DEMAND_INF_INV and DEMAND_INV) and no undepleted data exists in the Shipping Interface table (SHIP_INF_INV).

- Shipping UOM: No undepleted data exists in the Shipping Interface table (SHIP_INF_INV).

Using Units of Measure

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

Page	Valid Unit of Measure
Material Stock Request.	Ordering
Picking Feedback.	Stocking
Shipping/Issues.	Shipping
InterUnit and RMA Receiving.	Stocking
Express Putaway.	Stocking
Stockroom Feedback.	Stocking
Adjustments.	Stocking
Transfers.	Stocking
Container Management.	Stocking
Packing.	Shipping
Physical Accounting.	Stocking

Using UOMs with Electronic Data Collection Systems

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

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

• If you select *Convert to Standard UOM* (convert to the standard unit of measure), the system converts the UOM on incoming transactions to the item's standard UOM.

  This enables you to stock all of the inventory in the standard UOM and perform material movement transactions by using any valid UOM for the item.

• If you select *Convert to Default Stock UOM* (convert to the default stocking unit of measure), the system converts the UOM on incoming transactions to the default stocking UOM.

- If you select *Use Entered UOM,* the system processes transactions by using whatever UOM the user enters.

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

- The shipping container and shipping serial transactions accept only the shipping UOM.

  After verifying that the entered UOM is valid for shipping, the system processes the transaction by using that UOM.

- The interunit and purchase order receiving transactions use a receiving UOM rather than a putaway UOM and therefore accept any valid UOM for the item.

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

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

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

- The shipping notification transaction both picks and ships stock.

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

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

Transaction	*Use the Entered UOM*	*Convert to the Standard UOM*	*Convert to Default Stocking UOM*
Picking.	Stocking.	Any valid UOM for the item.	Any valid UOM for the item.
Shipping Containers.	Shipping.	Shipping.	Shipping.
Putaway.	Stocking.	Any valid UOM for the item.	Any valid UOM for the item.
Transfers.	Stocking.	Any valid UOM for the item.	Any valid UOM for the item.
Adjustments.	Stocking.	Any valid UOM for the item.	Any valid UOM for the item.
Interunit Receipts.	Any valid UOM for the item.	Any valid UOM for the item.	Any valid UOM for the item.
Shipping Notification.	Stocking.	Any valid UOM for the item.	Any valid UOM for the item.
Purchase Order Receiving.	Any valid UOM for the item.	Any valid UOM for the item.	Any valid UOM for the item.

Transaction	Use the Entered UOM	Convert to the Standard UOM	Convert to Default Stocking UOM
Kit Issues/Returns.	Standard.	Any valid UOM for the item.	Any valid UOM for the item.
Completions.	Standard.	Any valid UOM for the item.	Any valid UOM for the item.
Production Picking.	Stocking.	Any valid UOM for the item.	Any valid UOM for the item.

Examples: How to Use UOMs

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

Using a Single Stocking UOM with Multiple Ordering and Shipping UOMs

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

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

Receiving Transaction

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

Putaway Transaction

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

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

Transfer Transaction

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

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

Material Stock Request Transaction

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

Picking Transaction

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

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

Shipping/Issues Transaction

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

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

Using Multiple Stocking UOMs

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

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

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

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

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

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

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

Associating Items with UOMs

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

To associate items with UOMs:

1. Establish UOMs for the SetID.

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

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

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

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

   ---

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

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

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

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

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

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

Related Links
Establishing Quantity Precision and Rounding Rules for Items

Establishing Quantity Precision and Rounding Rules for Items

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

Understanding Rules used when Rounding

This topic discusses:

- Quantity Precision Rules.

- Rounding Rules.

- Automatic UOM Rounding.

Quantity Precision Rules

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

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

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

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

See Setting Up Quantity Precision and Rounding Rules.

Rounding Rules

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

- Natural round

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

- Round up

  Fractional values are rounded up to the nearest integer.

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

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

See Understanding Rounding Exceptions.

Automatic UOM Rounding

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

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

* Generates a warning message.

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

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

* Generates an error message.

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

* Performs automatic rounding without generating a message.

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

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

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

Understanding Rounding Exceptions

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

PeopleSoft Purchasing

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

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

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

PeopleSoft Manufacturing

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

• Quantity per assembly.

• Cost Rollup process.

• Component demand.

Related Links

"Building Inventory Demand Transactions" (PeopleSoft Purchasing)
"Understanding the Purchase Order Sourcing Business Process" (PeopleSoft Purchasing)
"Rounding Rules in Manufacturing" (PeopleSoft Manufacturing)

Setting Up Quantity Precision and Rounding Rules

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

To set up quantity precision and rounding rules:

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

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

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

2. Define automatic rounding rules for UOM conversions.

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

Related Links

Establishing Quantity Precision and Rounding Rules for Items

Viewing Item Information

This section describes how to view item information.

Pages Used to View Item information

Page Name	*Definition Name*	*Usage*
Item Brand Names Page (inquiry)	BRND_NAME_INQ_INV	View brand names that are associated with an item and the periods for which the brand names are valid.
Items - General: Common Page (inquiry)	NV_ITEMS_DEFIN1	View the item attributes that are defined on the Define Item - General: Common page.
Items - General: Classifications Page	INV_ITEMS_DEFIN4	View the item attributes that are defined on the Define Item - General: Classifications page.
Items - General: Dimensions Page (inquiry)	INV_ITEMS_DEFIN3	View the item attributes that are defined on the Define Item - General: Dimensions page.
Items - General: Usage Page (inquiry)	INV_ITEMS_DEFIN8	View the item attributes that are defined on the Define Item - General: Usage page.
Items - Inventory: Tracking/Description Page(inquiry)	INV_ITEMS_DEFIN2	View the item attributes that are defined on the Define Item - Inventory: Tracking/Description page.
Items - Inventory: Shipping/Handling Page(inquiry)	INV_ITEMS_DEFIN5	View the item attributes that are defined on the Define Item - Inventory: Shipping/Handling page.
Items - Substitutes Page(inquiry)	INV_ITEMS_DEFIN7	Use the page to view the item attributes that are defined on the Define Item - Substitutes page.
Items - Configuration Page (inquiry)	INV_ITEMS_DEFIN6	Use the page to view the item attributes that are defined on the Define Item - Configuration page.
Define Item - Custom1: Character Page (inquiry)	INV_ITEMS_DEFIN9	View the item attributes that are defined on the Define Item - Custom1: Character page.

Page Name	Definition Name	Usage
Define Item - Custom1: Numeric Page	INV_ITEMS_DEFIN10	View the item attributes that are defined on the Define Item - Custom1: Numeric page.
Define Item - Custom2: Character Page (inquiry)	INV_ITEMS_DEFIN11	View the item attributes that are defined on the Define Item - Custom2: Character page.
Define Item - Custom2: Numeric Page	INV_ITEMS_DEFIN12	View the item attributes that are defined on the Define Item - Custom2: Numeric page.
Items - Audit (Inquiry) Page	INV_ITEM_HDR_INQ	View information about when the item was defined for the SetID and when the SetID definition was last modified.
Catalog - Catalog Inquiry Page	CATALOG_INQUIRY	View item information in the purchasing catalogs.
Item Category Detail Page(inquiry)	ITM_CAT_DETAIL	View details about a selected item, including availability, standard pricing, and lead time.
Item Supplier Priority Page (inquiry)	ITM_CAT_VNDR	View Supplier information such as status and priority.
Substitute Items Page(inquiry)	ITM_SUB_PNL	View substitutes that are established for an item.
Default Putaway Locations Page (inquiry)	DEFALT_LOC_INQ_INV	View all of the default putaway locations for items that are defined by using the Default Putaway Locations page.
Fixed Picking Locations Page (inquiry)	FIXED_LOC_BIN_INQ	View all of the fixed picking locations that are defined for an item by using the Fixed Picking Locations page.

Items - Audit (Inquiry) Page

Use the Items - Audit (inquiry) page (INV_ITEM_HDR_INQ) to view information about when the item was defined for the SetID and when the SetID definition was last modified.

Navigation:

Items > **Review Item Information** > **Review Item SetID Attributes** > **Audit**

Items > **Define Items and Attributes** > **Define Item** > **Audit**

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

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

Related Links

Managing Inventory by Item Status

Using Enterprise Integration Points for Items

This topic discusses how to:

• Send outbound data with the Item Master EIP.

• Send item information to PeopleSoft CRM.

• Receive inbound data with the Item Master EIP and the Item Price List EIP.

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

Related Links

Sending Item Information to PeopleSoft CRM
Understanding Item Loading
"Integration Implementation" (PeopleSoft Supply Chain Management Integration)

Sending Outbound Data with the Item Master EIP

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

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

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

When you activate the ITEM_SYNC or ITEMSYNC_EFF service operations, outbound item information is generated from these 11 points within the PeopleSoft system as approved items are being maintained:

1. Define Item component.

2. Purchasing Attributes component.

3. Approve Item component.

4. Purchasing Attributes component.

5. Units of Measure component.

6. Universal Item Identifiers.

7. Copy Item component.

8. Revision Maintenance component.

9. BOM Mass Maintenance by MMC.

10. BOM Mass Maintenance by ECO.

11. Item Loader process (IN_ITMLOAD).

12. Item Add component.

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

See "PeopleSoft SCM Outbound EIPs" (PeopleSoft Supply Chain Management Integration).

See "General WMS Integration Issues" (PeopleSoft Supply Chain Management Integration).

Message Structure

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

Segment	Parent	Valid Relationships
Item Master.	None.	
Item Detail.	Item Master.	1:1 on effective-dated messages or both 1:1 and 1:many on messages that are not effective-dated.
Item UOM.	Item Master.	1:1 or 1:many.
Item Purchasing Attributes.	Item Master.	1:0 or 1:1.
Item Bus Unit Attributes.	Item Master.	1:0, 1:1, or 1:many.
Item Bus Unit Weight/Volume.	Item Bus Unit Attributes.	1:0 or 1:1, or 1:many.
Item Revision.	Item Bus Unit Attributes.	1:0, 1:1, or 1:many.
Item Category.	Item Master.	1:0, 1:1, or 1:many.
Item Manufacturer.	Item Master.	1:0, 1:1, or 1:many.
Universal Item Identifier.	Item Master.	1:0, 1:1, or 1:many.

Message Segments

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

- The parent segment of the message is always included on the EIP transaction.

  If the parent segment does not have a PSCAMA record, or if it does have a PSCAMA record with a blank audit action code, then no modifications are made to the parent segment. In this case, the parent is included only for reference purposes.

- The EIP transaction is published if any fields for a source record are altered on any of the pages that are listed.

  The audit action code on the PSCAMA record is set to the appropriate code based on the action that is being performed (add, change, or delete). Because all fields of the source record are not sent on the EIP transaction, cases may exist in which transactions are published even though none of the fields have been modified. The logic that determines whether to publish a transaction only checks that the source record has been altered. It does not check field by field to determine whether the altered fields are on the message used by the EIP transaction.

- Because the logic that publishes the transaction does not check field by field to determine whether a specific field has been altered, all fields that are on a message segment are published if any field that is on the source record is altered.

- The item EIP transactions are published only for an item that has an *Approved* status.

Define Item

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

- Add mode with a status of *Approved:*

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

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

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

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

Segment	Audit Action	Comments and Data Rules
Item Manufacturer	A	Published only if any exist.
Universal Item Identifier	A	Published only if any exist.

- Update or Correction mode with a previously approved item:

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

Item UOM Page

The Item UOM page provides these message segments:

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

Universal Item Identifiers Page

The Universal Item Identifiers page provides these message segments:

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

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

Purchasing Attributes Page

The Purchasing Attributes page provides these message segments:

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

Define Business Unit Item Page

You can use Add or Update mode.

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

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

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

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

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

- Update mode:

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

Item Approval Page

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

Segment	Audit Action	Comments and Data Rules
Item Master	A	Always published.
Item Detail	A	Always published.
Item UOM	A	Always published.
Item Purchasing Attributes	A	Published only if any exist.

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

Item Copy Page

The Item Copy page provides these message segments:

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

REV Maintenance

The REV Maintenance page provides these message segments:

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

BOM Mass Maintenance by MMC and BOM Mass Maintenance by ECO

The BOM Mass Maintenance pages provide these message segments:

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

Item Loader Process

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

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

Segment	Audit Action	Comments and Data Rules
Item Master	A	Always published.
Item Detail	A	Always published.
Item UOM	A	Always published.
Item Purchasing Attributes	A	Published only if it exists.
Item Bus Unit Attributes	A	Published only if it exists.
Item Bus Unit Wgt/Vol	A	Published only if it exists.

Segment	Audit Action	Comments and Data Rules
Item Revision	A	Published only if it exists.
Item Category	A	Published only if it exists.
Item Manufacturer	A	Published only if it exists.
Universal Item Identifier	A	Published only if it exists.

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

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

Segment	Audit Action	Comments and Data Rules
Universal Item Identifier	A, C, or space	Published only if altered on inbound message.

Full Data Publish

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

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

Sending Item Information to PeopleSoft CRM

If you are integrating with PeopleSoft CRM, you can use the CRM Item Sync EIPs to synchronize item data in the CRM and PeopleSoft Inventory systems. The CRM Item Sync EIPs are two service operations defined in PeopleSoft Integration Broker, ITEM_CRM_FULLSYNC_EFF and ITEM_CRM_SYNC_EFF. Use the ITEM_CRM_FULLSYNC_EFF service operation to send a list of all items in the PeopleSoft Inventory Item Master table to CRM. The PeopleSoft CRM FieldService and Call Center applications use this item information for initial population of their Item Master tables. Use the ITEM_CRM_SYNC_EFF service operation to send incremental updates automatically as item information is modified online or by

the Item Loader process (IN_ITMLOAD). When you use the ITEM_CRM_SYNC_EFF service operation, you must also activate the internal ITEM_CRM_SYNC service operation. This service operation does not send data to the PeopleSoft CRM system, but it is essential for ITEM_CRM_SYNC_EFF to work properly.

When you activate the ITEM_CRM_SYNC and ITEM_CRM_SYNC_EFF service operations, outbound item information is generated from these five points within the PeopleSoft system as approved items are being maintained:

- Define Item component.

- Approve Item component.

- Units of Measure component.

- Copy Item component.

- Item Loader process (IN_ITMLOAD).

- Item Add component.

See "PeopleSoft SCM Outbound EIPs" (PeopleSoft Supply Chain Management Integration).

See *PeopleSoft CRM Integrated FieldService*

See *PeopleSoft CRM Call Center*

Setting Up the CRM Item Sync EIPs

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

1. Setup within the PeopleSoft Inventory application:

   There are no setup steps within PeopleSoft Inventory.

2. Setup within PeopleSoft Integration Broker and Enterprise Components:

   "Setting Up Service Operations" (PeopleSoft Supply Chain Management Integration).

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
ITEM_CRM_ FULLSYNC_EFF	Outbound Asynchronous		No	CRM
ITEM_CRM_SYNC_ EFF	Outbound Asynchronous		No	CRM

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
ITEM_CRM_SYNC	Local Asynchronous	ItemCRMSyncEff	No	CRM

See "Setting Up Service Operations" (PeopleSoft Supply Chain Management Integration).

See *PeopleTools: PeopleSoft Integration Broker*

Message Structure

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

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

Message Segments

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

• The parent segment of the message is always included on the EIP transaction.

   If the parent segment does not have a PSCAMA record, or if it does have a PSCAMA record with a blank audit action code, then no modifications were made to the parent segment. In this case, the parent is included only for reference purposes.

• The EIP transaction is published if any fields for a source record are altered on any of the pages that are listed.

   The audit action code on the PSCAMA record is set to the appropriate code based on the action that is being performed. Because all fields on the source records are not sent on the transaction, cases

might exist where data is published even though none of the fields have been modified. The logic that determines whether to publish an EIP transaction only checks that the source record has been altered. It does not check field by field to determine whether the altered fields are on the message used by the EIP transaction.

• Because the logic that publishes the transaction does not check field by field to determine whether a specific field has been altered, all fields that are on a message segment are published if any field on the source record is altered.

• The item EIP transactions are published only for an item that has an *Approved* status.

Define Item

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

• Add mode with a status of *Approved:*

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

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

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

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

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

Item UOM Page

The Item UOM page provides these message segments:

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

Item Approval Page

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

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

Item Copy Page

The Item Copy page provides these message segments:

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

Item Loader Process

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

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

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

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

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

Segment	Audit Action	Comments and Data Rules
Item UOM	A, C, or space	Published only if altered on inbound message.

Full Data Publish

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

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

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

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

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

Related Links
"Integration Implementation" (PeopleSoft Supply Chain Management Integration)

Changing the Item Type

After you have used an item ID in the PeopleSoft system, you may want to change the item from an inventory item type to a non-inventory item type or conversely, change from a non-inventory to an inventory item type. Business conditions often change. It might be more cost-effective to just expense an item that has previously been tracked in inventory. Likewise, an item that was once considered an expense (non-inventory) item may need to be kept and tracked in PeopleSoft Inventory.

An item is defined as an inventory item by the value of *Y* (yes) in the INVENTORY_ITEM field of the MASTER_ITEM_TBL record. The item is defined as a non-inventory item when the value is *N* (no). You can change the inventory item type setting of an item ID by:

- Selecting or deselecting the **Inventory Item** check box on the online Define Item - General: Common page. This method is best for changing a few items.

- Using the Item Loader process to change the value in the INVENTORY_ITEM field of the selected items. This method is best for changing many items at one time.

An inventory item can be physically stocked and tracked in one or more PeopleSoft Inventory business units and used on material stock requests (MSR) within the Inventory business units. A non-inventory item is not used within the PeopleSoft Inventory business units and cannot be added to an MSR. Both item types can be:

- Added to sales orders in PeopleSoft Order Management.

- Added to requisitions and purchase orders in PeopleSoft Purchasing.

- Added to work orders and job templates in PeopleSoft Maintenance Management.

- Defined on a Bill of Materials (BOM) in PeopleSoft Manufacturing.

- Used in forecasts at both the family and group level in PeopleSoft Supply Planning.

Restrictions to Changing the Item Type

You cannot change the item type of the item until all transactions against the item are complete. You need to shut down your business against this item, make the type change, and then resume business as usual. PeopleSoft provides you with a page that lists all the transactions that need to be resolved before the item type change can be made. The Item Type Errors page includes links to the appropriate PeopleSoft pages where you can make the necessary changes to complete or cancel transactions.

To change the item type, the item ID cannot be used:

- On an open material stock request (MSR) in PeopleSoft Inventory, including interunit transfers. You must cancel the MSR or complete the shipment and place the order in the *Depleted* fulfillment state.

- On an open or pending sales order in PeopleSoft Order Management. Any sales orders with a product ID that is associated with the item ID must be closed or canceled.

- On an open work order in PeopleSoft Maintenance Management.

- On a putaway transaction in the putaway staging interface table (STAGED_INF_INV) in PeopleSoft Inventory.

- On an open receipt, requisition, purchase order, purchase order contract, RFQ (request for quote), or RTV (return to vendor) transaction in PeopleSoft Purchasing.

- On an eProcurement requisition or in the PV_CP_LOAD table in PeopleSoft eProcurement.

- On a BOM. routing, or production ID in PeopleSoft Manufacturing.

- On a task, routing or production operation as a subcontracted item within PeopleSoft Manufacturing.

- In a material storage location (MSL) in a PeopleSoft Inventory business unit. The item quantity must not be a positive quantity or a negative quantity (if you have enabled the negative inventory feature). All the MSLs must be adjusted to zero quantity for this item ID.

- On a counting event in PeopleSoft Inventory.

- On an RMA (return material authorization).

- On any pending inbound transactions located in the staging tables. This includes data from EIPs, transaction pages, and any system generated transactions.

- On an India tax calculation transaction, such as a shipping excise invoice.

- As a supplier managed inventory (VMI) item in PeopleSoft Inventory.

- Used in a par location in PeopleSoft Inventory.

- As a substitute item for another item ID.

Additional Changes

In addition to the changes highlighted in the Item Type Errors page, there are other changes you must make, including:

- *Source Codes:* When changing an inventory item type, the source code must change as well. Non-Inventory items can only have source codes of Expense or Planning. Inventory items can not use the Expense or Planning source codes.

- *Product IDs:* When changing an item that already exists as a product ID in PeopleSoft Order Management from an inventory to a non-inventory item type, the product now needs a default cost element on the product definition, whereas this is not required for products associated with inventory items.

Pages Used to Change the Item Type

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Item - General: Common Page	INV_ITEMS_DEFIN1	**Items** > **Define Items and Attributes** > **Define Item** > **General**	Define or change general item information at the SetID level, including the inventory item type. Select the Inventory Item check box to change this item ID to an inventory item type. Deselect the **Inventory Item** check box to change this item ID to a non-inventory item type.
Catalog Maintenance Template	ITM_MASS_TMPLT	**SCM Integrations** > **Setup** > **Catalog Maintenance Template**	Create catalog maintenance templates that serve as guides to the fields and records that can be updated by the assigned role users.

Page Name	Definition Name	Navigation	Usage
Catalog Maintenance Extract	PO_EXPORT_CRITERIA	**SCM Integrations > Process Transactions > Items > Catalog Maintenance Extract**	Select the item record to download and run the extract process to move data from the item master tables to the item staging tables.
Catalog Maintenance Update	PO_MASS_UPDATE	**SCM Integrations > Process Transactions > Items > Catalog Maintenance Update**	Select item data records and fields that you want to update. Specify the values with which you want to update the item data. After you save the information that you enter in this component, you can return and carry out the same item data changes by selecting the same control ID.
Item Loader	RUN_IN_ITMLOAD	**SCM Integrations > Process Transactions > Items > Item Loader**	Run the Item Loader process to validate data in the Item Loader staging tables and update the PeopleSoft master data tables.
Data Definition Maintenance - Errors	IN_EIP_ITEM_MAINT	**SCM Integrations > Transaction Error Handling > Maintain Data Definitions. Select the ITEM transaction type > and click the Search button. Click the Show Detail Entry button for the desired row to view the error.**	Access the error details of Item Loader data. Use the Item Type Errors link to access the Item Type Errors page.
Item Type Errors	IN_ITEMTYPE_SEC	• For an existing item ID, select or deselect the **Inventory Item** check box on the Define Item - General: Common page and save the page. • **SCM Integrations > Transaction Error Handling > Maintain Data Definitions. Select the Transaction Type of ITEM and click the Search button. Click the Show Detail Entry icon and then select the Item Type Errors link.**	Displays any transactions that prevent an item ID from changing the item type and provides links to other PeopleSoft page to resolve the transactions. This page only displays if there are transactions preventing the item type change.

Define Item - General: Common Page

Use the Define Item - General: Common page (INV_ITEMS_DEFIN1) to define or change general item information at the SetID level, including the inventory item type.

Select the Inventory Item check box to change this item ID to an inventory item type. Deselect the Inventory Item check box to change this item ID to a non-inventory item type.

Navigation:

Items > **Define Items and Attributes** > **Define Item** > **General**

This example illustrates the fields and controls on the The Define Item - General: Common page. You can find definitions for the fields and controls later on this page.

Use this page to change the item type for one item ID at a time.

Field or Control	Description
Inventory Item	Select this check box to change this item ID to an inventory item type (a value of *Y* in the INVENTORY_ITEM field in the MASTER_ITEM_TBL record). Deselect this check box to change this item ID to a non-inventory item type (a value of *N*).
Non-Owned Item	A non-inventory item cannot be non-owned.
Consigned Purchase	A non-inventory item cannot be consigned.

Once you have changed the item type from *inventory* to *non-inventory* and clicked the Save button:

- A warning message is displayed if there are cost profiles that exist for any business unit that is using this particular SetID. If you click the OK button to continue past this warning, then the cost profiles

are deleted, the cost element is set to blank on the BU_ITEMS_INV record, and the source code is changed to expense.

- The Item Type Errors tab is displayed within this Define Items component. This tab only displays if there are outstanding transactions or stocked inventory quantities that prevent the system from changing the item type. The data on this tab can be downloaded to a Microsoft Excel spreadsheet for further analysis.

Warning message issued concerning cost profiles and source code

This example illustrates the fields and controls on the Warning message issued concerning cost profiles and source code. You can find definitions for the fields and controls later on this page.
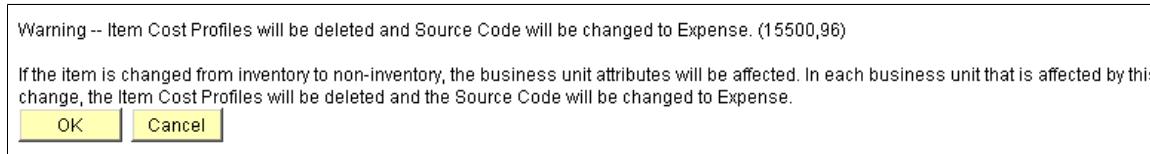
The Define Items component displaying the seventh tab, Item Type Errors (partial page shot)

This example illustrates the fields and controls on the The Define Items component displaying the seventh tab, Item Type Errors (partial page shot). You can find definitions for the fields and controls later on this page.
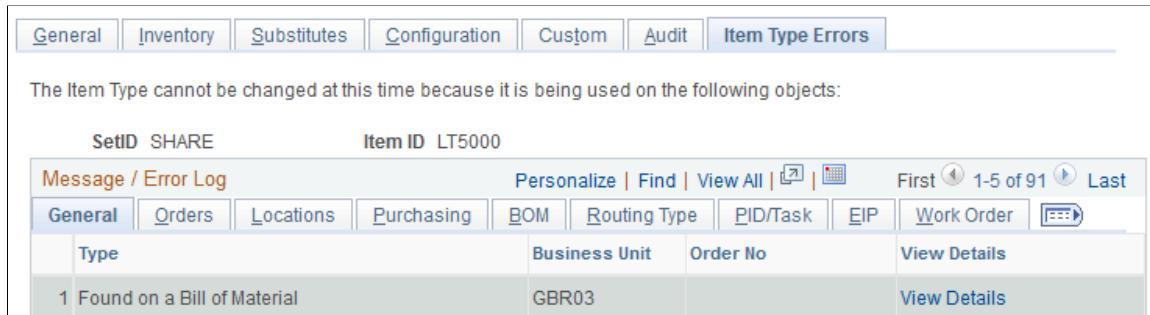
Using the Item Loader Process to Change the Item Type

The Item Loader process can be used to change the inventory item type. This method is especially useful when you want to change a large group of items at the same time. To use the Item Loader to changed the item type:

1. Use the Catalog Maintenance Template component to create a template that defines which records and fields can be extracted from the item master tables and updated. Define the INVENTORY_ITEM field in the MASTER_ITEM_TBL record.

2. Run the Catalog Maintenance Extract (PO_EXPORT_CRITERIA) process. This process enables you to download items from the MASTER_ITEM_TBL record to the corresponding Item Loader staging table, MASTER_ITEM_EC. If there is already data in the ITM_LOAD_MST_EC or MASTER_ITEM_EC records for this item, then the item type cannot be changed since there are other pending changes to this item ID.

3. Run the Catalog Maintenance Update (PO_MASS_UPDATE) process to update the value of the field INVENTORY_ITEM in the staging table, MASTER_ITEM_EC.

4. Run the Item Loader (IN_ITMLOAD) process to validate and make the change. If the change is not allowed then error messages appear in the item loader error table (ITEMLOAD_ERR). Records with invalid data remain in the Item Loader staging tables with an *Error* status. You can edit them online by using the Data Definition Maintenance component which contains a link to the Item Type Errors page where you can view the outstanding transactions that prevent the item type change. After correcting the data errors, you can rerun the Item Loader process to populate the master data tables with the corrected item records.

Related Links

Understanding Item Catalog Maintenance
Item Loader Page
Editing Data Errors in the Item Loader Staging Tables

Item Type Errors Page

Use the Item Type Errors page (IN_ITEMTYPE_SEC) to displays any transactions that prevent an item ID from changing the item type and provides links to other PeopleSoft page to resolve the transactions.

This page only displays if there are transactions preventing the item type change.

Navigation:

*   For an existing item ID, select or deselect the **Inventory Item** check box on the Define Item - General: Common page and save the page.

*   **SCM Integrations** > **Transaction Error Handling** > **Maintain Data Definitions. Select the Transaction Type of ITEM and click the Search button. Click the Show Detail Entry icon and then select the Item Type Errors link.**

General

Select the General tab of the Item Type Errors page.

This example illustrates the fields and controls on the The General tab of the Item Type Errors page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Type	Describes the problem with the item ID that prevents the change in inventory item type.
Business Unit	Displays the inventory business unit.
Order No	Displays the order number within the inventory business unit. This could be a sales order or materials stock request.
View Details	Click to access the Cancel/Hold Stock Requests page for material stock requests or the Order Entry Form for sales orders. These pages enable you to cancel the order. It the item is currently or scheduled to be a substitute for another inventory item at the business unit level, then you cannot change it to be a non-inventory item. Click the link to access the Define Business Unit Item component for the item using the substitute where you can remove your item from the substitute list.

Orders

Select the Orders tab of the Item Type Errors page.

This example illustrates the fields and controls on the The Orders tab of the Item Type Errors page. You can find definitions for the fields and controls later on this page.

Each order that is inserted into the demand table (IN_DEMAND) is identified by eight fields that make up its demand key: inventory business unit, demand source, source business unit, order number, order line, schedule line number, demand line number and item ID. This tab displays seven of these fields. The item ID is defined at the Define Items component level.

Field or Control	Description
Business Unit	Displays the inventory business unit.
Demand Source	Displays the PeopleSoft application that originally created the order; including: • *IN*: Demand originating in a PeopleSoft Inventory business unit. • *OM*: Demand originating as a sales order in a PeopleSoft Order Management business unit. • *PL*: Demand created by the Apply Planning Updates process for new planned messages originating from PeopleSoft Supply Planning. • *PR*: Demand created from requisitions in the PeopleSoft Purchasing sourcing processes. • *RT*: Demand to return stock to a supplier. This demand source is based on a return-to-vendor request created using the Express Issue component. • *WM*: Demand created by a work order from a PeopleSoft Maintenance Management business unit.
Source Bus Unit	Displays the business unit that created the order.

Field or Control	Description
RMA Number	For return materials authorization (RMA) transactions, this column displays the unique identification number for this RMA. Click the link to access the RMA Form page.
Excise Document Number Series	For shipping excise invoices, this column displays the excise document number series used to create a unique excise invoice number for this transaction.
Excise Invoice Number	Displays the excise invoice number assigned to this shipping excise invoice. India tax processing treats inventory items differently than non-inventory items, so you cannot change the item type if it is currently being processed through the India tax process. Click the link to access the Shipping Excise Invoice page.

Locations

Select the Locations tab of the Item Type Errors page.

This example illustrates the fields and controls on the The Locations tab of the Item Type Errors page. You can find definitions for the fields and controls later on this page.

This tab displays the material storage locations (MSL) within the inventory business unit that still contain stock of this item ID. All the MSLs must be adjusted to zero quantity. The MSL must not contain a positive quantity or a negative quantity (if you have enabled the negative inventory feature). Click the link to access the Adjustments page where you can create an adhoc adjustment to bring the quantity to zero in each MSL.

Field or Control	Description
Par Location ID	Displays the par location using the item ID. The item cannot be changed from an inventory item to a non-inventory item if it is currently defined as a stock item on the par definition (CART_TEMPL_INV) table. Click the link to access the Par Location Definition component.

Purchasing

Select the Purchasing tab of the Item Type Errors page.

This example illustrates the fields and controls on the The Purchasing tab of the Item Type Errors page. You can find definitions for the fields and controls later on this page.

From PeopleSoft Purchasing, this tab displays any purchase orders, receipts, requisitions, RFQ (request for quotes), return to vendor transactions, or buying agreements that contain the item ID you want to change.

Field or Control	Description
PO Number	Click the link to access the Maintain Purchase Order - Purchase Order page.
Receipt Number	Click the link to access the Maintain Receipts - Receiving page.
Requisition ID	Click the link to access the Maintain Requisitions - Requisition page.

Field or Control	Description
RFQ ID	Click the link to access the Request Quotes page.
Return To Vendor ID	Click the link to access the RTV page where you can cancel the RTV.

BOM

Select the BOM tab of the Item Type Errors page.

This example illustrates the fields and controls on the The BOM tab of the Item Type Errors page. You can find definitions for the fields and controls later on this page.

From PeopleSoft Manufacturing, this tab displays bill of materials (BOM) information that contains the item ID you want to change. The item type cannot be changed if the item ID is on a BOM.

Field or Control	Description
BOM State	Displays the nature of BOM. Values are: • *Engineering:* Select to view EBOMs. • *Manufacturing:* Select to view MBOMs.

Field or Control	Description
BOM Type	Displays the type of BOM. Values are: • *Production:* Manufacturing BOMs used in manufacturing assemblies or end items. • *Rework:* Rework BOMs used in a standard rework process that involves adding components.
BOM Code	Displays the BOM priority code used to manufacture the item. Click the link to access the Delete BOMs page.

Routing Type

Select the Routing Type tab of the Item Type Errors page.

This example illustrates the fields and controls on the The Routing Type tab of the Item Type Errors page. You can find definitions for the fields and controls later on this page.

From PeopleSoft Manufacturing, this tab displays routing information that contains the item ID you want to change.

Field or Control	Description
Routing State	Displays the nature of routing. Values are: • *Engineering* • *Manufacturing*

Field or Control	Description
Routing Type	Displays the type of routing. Options are: • *Production:* Used for standard manufacturing processes. • *Rework:* Used for standard rework processes. • *Teardown:* Used for breaking down an assembly into its component parts and returning the components back to inventory.
Routing Code	Displays the unique numeric identifier of the routing. Click the link to access the Define Routings page.

PID/Task

Select the PID/Task tab of the Item Type Errors page.

This example illustrates the fields and controls on the The PID/Task tab of the Item Type Errors page. You can find definitions for the fields and controls later on this page.

From PeopleSoft Manufacturing, this tab displays production IDs (PIDs) that contains the item ID you want to change.

Field or Control	Description
Production ID	Click the link to access the Update Operation List component for this production ID where you can delete operations using this item ID.
Task Code	Displays a unique identifier for the specified task. Click the link to access the Define Task - Definition page.

EIP

Select the EIP tab of the Item Type Errors page.

This example illustrates the fields and controls on the The EIP tab of the Item Type Errors page. You can find definitions for the fields and controls later on this page.

Before changing the item type of an item, check your organization's use of enterprise integration points (EIPs) to sent data into the PeopleSoft Inventory system. If the item ID has been changed from inventory to non-inventory and then the item ID is used on a message transaction loading to an Inventory business unit, the transaction will fail. Use the Data Def Maint (data definition maintenance) component or the Transaction Maintenance component to review incoming messages. Delete lines in the message that refer to the item that has now become a non-Inventory item. Click the link on the EIP Control ID to access the Transaction Maintenance component.

Work Order

Select the Work Order tab of the Item Type Errors page.

This example illustrates the fields and controls on the The Work Order tab of the Item Type Errors page. You can find definitions for the fields and controls later on this page.

From PeopleSoft Maintenance Management, this tab displays work order information that contains the item ID you want to change. The inventory item type cannot be changed if there are open tasks that contain this item (both requirements and scheduled).

Field or Control	Description
Work Order ID	Displays the unique number identifying the work order. Click the link to access the Work Order page where you can alter the task lines containing this item ID.
Task Number	Identifies the task associated with the work order ID.
Requirement Line Number	Displays the line number of the inventory parts requirement for a work order.
Projection ID	Displays the unique number used to identify the preventive maintenance projection using this item ID.
Template ID	Displays the identification number for the work order template.

Chapter 3

Defining Item Control Values

Understanding Item Control Values

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

Setting Definitions for Item Control Values

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

This topic discusses how to set definitions for Item control values:

Pages Used to Set Definitions for Item Control Values

Page Name	*Definition Name*	*Usage*
Brand Names Page	BRAND_NAMES_INV	To associate inventory items with brand names that are valid over specific time periods, use the Brand Names (PROD_BRAND_NAME_GBL) component. Brand names that are defined on this page are informational only and are not used by PeopleSoft Inventory. If you select the **Item Approval Required** option on the Installation Options - Overall/GL (installation options - overall/general ledger) page, items must be approved before you can assign brand names.
Charge Codes Page	CHARGE_CODE_INV	Define charge codes that define how items should be charged when consumed from a par location.

Page Name	Definition Name	Usage
Grades Page	PRODUCT_GRADE_INV	To define internal rating levels for items and lots, use the Grades (PRODUCT _GRADE_INV_GBL) component. The information defined on this page is used on the Define Item - General: Classifications page, the Static Item Templates page, and the Lot Control Information page.
Hazard/Disposal Codes Page	HAZARD_TYPE_INV	To define hazard codes, use the Hazard/ Disposal Codes component (INV_ HAZ_TYPES_GBL). Define codes for any special handling instructions. The information that is defined in this page is used on the Static Item Templates page and the Define Item - General: Classifications page.
Item Attributes Group Page	EN_CHGOVER_GRP	If you use PeopleSoft Supply Planning, use the Item Attributes Group (EN_ CHGOVER_GRP_GBL) component to set up attribute groups. Items that belong to specific attribute groups can be assigned to specific resources (for example, crews, machines, and tools). If you are using PeopleSoft Supply Planning, you must define item attribute groups to assign resource changeover penalties on the Crews - Changeover page, the Machines - Changeover page, or the Tools - Changeover page in the PeopleSoft Manufacturing application.
Item Default Values Page	INV_ITEM_DEFAULTS	Define item default values to establish item attributes that are automatically assigned to each new item. All inventory items in the SetID can share these attributes.
Item Families Page	PROD_FAMILY_INV	Establish item family options.
Family Rtg Assignment Page (family routing assignment)	EN_RTG_FAMILY	Assign items to item families by using the Item Family Routing (EN_RTG_ FAMILY_GBL) component. If you are using PeopleSoft Manufacturing, you can define a routing for each item that you manufacture. To reference another item's routing, use the Define Business Unit Item - Manufacturing: General page.

Page Name	Definition Name	Usage
Item Groups Page	INV_ITEM_GROUP	Assign items to item groups to group similar items together.
Group Rtg Assignment (group routing assignment)	EN_RTG_GROUP	Use the Item Group Routing (EN_RTG _GROUP_GBL) component to assign items to item groups. If you are using PeopleSoft Manufacturing, you can define a routing for each item that you manufacture.
Item Number Control	ITEM_NBR_CONTROL	Define item numbering to determine whether new inventory items are sequentially numbered or manually numbered.
Static Item Templates	INV_ITEM_TEMPLATES	Establish static item templates to create various sets of item attribute defaults, which are used when defining new items.
Item Types	INV_ITEM_TYPES	To group inventory items by function, use the Item Types (INV_ITEM_TYPES _GBL) component. For example, you can group expense, service, or inventory items. The information that is defined on this page is used on the Define Item - General: Classifications page and the Defining Purchasing Item Categories page.
Manufacturers	MANUFACTURER	Select a default universal item ID for a manufacturer, and determine whether the manufacturer is locally owned.
MSDS Identifiers (material safety data sheet identifiers)	MSDS_ID_INV	To create IDs for items that require a material safety data sheet (MSDS), use the MSDS Identifiers (ITEM_MSDS _ID_GBL) component. PeopleSoft Inventory does not provide standard MSDS documents. Instead, you define an informational code to be used when processing items in the system. The information that is defined here is used on the Define Item - Inventory: Shipping/Handling page.

Page Name	Definition Name	Usage
Packing Codes	PACKING_CODE_INV	To create informational codes for items that require special packing routines, use the Packing Codes component (PACKING_CODE_GBL). The information that is defined on this page is used on the Define Item - Inventory: Shipping/Handling page, on the Define Business Unit Item - Inventory: Weight/ Volume page, in the Packing Session component (PACK_EST_SHIP_GBL), and on the Static Item Templates page.
Demand Priority Family	PL_PRIO_FAMILY	Group items in demand priority families by setting up demand priority groups that you can then associate with an item.
Potency Codes	POTENCY_CODE_INV	To create informational codes to specify an item's potency, use the Potency Codes (POTENCY_CODE_INV_GBL) component. The information that is defined on this page is used on the Define Item - General: Classifications page.
Replenishment Classes	INV_REPLEN_CLASS	To create groupings for items that are subject to automated periodic replenishment within a business unit, use the Replenishment Classes (REPLENISH_CLASS_GBL) component. The information that is defined on this page is used on the Define Business Unit Item - Inventory: Replenishment page, the Replenishment Parameters page, and the Replenishment Options page.
Stock Types	INV_STOCK_TYPE	To create ownership information codes for items that are leased or consigned, use the Stock Types (INV_STOCK_TYPE_GBL) component. A stock type must be assigned during putaway of non-owned items. The information that is defined on this page is used on the Define Item - General: Classifications page, the Static Item Templates page, the Define Item - Inventory: Shipping/ Handling page, the Manual Staging page, and the Express Putaway page.

Page Name	Definition Name	Usage
Stocking Periods	STOCK_PERIOD_INV	Define stocking periods by setting up time-phased safety stock and excess stock levels for PeopleSoft Supply Planning. You can also populate this page by either uploading data from a third-party forecasting system or using PeopleSoft Inventory Planning and Demand Planning.
Storage Rules	STOR_INSTRUCT_INV	To define special storage requirements for items, use the Storage Rules (STOR_INSTRUCTION_GBL) component. The information that is defined on this page is used on the Define Item - Inventory: Shipping/Handling page, the Static Item Templates page, and the Putaway Detail page.
Universal Item ID Types	UPN_TYPE_CD	Define universal item ID types at the SetID level, and determine whether the ID represents a GTIN.
Utilization Types	UTIL_TYPE_INV	Define utilization types define the ABC classifications to use in the environment. For example, you may decide to classify items as *A, B,* and *C,* or *High, Medium,* and *Low.* The Utilization Type Calculation process assigns utilization types to individual items by business unit and utilization group. On the Perform Physical Accounting pages, utilization types are selected in alphabetical order.
Util Group Inv (utilization group - inventory)	UTIL_GROUP_INV	Define utilization groups for each ABC utilization grouping that you want to maintain in the system. For example, establish utilization groups for cycle counting, planning, material handling, or performance reporting. Each utilization group can use different parameters to assign items to a specific utilization type. For example, the inventory control supervisor may consider an item to be a *C* item because it is a slow mover, but the purchasing department may consider that same item to be a *B* item because of its lead time.

Charge Codes Page

Use the Charge Codes page (CHARGE_CODE_INV) to define charge codes that define how items should be charged when consumed from a par location.

Navigation:

Items > **Define Controls** > **Define Item Charge Codes**

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

Related Links

"Understanding Par Location Management" (PeopleSoft Inventory)

Item Default Values Page

Use the Item Default Values page (INV_ITEM_DEFAULTS) to define item default values to establish item attributes that are automatically assigned to each new item.

All inventory items in the SetID can share these attributes.

Navigation:

Items > **Define Controls** > **Item Default Values**

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

Field or Control	Description
Item Tracking	Select a value to define the type of stocking control that is most commonly used by items in this SetID.
Lot	Select when inventory items are either produced or otherwise grouped in distinct and identifiable subsections, often referred to as *lots*. Lots often represent production runs. Default values for items that are not lot-controlled are defined on the Installation Options - Inventory page.
Serial	Select when each inventory item in stock is managed in units of one. Default values for items that are not serial-controlled are defined on the Installation Options - Inventory page.
Ship Serial	Select when serial tracking is required only at the time of shipment. Ship-serial items can be moved throughout the inventory business unit without serial control, which simplifies transaction processing and entry. Serial numbers are then assigned at the time of shipment to provide serial tracking on products that are shipped to customers, internal locations, and other inventory business units.

Field or Control	Description
Non-Owned Item	Select if the majority of the items are maintained in inventory but not owned by the business unit.
Create Product	Select when a product ID is to be created the majority of the time. The product ID will be created when you save the Define Item component.
Item Type	Select an item type if the majority of the items will use the same value.
Costing Group	Select a cost profile group if the majority of the items will use the same value.
Category Code	Select a category code if the majority of the items will use the same value.
Cost Element	Select a cost element if the majority of the items will use the same value.
UPN Type Code	Select a universal item ID type code to be used for entering a global trade item number within a SetID. This value also determines which universal item identifier represents GTIN data when you are publishing to the UCCNet, and the GTIN to use when you are generating RFID tags.

Related Links

"PeopleSoft SCM Inventory Implementation" (PeopleSoft Inventory)
"Understanding Consigned Purchases in Inventory Management" (PeopleSoft Inventory)

Item Families Page

Use the Item Families page (PROD_FAMILY_INV) to establish item family options.

Navigation:

Items > Define Controls > Item Families

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

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

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

Related Links
"Understanding Routings" (PeopleSoft Manufacturing)

Item Groups Page

Use the Item Groups page (INV_ITEM_GROUP) to assign items to item groups to group similar items together.

Navigation:

Items > **Define Controls** > **Item Groups**

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

Item Number Control Page

Use the Item Number Control page (ITEM_NBR_CONTROL) to define item numbering to determine whether new inventory items are sequentially numbered or manually numbered.

Navigation:

Items > **Define Controls** > **Item Number Control**

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

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

Static Item Templates Page

Use the Static Item Templates page (INV_ITEM_TEMPLATES) to establish static item templates to create various sets of item attribute defaults, which are used when defining new items.

Navigation:

Items > **Define Controls** > **Static Item Templates**

This example illustrates the fields and controls on the Static Item Templates page. You can find definitions for the fields and controls later on this page.

Use the static item template to automatically populate a new item with the item attributes defined on the static item template. After entering the required information on the Define Item - General pages, you can select the template ID on the Define Item - General: Classifications page to populate these item attributes in the rest of the component. You can override these default values. Static item template modifications do not change existing item data.

Static item templates provide a few item attributes for new items with limited needs. For a more robust item template, use the configurable item templates. For configurable item templates, see the "Using Configurable Item Templates to Create Items" topic of this product documentation.

See Understanding Configurable Item Templates.

Demand Priority Family Page

Use the Demand Priority Family page (PL_PRIO_FAMILY) to group items in demand priority families by setting up demand priority groups that you can then associate with an item.

Navigation:

Items > **Define Controls** > **Demand Priority Family**

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

Stocking Periods Page

Use the Stocking Periods page (STOCK_PERIOD_INV) to define stocking periods by setting up time-phased safety stock and excess stock levels for PeopleSoft Supply Planning.

You can also populate this page by either uploading data from a third-party forecasting system or using PeopleSoft Inventory Planning and Demand Planning.

Navigation:

Items > **Define Items and Attributes** > **Define Stocking Periods**

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

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

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

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

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

1. Create a flat file by running the Inventory Policy Export process in PeopleSoft Inventory Policy Planning.

2. Upload the file using the Forecast/Replenishment process in PeopleSoft Demand Planning.

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

Related Links

"Integrating With a Third-Party Forecast Planning Application" (PeopleSoft Inventory)

Utilization Types Page

Use the Utilization Types page (UTIL_TYPE_INV) to define utilization types define the ABC classifications to use in the environment.

Create utilization types to define the ABC classifications to be used in the environment. Utilization types can be used to classify inventory items for numerous reasons including cycle counting, planning, material handling, or performance reporting. For example, you may decide to classify items as A, B, and C, or High, Medium, and Low. The Utilization Type Calculation process assigns utilization types to individual items by business unit and utilization group.

Utilization types that are assigned to an item ID can be viewed on the Define Business Unit Item - Inventory: Utilization Types page.

Navigation:

Items > **Define Controls** > **Define Utilization Types**

Util Group Inv Page

Use the Util Group Inv (utilization group - inventory) page (UTIL_GROUP_INV) to define utilization groups for each ABC utilization grouping that you want to maintain in the system.

For example, establish utilization groups for cycle counting, planning, material handling, or performance reporting. Each utilization group can use different parameters to assign items to a specific utilization type. For example, the inventory control supervisor may consider an item to be a C item because it is a slow mover, but the purchasing department may consider that same item to be a B item because of its lead time.

Navigation:

Items > **Define Item Controls** > **Utilization Groups**

Field or Control	*Description*
For Cycle Count	Select to make this the default utilization group for cycle counting. Anytime that you change the default, the system updates the Counting Event Utilization Types table (COUNT_UTIL_INV).

Note: If you use the Due to Count cycle-counting method, you must define a default cycle count group; otherwise, you receive an error message on the Counting Event - Utilization Types page. |
| **For Planning** | Select to make this the default utilization group for inventory planning. You can override this default on the Define Business Unit Item - Inventory: Utilization Types page. |

Field or Control	Description
Build Group Items	Click to add all items that meet the criteria that is defined in the **Utilization Group Details** group box to this utilization group. This link adds the appropriate items to the Business Unit Item Utilization Code table (BU_ITEM_UTIL_CD). If you click the link for an existing utilization group, the system replaces all items with items that meet the criteria that is specified here.

Chapter 4

Defining Items by SetID

Defining Items at the SetID Level

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

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

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

This topic discusses how to define Items at the SetID Level:

Pages Used to Define Items at the SetID Level

Page Name	Definition Name	Usage
Define Item - General: Common Page	INV_ITEMS_DEFIN1	Define general item information at the SetID level.
Define Item - Item Image Page	INV_ITEM_IMAGE_SEC	Maintain an image of an item. Define Item - General: Common Page
Define Item - Manufacturer's Item Page	ITM_MFG_SP	Define information about the item's manufacturer. Define Item - General: Common Page
Define Item - General: Classifications Page	INV_ITEMS_DEFIN4	Define additional item attributes.
Define Item - General: Classifications 2 Page	GS1_CLAS2_INV_DEF	Define healthcare item attributes.
Define Item - General: Dimensions Page	INV_ITEMS_DEFIN3	Define item dimensions such as weight, volume, size and color.
Define Item - General: Usage Page	INV_ITEMS_DEFIN8	Define material usage attributes for an item at the SetID level.

Page Name	Definition Name	Usage
Define Item - Inventory: Tracking/Description Page	INV_ITEMS_DEFIN2	Establish tracking item and lot-control attributes.
Define Item - Inventory: Shipping/Handling Page	INV_ITEMS_DEFIN5	Establish item shipping and handling attributes.
Define Item - Substitutes Page	INV_ITEMS_DEFIN7	Establish or maintain substitute items.
Define Item - Configuration Page	INV_ITEMS_DEFIN6	Define configuration attributes for an item if you are using PeopleSoft Product Configurator.
Define Item - Custom1: Character Page	INV_ITEMS_DEFIN9	Define alphanumeric field values at the SetID level for item attributes that are unique to the enterprise.
Define Item - Custom1: Numeric Page	INV_ITEMS_DEFIN10	Define numeric field values at the SetID level for item attributes that are unique to the enterprise.
Define Item - Custom2: Character Page	INV_ITEMS_DEFIN11	Define additional alphanumeric field values at the SetID level for item attributes that are unique to the enterprise.
Define Item - Custom2: Numeric Page	INV_ITEMS_DEFIN12	Define additional numeric field values at the SetID level for item attributes that are unique to the enterprise.

Define Item - General: Common Page

Use the Define Item - General: Common page (INV_ITEMS_DEFIN1) to define general item information at the SetID level.

Navigation:

Items > **Review Item Information** > **Review Item SetID Attributes** > **General**

Items > **Define Items and Attributes** > **Define Item** > **General**

This example illustrates the fields and controls on the Define Item - General: Common page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Item ID	Item IDs cannot have embedded spaces or special characters. If you use automatic numbering for items, leave the item ID as *NEXT,* to assign the next sequential number, or enter an item ID manually. PeopleSoft Inventory uses the item ID as its primary search key for the item master file.
Current Status Date	If you modify the item status, the current status date is automatically updated to reflect the date of the change.
Current Status	Select a value: *Under Initialization, Pending Approval, Denied Approval, Active, Hold, Discontinue,* or *Inactive.* However, you can select only a subset of these status values. If the item is *Under Initialization,* you can set the **Current Status** field to *Pending Approval.* After the item definition is approved, either automatically or manually, you can set the status to *Hold* or *Discontinue.*
Future Status Date and **Future Status**	Enter a date and a status that the Change Item Status (RUN_ INS4000) process implements. **Note:** You cannot select a future status of *Inactive* for certain items. If an item is defined for a business unit and used in PeopleSoft Manufacturing on the Define Business Unit Item - General: Costing page **(Used for MFG** option), it cannot be inactivated at the business unit or the SetID level.
Copy Item Status	Click to access the Copy SetID to BU Item Status page, where you can copy the item status for the SetID to any of the business units for which the item is defined.

Field or Control	Description
Inventory Item	Select this check box to define this item ID as an inventory item type. An inventory item can be physically stocked in a PeopleSoft Inventory business unit and used on a material stock request. Deselect this check box to define this item ID to a non-inventory item type. You cannot create transactions in PeopleSoft Inventory for non-inventory items. The attributes that you enter for a non-inventory item at the business unit level are to support PeopleSoft Order Management, Purchasing, Maintenance Management, Manufacturing and PeopleSoft Supply Planning. Both inventory and non-inventory items can be: • Added to sales orders in PeopleSoft Order Management. • Added to requisitions and purchase orders in PeopleSoft Purchasing. • Added to work orders and job templates in PeopleSoft Maintenance Management. • Defined on a Bill of Materials (BOM) in PeopleSoft Manufacturing. • Used in forecasts at both the family and group level in PeopleSoft Supply Planning. After you have used an item ID in the PeopleSoft system, you may want to change the item from an inventory item type to a non-inventory item type or conversely, change from a non-inventory to an inventory item type. There are certain restrictions to changing the inventory item type once you have used the item ID on transactions in the PeopleSoft system. For more information, see the "Working with Items" topic, "Changing the Item Type" topic of this product documentation. See Changing the Item Type.
Non-Owned Item	This selection can be overridden on the Define Business Unit Item - General: Common page. PeopleSoft Inventory does not create accounting entries for non-owned item transactions. To identify the owner of the stock, you must also indicate the stock type on the Define Item - General: Classifications page. You can change the selection at the time of putaway by using the Manual Staging page or the Express Putaway page.
Consigned Purchase	This option is available if the item is non-owned. The selection that you make is supplied by default at the business unit level, and you cannot override it on the Define Business Unit Item - General: Common page.

Field or Control	Description
Standard UOM	Select the standard UOM for this item ID. PeopleSoft Inventory maintains the quantity on hand for an item and its cost in the standard UOM. It is recommended that you select the smallest valid UOM for the item. Keep in mind the following points when selecting a standard UOM: • The UOMs that you establish on the Units of Measure page under the Common Definitions menu are available for selection (Set Up Financials/Supply Chain, Common Definitions, Units of Measure, Units of Measure). • The measurement that you select must be valid for stocking, shipping, and ordering on the item's Units of Measure page (Items, Define Items and Attributes, Units of Measure). • Because of the quantity-on-hand and the costing calculations, you cannot change this selection for an item after the first transaction in PeopleSoft Inventory. These transactions include setting up an item supplier relationship on the Purchasing Attributes - Item Supplier page (Items, Define Items and Attributes, Purchasing Attributes, Item Supplier). *Warning!* To minimize rounding discrepancies when using multiple UOMs, use the smallest valid UOM for the item as the standard UOM, and use *whole number* as the quantity precision on the item's Unit of Measure page.
Default Category	You must select a value if you have PeopleSoft Purchasing installed to categorize the item appropriately for the purchasing catalogs.
Physical Nature	Select the option of *Goods* or *Services,* which classifies the item for intransit reporting requirements between countries.
Item Group and **Family**	These are categorizations for reporting or alternate search keys. Item groups can be used when you are defining transaction accounting rules, and item families can be used during cycle counting.
Demand Priority	If you are using PeopleSoft Supply Planning, this option enables you to group like items to establish a common priority for all items within a single group. The demand priorities can then be established for both planning applications. You define demand priority families by using the Demand Priority Family page.

Field or Control	Description
Cost Profile Group	Assigning an item to a cost profile group determines the books that the item uses when accounting for the item. When you add this item to a business unit, the Define Business Unit Item - General: Costing page uses this field to determine the cost profile of the item within each book that the business unit uses. Be aware of these conditions: If the item is not serial controlled, the cost profile group that you assign to the item cannot be associated with any profiles that have serial ID as the deplete cost method or the cost flow. If the item is not lot controlled, the cost profile group that you assign to the item cannot be associated with any profiles that have lot ID as the deplete cost method or the cost flow.
Promise Option	(Optional) Select a value: *Perform ATP Reservations* (perform available-to-promise reservations): Select this option to enable customer service representatives who are using PeopleSoft Order Management to promise the item at the time of order, or to enable the Reserve Materials process (IN_FUL_RSV) in PeopleSoft Inventory to promise demand for the item based on anticipated supply. **Important!** To ensure accurate validation, you must complete item definition at the SetID and business unit levels and specify non-soft-reservations processing for the item before you select the *Perform ATP Reservations* value. For step-by-step procedures for setting up ATP-reserved items, see Understanding ATP-Reservations.
Create Product	Select if the enterprise uses product IDs, and you want the system to create a product ID when you save the item definition.
Use Item ID	Select to use the item ID as the product ID in PeopleSoft Order Management.
Product ID	If you do not select the **Use Item ID** option, you can enter a value in this field or, if you set up automatic numbering for products, you can enter a value of *NEXT.* These options are available only if PeopleSoft Order Management is installed and you are in Add mode or if you are updating an item that has a status of *Under Initialization.*
Item Image	Click to access the Item Image page, where you can add, remove, or view a picture of the item.

Field or Control	Description
Manufacturers	Click to access the Manufacturer's Item page, where you can define information about the items' manufacturer.
Purchasing Item Attributes	Click to access the Purchasing Attributes (ITM_TBL_PUR) component, where you can specify purchasing information for the item. You can access the Purchasing Attributes component only after the item is initially saved.
Units of Measure	Click to access the Units of Measure (INV_ITEM_UOM) component, where you can assign additional UOMs to the item. You can access the Unit of Measure component only after the item is initially saved.

Related Links

Item Number Control Page

Manufacturer's Item Page

Managing Inventory by Item Status

Updating Item Status

"Understanding Receiving and Putaway Processing" (PeopleSoft Inventory)

"Understanding Reservations for Different Types of Items" (PeopleSoft Inventory)

"Defining Purchasing Item Attributes" (PeopleSoft Purchasing)

Define Item - General: Classifications Page

Use the Define Item - General: Classifications page (INV_ITEMS_DEFIN4) to define additional item attributes.

Navigation:

Items > Review Item Information > Review Item SetID Attributes > General: Classifications

Items > Define Items and Attributes > Define Item > General: Classifications

Field or Control	Description
Template ID	Select a value to use default values from a static item template that you define on the Static Item Templates page. Selecting a value causes all of the template values to be supplied as this item's values, but you can override any attributes.
Grade	The value in this field is the default on the Lot Control Information page when you create new lots. This field is informational only.

Field or Control	Description
Item Type	Select a value to define the functional group for this item. You can use this information as a search key for reports and inquiries. Establish item types on the Item Types page, which you access from the Define Controls menu.
Potency Code and UPC Code (universal product code)	These fields are informational only.
Stock Type	If the item is non-owned, select a value to identify the type of stock and the stock owner. The stock type is supplied to the business unit level and can be modified on the Define Business Unit Item - Inventory: Shipping/Handling page.
Commodity Code	Select a value to use on bills of lading to group and identify products that are being shipped for freight rating and insurance purposes. Establish commodity codes, also known as freight classes, on the Commodity Code page under the Common Definitions menu.
EU Commodity Code	PeopleSoft Inventory uses this code for Intrastat Reporting purposes.

Related Links

"Understanding Intrastat Reporting" (PeopleSoft Global Options and Reports)

Define Item - General: Classifications 2 Page

Use the Define Item - General: Classifications 2 page (GS1_CLAS2_INV_DEF) to define healthcare item attributes.

Navigation:

Items > **Define Items and Attributes** > **Define Item** > **General: Classifications 2**

This example illustrates the fields and controls on the Define Item - General: Classifications 2 Page. You can find definitions for the fields and controls later on this page.

| General | Inventory | Substitutes | Configuration | Custom | Audit |

| Common | Classifications | Classification 2 | Dimensions | Usage |

SetID SHARE   Item ID 10007   Standard Unit of Measure EA
                                Sidepocket Shorts, Womens

GDSN Information Provider [   ]   FDA Listing Number [   ]
GDSN Information Provider GLN [   ]   FDA MarketingAuthorizationType [   ]
Target Country [   ]   FDA MarketingAuthorizationCode [   ]
Global Product Classification [   ]   FDA Product Code [   ]
Brand Name [   ]   GMDN Code [   ]
Alternate Item Number Type [   ]

☐ Expiration Date Controlled   ☐ Returnable Packaging   ☐ Packaged Sterile
☐ Manufacturing Date Controlled   ☐ Labeled Single Use   ☐ Sterilize Before Use
☐ Contains DEHP   Sterilization Method [   ]

Field or Control	Description
SetID	Enter an identification code that represents a set of control table information or TableSets.
Item ID	Enter an identification code for the associated item.
Standard Unit of Measure	Enter the most common and smallest valid unit of measure for the associated item.
GDSN Information Provider	Enter the name of the party who owns the data.
FDA Listing Number	Enter the 7 digit FDA listing number associated with the medical device.
GDSN Information Provider GLN	Enter the Global Location Number (GLN) of the information provider.
FDA Marketing Authorization Type	Enter the FDA Marketing Authorization Type.
Target Country	Enter the code that identifies the target market.
FDA Marketing Authorization Code	Enter the numeric code of the FDA authorizing labeler to market the associated device in the USA (for K & P).
Global Product Classification	Enter the global EAN.UCC classification category code; this is a unique 8 digit numerical key.

Field or Control	Description
FDA Product Code	Enter the alphanumeric FDA product code of the associated item.
Brand Name	Enter the brand name of the associated item.
GMDN Code	Enter the Global Medical Device Nomenclature preferred code used to identify the associated device at a global level.
Alternate Item Number Type	Enter the type of alternate item number provided like GTIN, HIBC etc.
Expiration Date Controlled	Select if the expiration date is controlled.
Returnable Packaging	Select if returnable packaging is required.
Packaged Sterile	Select if the associated item is packaged sterile.
Manufacturing Date Controlled	Select if the manufacturing date is controlled.
Labeled Single Use	Select if the associated item is labelled for single use.
Sterilize Before Use	Select if you must sterilize the associated item before use, when not packaged sterile.
Contains DEHP	Select to indicate if the item contains Di (2 – ethylhexyl) phthalate.
Sterilization Method	Enter the name of the sterilization method applicable before the associated item is used.

Define Item - General: Dimensions Page

Use the Define Item - General: Dimensions page (INV_ITEMS_DEFIN3) to define item dimensions such as weight, volume, size and color.

Navigation:

Items > **Review Item Information** > **Review Item SetID Attributes** > **General: Dimensions**

Items > **Define Items and Attributes** > **Define Item** > **General: Dimensions**

Field or Control	Description
Length, Height, Width, Dimension UOM	The system uses dimension information on the Alternate Plan page for putaway and capacity checking if you enable capacity checking by volume for the business unit and storage locations.
Weight, Weight UOM, Volume, Volume UOM	Indicate weight and volume values that the system uses when creating bills of lading, creating delivery IDs in delivery management, and load planning. The system uses these values if shipping and packing weights and volumes are not defined on the Define Business Unit Item - Inventory: Weight/Volume page. The system also uses weight and volume for capacity checking when you enable capacity checking for the business unit and storage locations. Base the weight and volume that you enter on the item's standard UOM. **Note:** When you change the weight and volume, recalculate capacity for the storage locations where you track capacity. For each item storage location, select the Calc capacity at save time (calculate capacity at save time) option on the Volume/Weight Capacity Checking page.
Item Size and **Item Color**	These fields are informational only.

Related Links
"Volume/Weight Capacity Checking Page" (PeopleSoft Inventory)

Define Item - General: Usage Page

Use the Define Item - General: Usage page (INV_ITEMS_DEFIN8) to define material usage attributes for an item at the SetID level.

Navigation:

Items > **Review Item Information** > **Review Item SetID Attributes** > **General: Usage**

Items > **Define Items and Attributes** > **Define Item** > **General: Usage**

This example illustrates the fields and controls on the Define Item - General: Usage page. You can find definitions for the fields and controls later on this page.

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

Field or Control	Description
Usage Tracking	Select a method to track the item for billing or costing purposes.
	Note: The process for collecting this information and communicating it to the third-party billing system is the same for each value. The difference is in the methodology that the third-party system uses when billing the consumer.
	Values are:
	Billing: Tracks the usage of the item for billing. This method compiles consumer usage information to bill the consumer directly for items that are used.
	Costing: Tracks the usage of the item for cost accounting. This method compiles the consumer usage information to set the cost of a procedure accurately. After the cost is set, you can determine the charge for that procedure. Over time, monitor procedure costs to ensure that the procedure price remains competitive and covers actual costs.
Reconcile	Select to include the item in the material usage reconciliation of its par location. You can reconcile only items that are tracked for billing or costing. You must set up reconciled items that are replenished to their par location (the **Not Replenished** check box is deselected on the Define Par Location Groups page and Define Par Location - Line page) with a replenishment control selection of *Par* or *Min/Max* on the Define Par Location - Line page.

Field or Control	Description
Charge Markup % (charge markup percentage) and **Charge Markup Amt** (charge markup amount)	Enter the markup percentage and flat markup on the item. The system applies the markup to the cost of the item.
Charge Code	The charge code is for informational purposes only. Use this code to assist in consumer billing. Set up this internal code on the Charge Codes page.
Currency Code	Enter the currency code that represents the values in the **Service Price** and **Service Exchange Amount** fields.
Service Price and **Service Exchange Amount**	Enter the service part price and the part exchange price. These values are used with PeopleSoft Customer Relations Management.
Reusable, Disposable, Recyclable, Consumable, Returnable, or **Serviceable**	Select for reporting and inquiry purposes only.

Related Links

"Reconciling Material Usage with Receipts" (PeopleSoft Inventory)

Define Item - Inventory: Tracking/Description Page

Use the Define Item - Inventory: Tracking/Description page (INV_ITEMS_DEFIN2) to establish tracking item and lot-control attributes.

Navigation:

Items > **Review Item Information** > **Review Item SetID Attributes** > **Inventory**

Items > **Define Items and Attributes** > **Define Item** > **Inventory**

This example illustrates the fields and controls on the Define Item - Inventory: Tracking/Description page. You can find definitions for the fields and controls later on this page.

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

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

Field or Control	Description
Lot Control	Select to indicate that a quantity of inventory items is produced as a group or otherwise collected into an identifiable unit. Lots often represent production runs. For lot-controlled items, the lot ID is entered at the time of receipt and putaway and for inventory movement transactions. A default filler value for lot ID is entered on the Installation Options - Inventory page and is used by items that are not lot controlled.
Serial Control	Select to indicate that a unique identifier is assigned to each item that is in stock. The system manages serial-controlled inventory items in units of one, based on the standard UOM. For serial-controlled items, enter the serial ID at the time of receipt and putaway and for all inventory movement transactions. A default filler value for serial number is entered on the Installation Options - Inventory page and is used by items that are not serial controlled.
Shipping Serial Control	Select to indicate that serial tracking is required only at the time of shipment. You move ship-serial items through the warehouse without entering serial information into the system, which simplifies transaction processing and entry. You assign serial numbers when the item is shipped, which provides serial tracking on products that are shipped to customers, internal locations, and other inventory business units.

Field or Control	Description
Trace Usage	Select the *Serial* value to track the components of this assembly. If existing inventory transactions have occurred, you will receive a warning message that future genealogy tracking will be affected but the change will be allowed. This option is used for component items and enables you to associate the component's serial ID or lot ID with a higher-level assembly item whose **Serial in Production** option is equal to *Yes*. Values are: *Serial:* Select to enable this component's serial ID to be tracked in a higher level assembly whose **Serial in Production** option is selected. If the component's **Lot Control** option is selected, then both the serial ID and lot ID will be tracked. *Lot:* Select to enable this component's lot ID to be tracked in a higher level assembly whose serial in production option is *Yes*. *None:* Select if you do not want to track this item. Similar to serial in production, trace usage can be used in conjunction with the **Serial Control** option. If the **Serial Control** option is selected, then the serial ID will be identified in inventory, and this serial ID remains with the item throughout the entire manufacturing process. If **Serial Control** is deselected, then serial ID will not be identified in inventory, but a serial ID will be specified when the item is associated with a serial assembly. This allows tracking the genealogy without requiring the need to track the serial ID in inventory. **Important!** The source code for serial-controlled items must be Make or Buy. See "PeopleSoft Manufacturing" (PeopleSoft Manufacturing).
Staged Date Control	Select to indicate that the system tracks an item by the date that it is staged into inventory. This check box is available when you select the **Staged Date Control** check box on the Installation Options - Inventory page. If it is selected, it is used as a default for the SetID/item, but you can override it. If the item is not tracked by its staging date, the staged date fields do not appear on any of the item transaction pages. The stage date is used as the default for the business unit-item level, which is the level that the system uses to determine staged-dated tracking. For stage date-controlled items, you must enter the stage date at the time of receipt and putaway and for all inventory movement transactions.

Field or Control	Description
Serial in Production	Select this option if you want to track the key serial and lot components that make up this assembly item. You will assign a serial ID to the item during the manufacturing process. You will also identify serial and lot components that are used to produce this item.
	This field can be used with and without the serial control option. If you do select serial control, then you will enter the serial ID for all material movement transactions. If you do not select the serial control option, then the system tracks the serial ID during the production process. This means that you assign a serial ID to the item during production and associate serial and lot components with this serial assembly. During completions, you will complete the serial ID to inventory.
	Note: If you select serial in production and not serial control, during subsequent inventory movements of this item, you will not need to enter the serial ID.
Device Tracking	Select to provide PeopleSoft Purchasing with item visibility throughout the procurement cycle.
Shelf Life (Days)	Enter the number of days that the item can remain in inventory before it is no longer usable.
Availability Lead Time (Days) and Retest Lead Time (Days)	Enter values for lot-controlled items. The availability lead time is the number of days between the lot's creation date and the date that it becomes available; the retest lead time is the number of days between a lot's creation date and the date that it needs to be retested.
Lot Status	Select a default value to assign to newly created lots for lot-controlled items. You can update lot status at any time on the Lot Control Information page. Values are:
	Hold: Prevents material transactions for the item-lot combination temporarily.
	Open: Enables regular processing of the lot. You cannot change an *Open* lot status if quantity for the item-lot combination is allocated to a demand line.
	Rejected: Prevents material transactions for the item-lot combination.
	Restricted: Provides a warning message when you use the lot in an inventory transaction.
	Note: Because hold, rejected, and restricted lots are not available for picking plans or for lot allocations, their available quantity is *0.* You can, however, use restricted lots in picking transactions on the Picking Feedback page.

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

Related Links

"Understanding Lot Management" (PeopleSoft Inventory)

"Defining Serial Control and Shipping Serial Control" (PeopleSoft Inventory)

"Understanding Inventory Status" (PeopleSoft Inventory)

"Serial Genealogy" (PeopleSoft Manufacturing)

Define Item - Inventory: Shipping/Handling Page

Use the Define Item - Inventory: Shipping/Handling page (INV_ITEMS_DEFIN5) to establish item shipping and handling attributes.

Navigation:

Items > **Review Item Information** > **Review Item SetID Attributes** > **Inventory: Shipping/ Handling**

Items > **Define Items and Attributes** > **Define Item** > **Inventory: Shipping/Handling**

Field or Control	Description
Storage Rule	Select a rule that will appear on both the Putaway Plan and on the Review Plan.
MSDS ID (material safety data sheet ID)	Select the appropriate ID, for informational purposes, if the item requires one. Establish MSDS IDs on the MSDS Identifiers page.
Storage Temp, Storage Humidity	These fields are informational only.
Max Capacity (maximum capacity)	Enter the maximum capacity at which this inventory item can be stored in a designated material storage bin. Track maximum capacity when storage locations in an inventory business unit are assigned exclusively to particular inventory items. This field reflects the standard UOM and is informational only.
Packing Code	Select a value. Establish packing codes on the Packing Codes page, which you access from the Define Controls menu.

Field or Control	Description
Ship Via	Select a shipping code. Establish shipping codes on the Ship Via Codes page under the Common Definitions menu. The value that you select appears by default for the business unit; you can modify it on the Define Business Unit Item - Inventory: Shipping/Handling page. The ship via value for the item at the business unit level appears by default on the order line when you enter a request for this item by using the Create/Update Stock Request (EZ_ISSUE_INV_GBL) component. The default hierarchy for the ship via value depends on the type of order that you create. The hierarchy for an outbound sales order is: 1. Load ID (if assigned). 2. Inventory item ID. 3. Contract. 4. Ship to customer. 5. Order group. The hierarchy for an outbound material stock request is: 1. Load ID (if assigned). 2. Inventory item ID. 3. Customer. The hierarchy for an Interunit transfer is: 1. Transfer attributes by item. 2. Transfer attributes by business unit. The hierarchy for an inbound purchase order is: 1. Supplier. 2. Business unit options.
Tariff Cd (tariff code)	Select the harmonized tariff code for the item. Establish harmonized tariff codes on the Harmonized Tariff Code page under the Common Definitions menu. Various documents that accompany shipments across international borders require harmonized tariff codes. Customs officials use these codes to determine duty on shipped commodities. The system uses this information on export bills of lading for export sales orders that are defined in PeopleSoft Order Management or export intercompany transfers in PeopleSoft Inventory.

Define Item - Configuration Page

Use the Define Item - Configuration page (INV_ITEMS_DEFIN6) to define configuration attributes for an item.

Navigation:

Items > Review Item Information > Review Item SetID Attributes > Configuration

Items > Define Items and Attributes > Define Item > Configuration

This example illustrates the fields and controls on the Define Item - Configuration page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Distribution Configuration	Select to enable distribution configuration processing, which enables the system to capture dynamic option and pricing information.
Distribution Model	If you select **Distribution Configuration,** the system uses the model to select the configuration rules that are used to configure this item.
Production Configuration	Select to enable production configuration processing, which enables the system to: • Perform routing operations and component generation for manufacturing configured items. • Generate a production cost if the item's cost is determined by the configuration.

Field or Control	Description
Production Model	If you select Production Configuration, the system uses the model to select the configuration rules that are used to configure this item.
Configuration Code Generation	Select to indicate that the configuration template will be used to generate a configuration code. This option is valid only for lot controlled items that have distribution configuration.
Template	Select a template for configuration code generation. The system creates configuration codes based on the template that you select. You cannot change an item to use configuration codes if system activity exists for the item (such as inventory balances, customer orders, and so on).
Default Configured Lot	Select to indicate that the default value is the last lot with the same configuration code (during receipts and issues). This check box is available when you select **Configuration Code Generation.**
Configuration Costing	Select to generate costs for each unique configuration code during production order creation. Also, you can recalculate the cost of a configured item to reflect cost changes in standard items. This check box is available when you select **Configuration Code Generation.**

Approving Item Definitions

This section discusses how to approve item definitions.

Page Used to Approve Item Definitions

Page Name	Definition Name	Usage
Item Approval Page	INV_ITEM_APPROVAL	Approve item definitions that you create at the SetID level.

Understanding how to Approve Item Definitions

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

To set up and use manual item approval processing:

1. Select the **Item Approval Required** option on the Installation Options - Overall/GL page.

2. Specify an item approval method:

    • Manual: Authorized staff can approve or deny item definitions for a SetID on the Item Approval page.

    • Workflow: You must establish item approval as a business process in PeopleSoft Workflow.

3. Change the current status of the item from *Under Initialization to Pending Approval* on the Define Item - General: Common page when you add item definitions at the SetID level.

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

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

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

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

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

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

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

The Effects of Status Change on the Item

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

• If the item has a status of *Under Initialization* at the SetID level, the definition for the item at the business unit level can have only the status of *Under Initialization.*

• If the status of the item at the SetID level changes from *Under Initialization* to *Pending Approval,* all of the definitions for the item at the business unit level are updated to *Pending Approval* status.

• If the status of the item at the SetID level changes from *Pending Approval* to *Active,* all the definitions for the item at the business unit level are updated to *Active* status.

• If you change the status of the item at the SetID level back to *Under Initialization,* then all the definitions for the item at the business unit level are updated to *Under Initialization.*

Related Links

Managing Inventory by Item Status

Item Approval Page

Use the Item Approval page (INV_ITEM_APPROVAL) to approve item definitions that you create at the SetID level.

Navigation:

Items > **Define Items and Attributes** > **Approve Item** > **Item Approval**

To approve items, use the Item Approval (ITEM_APPROVAL) component.

Field or Control	Description
Item Definition Approved	Select a value: *Approved:* Approves the item when you save the page. This is the status default value. *Denied:* Denies the item so that it is not available for transactions, but you can view it by using the Review Item Information menu. **Note:** For items with a status of *Denied* or *Pending Approval,* you can change the status back to *Under Init*(under initialization). When you do, the status of the item definition at the SetID and business unit levels changes back to *Under Initialization.*

Associating an Item with a UOM

This topic discusses how to associate an item with a UOM

Use the UOM Weight/Volume page (INV_ITEM_WTVOL) to assign default packing codes and stocking and shipping physical measurements to an item-UOM combination.

Navigation:

Click the **UOM Weight/Volume** link on the Units of Measure page.

Pages Used to Associate an Item with a UOM

Page Name	Definition Name	Usage
Units of Measure Page	INV_ITEM_UOM	Assign a UOM to an item. For each item-UOM combination that you define, specify quantity precision and rounding rules for use in system calculation.

Page Name	Definition Name	Usage
UOM Weight/Volume Page	INV_ITEM_WTVOL	Assign default packing codes and stocking and shipping physical measurements to an item-UOM combination. Units of Measure Page
Global Trade Item Numbers Page	ITM_MFG_GTIN_SP	Assign a GTIN to an item and UOM combination using a locally owned EAN/UCC Company Prefix (manufacturer).

Understanding how to Associate an Item with a UOM

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

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

Related Links
Using Item Quantity UOM

Units of Measure Page

Use the Units of Measure page (INV_ITEM_UOM) to assign a UOM to an item.

For each item-UOM combination that you define, specify quantity precision and rounding rules for use in system calculation.

Navigation:

Items > **Define Items and Attributes** > **Define Item UOM**

To define the available units of measure for an item, use the Units of Measure (INV_ITEM_UOM) component. Use the Units of Measure (INV_ITEM_UOM_CI) component interface to load data into the tables for this component.

This example illustrates the fields and controls on the Units of Measure page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Conversion Rate	Enter conversion rates that conform to the quantity precision rule for an item-UOM combination. For example, if an item's standard UOM is defined as a whole number, you cannot enter a conversion rate that contains a decimal value.
Quantity Precision	The rule that is to be used for this item-UOM combination. **Note:** Because serial-controlled items are by definition whole numbers, they can have only whole number quantity precision.
Default Stocking UOM (default stocking unit of measure)	Select this check box to define one unit of measure as the default stocking UOM. The default stocking UOM is used as a default on the PO Receiving, Inspection, Express Putaway, Manual Staging, and RMA & InterUnit Receiving pages. If the item is a serial controlled item, the default stocking UOM is defined as the standard UOM from the Define Item - General: Common page (Items, Define Items and Attributes, Define Item, General) and you cannot change it. In PeopleSoft Inventory, the Default Stocking UOM can be used within the default hierarchy for: • The Create/Update Stock Request component if it is also defined as an ordering UOM type. • The Express Issue page if it is also defined as a shipping UOM type. • The Define Par Location - Line page and the Maintain Par Locations component if it is also defined as an ordering UOM type. For more information on the default hierarchies, see the individual component.

Field or Control	Description
Default Req UOM (default requisition unit of measure)	Select to indicate that the UOM should be displayed by default for requesters using PeopleSoft eProcurement. If not selected, the item supplier UOM (Items, Define Items and Attributes, Purchasing Attributes, Item supplier) or the standard UOM (Items, Define Items and Attributes, Define Item, General) is displayed by default for the requester. In PeopleSoft Inventory, the Default Req UOM can be used within the default hierarchy for: • The Create/Update Stock Request component if it is also defined as an ordering UOM type. • The Express Issue page if it is also defined as a shipping UOM type. • The Define Par Location - Line page and the Maintain Par Locations component if it is also defined as an ordering UOM type.
Unit of Measure Type	Indicate which transactions use the selected UOM. You must select at least one of these UOM types for each item: *Ordering:* The UOM is used for stock requests. The ordering UOM is also used by PeopleSoft Order Management. *Shipping:* The UOM is used for express issue and shipping/issues transactions. *Stocking:* The UOM is used for any putaway or receiving transaction. This UOM can also be used for numerous other transactions, including transfers, container management, adjustments, picking, and physical accounting.

Related Links
Using Item Quantity UOM
Establishing Quantity Precision and Rounding Rules for Items

Global Trade Item Numbers Page

Use the Global Trade Item Numbers page (ITM_MFG_GTIN_SP) to assign a GTIN to an item and UOM combination using a locally owned EAN/UCC Company Prefix (manufacturer).

Navigation:

Click the **Global Trade Item Number** link on the Units of Measure page.

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

1. Select the locally owned manufacturer code.

2. Enter the GTIN for the unit of measure.

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

3. Click the **OK** button.

The PeopleSoft application displays the Units of Measure page.

4. Save the changes.

Related Links

Using Universal Item Identifiers

Copying Items

This topic discusses how to copy item

Pages Used to Copy Items

Page Name	Definition Name	Usage
Copy Item Page	ITEM_COPY_INV	Copy item information within the same SetID, copy item attributes within the same business unit, and copy item attributes between business units.
Copy SetID to BU Item Status Page	INV_ITM_STATUS_SP	Copy the item status that you modify for the SetID to any of the business units where the item is defined.
Copy SetID to BU Substitute Items Page	INV_SETID_BU_SP	Copy the substitution definition of an item at the SetID level to the business unit level.

Understanding How to Copy Items

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

Copy Item Page

Use the Copy Item page (ITEM_COPY_INV) to copy item information within the same SetID, copy item attributes within the same business unit, and copy item attributes between business units.

Navigation:

Items > Define Items and Attributes > Copy Item

This example illustrates the fields and controls on the Copy Item page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Copy Item Within SetID	If you select this option, you can also copy the purchasing and inventory business unit attributes that are established for the item by selecting the **Copy Business Unit Attributes** option.
Copy Business Unit Attributes	The **Inventory Business Units** and the **Purchasing Business Units** group boxes at the bottom of the page display the business units that have established the item ID. By default, all business units are selected. Clear those business units with attributes that you do not want to copy to the target item. When you are copying from inventory business units, planning attributes at the business unit level are copied along with weight and volume attributes and configuration attributes. Values that are calculated through the replenishment process are not copied. However, other replenishment attributes (set up attributes, for example) are copied.

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

Note: If you copy items between business units with different currencies, you must change all cost and price fields for the item manually. |
| **Source Item ID** | If the item that is being copied still has a status of *Under Initialization,* then the target item is also placed in *Under Initialization* status. If the item that is being copied has a status of *Approved, Hold, Discontinue,* or *Inactive,* and item approval is not required, then the item is placed in *Active* status. If item approval is required, the item is placed in *Under Initialization* status. |

Related Links
"Setting Up Vendor Managed Inventory" (PeopleSoft Inventory)

Copy SetID to BU Item Status Page

Use the Copy SetID to BU Item Status page (INV_ITM_STATUS_SP) to copy the item status that you modify for the SetID to any of the business units where the item is defined.

Navigation:

Click the **Copy Item Status** link on the Define Item - General: Common page.

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

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

Substituting Items

This topic discusses how to substitute items:

Pages Used to Substitute Items

Page Name	Definition Name	Usage
Define Item - Substitutes Page	INV_ITEMS_DEFIN7	Establish a substitution definition for an item. An item substitution definition specifies alternate items that may be used in PeopleSoft Inventory, Purchasing, or Manufacturing when sufficient quantity of the requested item is unavailable.
Copy SetID to BU Substitute Items Page	INV_SETID_BU_SP	Copy an item's substitution definition at the SetID level to the business unit level.
Business Unit Substitute Items Page	INV_SUB_ATTRIB_SEC	View the business unit's current substitution definition for an item before copying the item's substitution definition from the SetID. Copy SetID to BU Substitute Items Page
Define Item - Substitutes Page	SUBS_ATTRIB_INV	Modify the substitution definition that is established for the item at the SetID level to meet the requirements of the business unit.
Copy SetID to BU Substitute Items Page	INV_SUB_ITEM_SEC	View and copy (if available) the substitution definition for the item at the SetID level.

Understanding how to Substitute Items

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

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

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

Define Item - Substitutes Page

Use the Define Item - Substitutes page (INV_ITEMS_DEFIN7) to establish a substitution definition at the Item SetID Level for an item through the Usage option.

An item substitution definition specifies alternate items that may be used in PeopleSoft Inventory, Order Management, Purchasing, or Manufacturing when sufficient quantity of the requested item is unavailable.

Navigation:

Items > **Review Item Information** > **Review Item SetID Attributes** > **Substitutes**

Items > **Define Items and Attributes** > **Define Item** > **Substitutes**

This example illustrates the fields and controls on the Define Items - Substitute page. You can find definitions for the fields and controls later on this page.

Substitute Item

Field or Control	Description
Priority	The substitute item with the highest priority (the lowest number) is substituted first. Priority doesn't need to be sequential, though it must be greater than zero. PeopleSoft applications display, print, and suggest substitute options in priority order.
Start Date, and End Date	Determines the date range for substitution validity. The current date appears by default as the start date, and December 31, 2099 appears as the default end date. You can change both dates.
Conversion Rate	Indicates the quantity of the substitute item that is required to replace the original item. The default value is *1*, but you can modify the value as necessary. Conversion rates are calculated by using the standard UOM.
Copy to Business Unit	After you finish defining substitution options for the item, click this link to access the Copy SetID to BU Substitute Items page, where you can copy the SetID's substitution definition to selected business units.

Usage

This example illustrates the fields and controls on the Define Item — Usage Page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Use for Shipments	Indicates whether the substitute item is valid for material stock requests and sales orders during the picking process.

Field or Control	Description
Use for Manufacturing	Indicates whether the substitute item can be used for substitutions on BOMs or production picking plans.
Use for Procurement	Defines whether the substitute item will be available for use in Procurement at the item SetID level to perform Automatic Item Substitution and/or Manual Item Substitution. You must also define the Purchasing Attributes for an item ID for the item to be used in the Purchasing, eProcurement system. Choose from these values:. • Automatic Substitution: This Substitute Item will be eligible for use in Procurement when performing Automatic Item Substitution • Do Not Use: This Substitute Item will not be eligible for use in the Procurement applications. This is the default value. • Manual Substitution: This Substitute Item will be eligible for use in Procurement when performing Manual Item Substitution. • Manual and Automatic: This Substitute Item will be eligible for use in Procurement when performing Manual and Automatic Item Substitution **Note:** PeopleSoft Purchasing uses the substitution definition from only the SetID level.

Related Links

"Item Substitution" (PeopleSoft Manufacturing)
"Selecting Suppliers Based on Item Ship To and Item Supplier Locations" (PeopleSoft Purchasing)
"Defining Purchasing Item Attributes" (PeopleSoft Purchasing)
"Purchasing Attributes Page" (PeopleSoft Purchasing)
"Item Supplier Location Substitute Items Page" (PeopleSoft Purchasing)

Copy SetID to BU Substitute Items Page

Use the Copy SetID to BU Substitute Items page (INV_SETID_BU_SP) to copy an item's substitution definition at the SetID level to the business unit level.

Navigation:

Click the **Copy to Business Unit** link on the Define Item - Substitutes page.

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

Chapter 5

Defining Items by Business Unit

Defining Items at the Business Unit Level

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

This topic discusses how to define items for the business unit:

Pages Used to Define Items for the Business Unit

Page Name	Definition Name	Usage
Define Business Unit Item - General: Common Page	GEN_ATTRIB_INV	Define basic business unit item attributes such as the item's cost element and current purchase cost, at the business unit level.
Define Business Unit Item - General: Costing Page	CM_ITEM_METHOD	Define item cost profiles of an item that is being added to a business unit in each of the books that the business unit uses.
Define Business Unit Item - General: Usage Page	MATRL_USG_ATTRIB	Define item usage attributes for an item at the business unit level.
Define Business Unit Item - General: Export Information Page	GEN_ATTRIB_EXP	Define item export information by specifying values that are used in export documentation that is generated for the business unit.
VMI Item Ship To Customers Page	IN_VMI_BU_ITEMS	Define customer ship to attributes for VMI items by selecting the ship to customers that are supplier managed by your organization for this item.
Define Business Unit Item - Inventory: Shipping/Handling Page	OVRD_ATTRIB_INV	Define item attributes for shipping and handling for the business unit.
Item Zone Assignments Page	ZONE_ATTRIB_INV	Associate an item with putaway and picking zones in the business unit. Zone assignment is optional; however, it enables much tighter control over the putaway and picking operations.

Page Name	Definition Name	Usage
Define Business Unit Item - Inventory: Replenishment Page	REPLEN_ATTRIB_INV	Define item replenishment attributes for use in the automated replenishment routines of a particular business unit.
Define Business Unit Item - Inventory: Weight/Volume Page	WTVOL_ATTRIB_INV	Define item information for weight and volume at the business unit level.
Define Business Unit Item - Inventory: Utilization Types Page	COUNT_ATTRIB_INV	Define item types and groups for an item at the business unit level.
Define Business Unit Item - Manufacturing: General Page	MFG_ATTRIB	Define manufacturing information for an item by determining default production and bill of material (BOM) information if the installation includes PeopleSoft Manufacturing.
Define Business Unit Item - Manufacturing: WIP Replenishment Page	MFG_ATTRIB2	Set up item replenishment defaults, if you use PeopleSoft Manufacturing. This is required for PeopleSoft Flow Production. Also, set up default values if you use replenishment as the component issue method and you don't use PeopleSoft Flow Production.
Define Business Unit Item - Planning: General Page	PL_ATTRIB_INV	Specify Planning information for an item.
Define Business Unit Item - Planning: Fences Page	PL_ATTRIB_INV2	Define how to generate item supply by determining the planning time, planning message parameters, safety stock and excess stock parameters, and other general information regarding how you generate supply for inventory items.
Define Business Unit Item - Planning: Forecast Page	PL_ATTRIB_INV3	Define forecast parameters by determining the parameters to control forecast consumption and incremental material supply and consumption.

Page Name	Definition Name	Usage
Define Business Unit Item - Planning: Order Modifiers Page	PL_ATTRIB_INV4	Define order modifiers for planning by determining planned transfer, purchase, and order quantity default values for a manufactured item. PeopleSoft Supply Planning use these values when creating planning models. When planning transfers between business units, purchases from suppliers, or the production of items using PeopleSoft Manufacturing, consider defining modifiers to set up guidelines when creating planned supply in PeopleSoft Supply Planning.
Define Business Unit Item - Configuration Page	CONFIG_ATTR_PNL	Define business unit attributes for configured items if you use PeopleSoft Product Configurator.
Define Business Unit Item - Custom1: Character Page	ITEM_ATTR_CHAR_PNL	Define alphanumeric field values at the business unit level for item attributes that are unique to the enterprise. Values that you define for the SetID on the Define Item - Custom1: Character page appear by default on this page, but you can modify them for the business unit.
Define Business Unit Item - Custom1: Numeric Page	ITEM_ATTR_NUMB_PNL	Define numeric field values at the business unit level for item attributes that are unique to the enterprise. Values that you define for the SetID on the Define Item - Custom1: Numeric page appear by default on this page, but you can modify them for the business unit.
Define Business Unit Item - Custom2: Character Page	ITEM_ATTR_CHR2_PNL	Define additional alphanumeric field values at the business unit level for item attributes that are unique to the enterprise.
Define Business Unit Item - Custom2: Numeric Page	ITEM_ATTR_NUM2_PNL	Define additional numeric field values at the business unit level for item attributes that are unique to the enterprise.
Business Unit Item Links Page	INV_BU_ITEM_LINKS	Access all the pages that are related to the business process of defining an item for a business unit.

Understanding how to Define Items by Business Unit

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

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

Keyword Search

Use the Business Unit Item Definition - Keyword Search page to perform keyword searches for items. Keyword search allows you to execute a deeper, more free-form search, to access application data from the Business Unit Item component.

For additional information on keyword searches, see the product documentation for *PeopleTools: Search Technology*, Working with Keyword Search modes.

Related Links
"Understanding Keyword Search within Components " (Application Fundamentals)

Define Business Unit Item - General: Common Page

Use the Define Business Unit Item - General: Common page (GEN_ATTRIB_INV) to define basic business unit item attributes such as the item's cost element and current purchase cost, at the business unit level.

Navigation:

Items > **Define Items and Attributes** > **Define Business Unit Item** > **General**

This example illustrates the fields and controls on the Define Business Unit Item - General: Common page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Current Status Date, Current Status, Future Status Date, and **Future Status**	See Define Item - General: Common Page.
Cost Element	Select the default material cost element for all receipts. The system requires this value for average-costed, actual-costed, and standard-costed items. You define cost elements on the Cost Elements page.
Inventory Item	Appears by default from item definition at the SetID level and cannot be overridden.
Standard Cost Group	Select a cost group code to select a set of items to roll up or update. You can also compare cost versions and report inventory value by cost group code. Establish cost group codes on the Cost Groups page, which you access from the Set Up Financials/Supply Chain - Product Related - Cost Accounting - Standard Cost Groups menu item.
Current Purchase Cost	Enter a value for the system to use to determine the material cost of purchased items and the lower-level material cost of a manufactured item when the cost type that you are rolling uses current costs. This value is per the standard UOM. This value is stored in the **CURRENT_COST** field of the BU_ITEMS_INV record. In addition, this value can be updated by the Update Default Actual Cost process.
Avg Matl Cost (average material cost)	This average material cost is automatically updated when a purchase receipt is put away. The current value is stored in the **AVERAGE_COST_MAT** field of the BU_ITEMS_INV record. This cost reflects the supplier's price of the item. This average cost calculation includes only the material portion of the purchase order cost; it does not include landed costs, voucher updates, or cost adjustments.

Field or Control	Description
Default Actual Cost	Enter a value for actual-costed items that can be used by various processes and reports if the item does not yet have an actual cost generated from the receipt and putaway processes. This value is stored in the **DFLT_ACTUAL_COST** field of the BU_ITEMS_INV record. In addition, this value can be updated by the Update Default Actual Cost process. The value in this field is used in these processes and reports: • INPOPOST (Stock Quantity Update process). This field value is used if the item is included in an inventory count prior to an actual cost being generated from receipt of the item. • RUN_IN_FULFILL_DPL (Deplete On Hand Quantity process). This field value is used to determine the transfer cost of an interunit transfer when the Transfer Pricing Definition component uses the default actual cost option. • INS5050 (Reconciliation Report). • INS5200 (Slow Moving Inventory). • INS9080 (Forecasting Download). • INPBPROC (Confirmations). • INPOPROC, INPOTEST (Stock Qty Update). • INPQEOQC (Replenishment Parameters). • INPVVALD (Inventory Adjustments). **Note:** You must enter a default actual cost if an average-costed book is defined for the business unit.
Average Purchase Price	The system updates this value when items are received and put away into an owned storage location, when the item is consigned, or when cost adjustments are applied using the Adjust Average Cost page. The only items that do not have this field updated are noncosted items or items for which all of the books are defined as standard costed. The average purchase price includes both the material and the landed costs of the item plus any cost adjustments. This value is stored in the **AVERAGE_COST** field of the BU_ITEMS_INV record.
Last Price Paid	The system updates this value when stock is put away from purchase receipts. It includes only the material cost of the received item.

Field or Control	Description
Non-Owned Item	When you are adding an item to a VMI business unit, the item must be an inventory item, and it must be owned and non-consigned. See Define Item - General: Common Page. See "Understanding Vendor Managed Inventory" (PeopleSoft Inventory).
Consigned Purchase	If the item is non-owned, indicate whether it is also consigned in this business unit. Although consigned items are physically stocked in the business unit, they are owned by the suppliers and are therefore not counted as part of the business unit's total stock owned. They are, however, eligible for all inventory transactions. **Note:** The item's designation as non-owned or consigned appears by default from the Define Item - General: Common page, but you can override it. All transactions within PeopleSoft Inventory use the designation for the business unit rather than the designation that is assigned at the SetID level.
Supplier ID, Supplier Location	If the item is consigned, you must indicate which supplier supplies the item by entering values. The item can be supplied to this business unit as a consigned item only by the supplier that you assign here. (Other suppliers can supply the item as owned.) PeopleSoft Payables extracts this information for the creation of an invoice when the item is consumed. **Note:** Consignment suppliers must be established on the Procurement Options page (available from the Supplier Information - Location page, which you access from the Supplier Setup/Maintenance menu) before they are available for selection here.

Related Links

"Setting Up the Cost Structure" (PeopleSoft Cost Management)

"Understanding Receiving and Putaway Processing" (PeopleSoft Inventory)

"Understanding Consigned Purchases in Inventory Management" (PeopleSoft Inventory)

Define Business Unit Item - General: Costing Page

Use the Define Business Unit Item - General: Costing page (CM_ITEM_METHOD) to define item cost profiles of an item that is being added to a business unit in each of the books that the business unit uses.

Navigation:

Items > **Define Items and Attributes** > **Define Business Unit Item** > **General**

Select the **Costing** link.

This example illustrates the fields and controls on the Define Business Unit Item - General: Costing page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Used in Mfg (used in manufacturing)	Select if the item is used in PeopleSoft Manufacturing.

Field or Control	Description
Profile	Scroll through all the books for this business unit to view or set the cost profile for the item in each of those books. The profile for each book appears by default from the cost profile group that you define on the Define Item - General: Common page. The item must have a cost profile for each book. If no cost profile group is associated with the item, or if a book is not associated with this cost profile group, the field is blank. Otherwise, an error message appears. You can change the profile for an item in a book if the book is not seeded for that item and if you select the **Allow Overrides to Profile** check box on the Group - Books page. **Note:** You cannot use this page to add or delete groups. To add, cancel, or delete books from a business unit, use the Define Inventory - Business Unit Books page. *Warning!* Transactions involving a non-cost item (that is, items with a cost profile defined as non-cost) are not placed in the costing records by the Transaction Costing process. For example, putaway transactions are not moved to the CM _RECEIPTS record. Use caution if you later decide to use this page to change an item's cost profile from non-cost item to an actual, standard, or average cost profile. After transactions have been generated in the system, changing a non-cost item can result in discrepancies between the costing and inventory records. A warning message displays on this page if you change the non-cost cost profile for an item with an on hand balance. If you decide to change a non-cost item please make sure you have no on hand quantity in the inventory business unit by running the Inventory Balance report (INS9090) and the Cost Management On hand Balance Validation report (CMS9010). Any inventory balance created while the business unit item used a non-cost profile will no longer be available when changing to another cost profile.

Related Links

"Setting Up the Cost Structure" (PeopleSoft Cost Management)

Define Business Unit Item - General: Usage Page

Use the Define Business Unit Item - General: Usage page (MATRL_USG_ATTRIB) to define item usage attributes for an item at the business unit level.

Navigation:

Items > **Define Items and Attributes** > **Define Business Unit Item** > **General**

Select the **Usage** link.

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

Field or Control	Description
Usage Tracking	Select wether the item will be tracked for *Billing* or *Costing* purposes.
Reconcile	Select to indicate that this item should go through the reconciliation process. This option is available after you select *Billing* or *Costing* in the **Usage Tracking** field.

Related Links

"Understanding the Material Usage and Reconciliation Business Process" (PeopleSoft Inventory)

Define Business Unit Item - General: Export Information Page

Use the Define Business Unit Item - General: Export Information page (GEN_ATTRIB_EXP) to define item export information by specifying values that are used in export documentation that is generated for the business unit.

Navigation:

Items > **Define Items and Attributes** > **Define Business Unit Item** > **General**

Select the **Export Information** link.

Field or Control	Description
Export License Nbr (export license number)	The value is used in situations where the products that are shipped from the business unit are under a general classification of export license commonly known as the general destination license. This is the default export license that the system uses for products that do not specifically require export commodity control.
ECCN (export commodity control number)	Enter a value if the export control business needs require it.
Origin Country	Enter the country in which the item was originally manufactured. The system uses this value for Intrastat reporting purposes. The country is generally required for the Intrastat Arrivals Report; however, the PeopleSoft Intrastat Transaction Loader also provides the value in this field for arrival and dispatch transactions. You can enter a specific country code for the item. If you leave the field blank, the transaction loader uses the country code for the business unit that shipped the item as the default origin country for PeopleSoft Order Management and interunit shipment transactions.
Region of Origin	See "Purchasing Attributes -Item Supplier (ITM_VENDOR)Page" (PeopleSoft Purchasing).

VMI Item Ship To Customers Page

Use the VMI Item Ship To Customers page (IN_VMI_BU_ITEMS) to define customer ship to attributes for VMI items by selecting the ship to customers that are supplier managed by your organization for this item.

Navigation:

Items > **Define Items and Attributes** > **Define Business Unit Item** > **General**

Select the **VMI Item Ship To Customers** link.

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

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

Related Links

"Understanding Vendor Managed Inventory" (PeopleSoft Inventory)

Define Business Unit Item - Inventory: Shipping/Handling Page

Use the Define Business Unit Item - Inventory: Shipping/Handling page (OVRD_ATTRIB_INV) to define item attributes for shipping and handling for the business unit.

Navigation:

Items > **Define Items and Attributes** > **Define Business Unit Item** > **Inventory**

This example illustrates the fields and controls on the Define Business Unit Item - Inventory: Shipping/Handling page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Ship Via	For material stock requests, if the system does not find a ship via value for the item at the business unit level, then the system uses the ship via value that you define at the SetID level. Establish ship via codes on the Ship Via Codes page, which you access from the Common Definitions menu.
Standard Pack Unit of Measure	The Shipping Carton Label (INS6025) process uses this value to determine how many labels to print. The UOMs must first be established on the Units of Measure page, which you access from the Common Definitions menu, before they are available for selection.
Stock Type	If the item is non-owned, you must select a value to identify the type of stock. Establish stock types on the Stock Types page, which you access from the Define Controls menu.
InterUnit Par Qty (interunit par quantity)	Enter the minimum amount of stock that must be on hand in the business unit before the system fulfills interunit transfer requests. For example, suppose an interunit transfer request is made for 100 units of an item that has an interunit par quantity of 50. If the balance on hand in the business unit is 75 units, then only 25 units are available to transfer. PeopleSoft Inventory uses the interunit par quantity when entering material stock requests for interunit transfers and during reservation processing.

Field or Control	Description
UOM Conversion Flag	Select a value for processing transactions using a bar code-enabled system or the Fulfillment Engine feature in PeopleSoft Inventory. Values are:

Convert to Default Stock UOM: Converts the UOM on incoming transactions to the default stocking UOM.

Convert to Standard UOM: Converts the UOM on incoming transactions to the item's standard UOM. This value enables you to stock all the inventory in the standard UOM and perform material movement transactions by using any valid UOM for the item.

Use Entered UOM: Processes transactions with the UOM that the user enters. |
Shelf Life (Days)	Enter the number of days that the item can remain in inventory before it is no longer usable. For lot-controlled items, PeopleSoft Inventory uses this value, along with the lot's creation date, to calculate the lot expiration date.
Staged Date Control	This field appears by default from the Define Item - Inventory: Tracking/Description page.
Isolate Item	Select to restrict the item's putaway or transfer transactions to empty storage locations or to locations containing stock with the same item ID. The option is not valid if the item exists in mixed-item storage locations. After stock that is marked for isolation is transferred to an empty storage location, you cannot transfer or put away stock with any other item ID until the quantity in the location is fully depleted.
Additional Handling, Oversized Item	PeopleSoft applications pass these values to the third-party system when calculating freight charges. You can also view this information on the Ship Container Details page.
Availability Lead Time (Days) and **Retest Lead Time (Days)**	If the item is lot-controlled, the availability lead time specifies the number of days between the lot's creation date and the date that it becomes available; the retest lead time specifies the number of days between a lot's creation date and the date that it needs to be retested. The Complete Putaway (INPPPTWY) process uses these lead times to calculate the lot's availability and retest dates.

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

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

Related Links

"Purging Page" (PeopleSoft Supply Chain Management Integration)

Using Units of Measure

"Defining Staged-Date Tracking" (PeopleSoft Inventory)

Item Zone Assignments Page

Use the Item Zone Assignments page (ZONE_ATTRIB_INV) to associate an item with putaway and picking zones in the business unit.

Zone assignment is optional; however, it enables much tighter control over the putaway and picking operations.

Navigation:

Click the **Assign Item to Zones** link on the Define Business Unit Item - Inventory: Shipping/Handling page

Field or Control	Description
Priority	PeopleSoft Inventory uses zone priority levels to determine which storage locations to use when putting away or picking the item. For example, suppose that you assign an item to two putaway zones, specifying that the first priority zone is fast-moving goods and the second priority zone is bulk storage. During putaway, the system first tries to place the item into the fast moving goods zone; if not enough space is available in fast-moving goods, the system moves on to bulk storage. If you assign these same zones as picking zones, the picking plan directs pickers first to locations in the fast-moving goods zone, then to locations in the bulk storage zone.
Zone Code	The options include all zones that are defined for the business unit that are also identified as putaway or picking zones for at least one storage location. <hr> **Note:** Zone codes (defined on the Storage Zone Codes page, which you access from the Inventory menu) and storage location zone assignments (defined on the Zone Assignments page, which you access from the Maintain Storage Locations menu) must be established before they are available for selection.

Related Links

"Establishing Putaway and Picking Zones" (PeopleSoft Inventory)

"Setting Up Putaway Defaults and Rules" (PeopleSoft Inventory)

"Picking Zones" (PeopleSoft Inventory)

Define Business Unit Item - Inventory: Replenishment Page

Use the Define Business Unit Item - Inventory: Replenishment page (REPLEN_ATTRIB_INV) to define item replenishment attributes for use in the automated replenishment routines of a particular business unit.

Navigation:

Items > Define Items and Attributes > Define Business Unit Item > Inventory: Replenishment

Inventory > Replenish Inventory > Setup Item Replenishment

This example illustrates the fields and controls on the Define Business Unit Item - Inventory: Replenishment page. You can find definitions for the fields and controls later on this page.

General	Inventory	Substitutes	Manufacturing	Planning	Custom	Configuration

Shipping/Handling   Replenishment   Weight/Volume   Utilization Types

Unit US008   Item ID LT5000   Standard Unit of Measure EA
Standard Wheel Subassembly

Replenishment Options
☑ Not Included In Replenishment
☐ Include WIP Quantity

Replenishment Demand Options
☐ Include Demand
Offset Days Option [▼]
Offset (Days) [   ]

Reorder Quantity Option [Use Business Unit Default ▼]
Replenish Class [🔍]
Replenish Calc Period (Days) [365]   Replenish Lead (Days) [   ]
Reorder Point [   ]   Reorder Quantity [   ]
Maximum Quantity [   ]   Safety Stock [   ]
Last Annual Demand [   ]   Economic Order Quantity [   ]
Desired Stock-In Probability [95.0 🔍] %

[💾 Save]   [🔄 Return to Search]   [📧 Notify]   [➕ Add]   [📄 Update/Display]

General | Inventory | Substitutes | Manufacturing | Planning | Custom | Configuration

Field or Control	Description
Not Included In Replenishment	Select to exclude the item from being processed by the IN Replenishment Options process (IN_REPLEN_AE) and the Replenishment Parameters (INPQRPLP) process for the business unit. For example, select this check box if you use PeopleSoft Supply Planning to handle replenishment.

Field or Control	Description
Include WIP Quantity	Select to enable the Replenishment Options process to add the quantity in WIP storage locations to the quantity that is available when determining whether an item has reached its reorder point. **Note:** Items in WIP locations are not considered to be available, so you must select this check box if you want to include WIP quantities in the replenishment calculation.
Include Demand	Select to include all unreserved demand in the reorder point calculation. The time period for unreserved demand is determined by the entry in the **Offset Days Option** field.
Offset Days Option	Select *Offset Days* to specify that the system should use offset days in the reorder point calculation. Select *Replenish Lead Days* to specify that the system should use replenish lead days in the reorder point calculation. This option is not available if the **Include Demand** option is not selected.
Offset (Days)	Enter the number of days if the **Offset Days** option was selected. This option is not available if the **Offset Days** option is not selected.
Reorder Quantity Option	Select the option for reorder quantities: *Use Business Unit Default:* The system will use the **Reorder Point Order Quantity** option that is selected for the business unit. *EOQ* (economic order quantity): The system creates replenishment requests using the economic order quantity. *Min/Max:* The system calculates the order quantity that is required to meet the maximum stocking level. *Static Reorder Qty:* The system creates replenishment requests using the reorder quantity.
Replenish Class	Categorizes the items by usage profile. This information is required if the item is included in replenishment processing. Establish replenishment classes on the Replenishment Classes page, which you access from the Define Controls menu.
Replenish Calc Period (Days) (replenishment calculation period in days)	Enter the number of days to use in calculating the item's replenishment values.
Replenish Lead (Days) (replenishment lead time in days)	Enter the average number of days from placement of the purchase order to receipt of the stock. Enter this field manually or let PeopleSoft Inventory calculate it.

Field or Control	Description
Reorder Point	If the sum of an item's available quantity and its on-order quantity is less than or equal to this value for the item, then the Replenishment Options process generates a replenishment request for restocking purposes. Establish the reorder point levels or let PeopleSoft Inventory calculate a reorder point.
Reorder Quantity	Enter the static quantity that is ordered by automated replenishment events. Reorder quantities are subject to supplier minimum and maximum analysis during procurement. If PeopleSoft Inventory calculates a reorder quantity that is less than the reorder point, it resets the reorder quantity to be equal to the reorder point the next time that you save the page. Otherwise, the stock level never rises above the reorder point, and PeopleSoft Inventory is caught in a loop of reordering insufficient quantity.
Maximum Quantity	Enter the maximum stocking quantity for the item.
Safety Stock	Enter a buffer stocking level to guard against unanticipated surges (or spikes) in average daily demand. Establish the safety stock levels for the item or let PeopleSoft Inventory calculate a statistical value for safety stock.
Last Annual Demand	Enter a value for EOQ calculations. Enter the last annual demand manually or let PeopleSoft Inventory calculate it.
Economic Order Quantity	Enter a fixed-order quantity to determine the amount of an item to purchase or manufacture at one time. The EOQ should minimize the combined costs of acquiring and carrying inventory. You can use the EOQ as the automated replenishment's reorder quantity. Enter an EOQ value or let PeopleSoft Inventory calculate it.
Desired Stock-In Probability	Enter the percentage of the time that you want stock on hand for an item. PeopleSoft Inventory uses this value in safety stock calculations.

Related Links

"Understanding Inventory Replenishment Processing" (PeopleSoft Inventory)

Define Business Unit Item - Inventory: Weight/Volume Page

Use the Define Business Unit Item - Inventory: Weight/Volume page (WTVOL_ATTRIB_INV) to define item information for weight and volume at the business unit level.

Navigation:

Items > **Define Items and Attributes** > **Define Business Unit Item** > **Inventory: Weight/Volume**

Field or Control	Description
Packing Code	See <u>Define Item - Inventory: Shipping/Handling Page</u>.
Packaging Code	Establish packaging codes on the Item Packaging Codes Page, which you access from the Set Up Financials/Supply Chain - Product Related - Inventory menu, It can also be displayed in the Packing Session (PACK_EST_SHIP) component, which you access from the Fulfill Stock Orders - Shipping menu.
Container Type	Establish container types by using the Container Types (CNTR_TYPE_INV_1) component, which you access from the Maintain Containers menu.
Stocking Weight and **Stocking Volume**	Enter the measurements for the item, plus any external straps, containers, pallets, or packing material that you use to stock the item. Enter values based on the UOM. **Note:** If you change the stocking weight and volume, you must recalculate capacity for the storage locations where capacity is tracked. For each storage location where the item is stored, select the **Calc capacity at save time** option on the Volume/Weight Capacity Checking page.
Shipping Weight and **Shipping Volume**	Enter the stocking measurements, plus any packing material or container measurements that you need for shipment. Enter values based on the UOM. These values are used in the delivery management feature of PeopleSoft Inventory to calculate the weight and volume of an order schedule line and determine when a delivery ID has reached capacity.

Related Links

"Volume/Weight Capacity Checking Page" (PeopleSoft Inventory)

Define Business Unit Item - Inventory: Utilization Types Page

Use the Define Business Unit Item - Inventory: Utilization Types page (COUNT_ATTRIB_INV) to define item types and groups for an item at the business unit level.

Navigation:

Items > **Define Items and Attributes** > **Define Business Unit Item** > **Inventory: Utilization Types**

This example illustrates the fields and controls on the Define Business Unit Item - Inventory: Utilization Types page. You can find definitions for the fields and controls later on this page.

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

Related Links

<u>Utilization Types Page</u>

"Understanding Counts" (PeopleSoft Inventory)

"Calculating Utilization Type Classifications" (PeopleSoft Inventory)

Define Business Unit Item - Manufacturing: General Page

Use the Define Business Unit Item - Manufacturing: General page (MFG_ATTRIB) to define manufacturing information for an item by determining default production and bill of material (BOM) information if the installation includes PeopleSoft Manufacturing.

Navigation:

Items > Define Items and Attributes > Define Business Unit Item > Manufacturing

This example illustrates the fields and controls on the Define Business Unit Item - Manufacturing: General page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Production Area	PeopleSoft Product Configurator uses this as the default production area for configured items, and it also uses it to search for the item's production options. PeopleSoft Supply Planning uses the production area that is defined here when the system creates planned production orders and when the business unit and item aren't associated with a production area. **Note:** You must create a production area and associate the item with it before specifying the production area information by using this page.
Calc Comp Yield at Completion (calculate component yield at completion)	Select this option to calculate component yield automatically when recording a completion at an operation, a completion to stock, or an assembly scrap. If you do not select this option, the system doesn't calculate component yield at completions. If you want to calculate component yield manually, deselect the check box and enter component yield by editing components during the Completions process by using the Edit/Issue Components component.

Field or Control	Description
Source Code	Select a value: *Buy:* Items that you typically purchase. *Expense:* Non-inventory items for which you do not maintain quantity on hand. *Floor Stck* (floor stock): Items that you maintain in inventory, but don't expense until you issue them to production. These might represent low-cost items that issue in bulk to production and do not monitor for cost or quantity on hand. Both floor stock and expense items can be specified as components on a BOM but are not issued to production, considered in planning, or included in the assembly item's cost. You cannot create BOMs, routings, production IDs, or production schedules for floor stock or expense items. Floor stock items cannot be identified as serial in production or the trace usage cannot be set to serial or lot. *Make:* Assemblies or subassemblies that you manufacture in house, at a subcontractor, or both. For this source code, select the **Phantom Item** option to issue all components for this item, instead of issuing the item itself, within PeopleSoft Manufacturing. **Important!** The source code for serial in production or trace usage items must be Make or Buy. *Planning:* Non-inventory items that can represent a family or group of inventory items for which you do not maintain quantity on hand. Planning items can have a planning BOM or planning routing and can be components on a planning BOM. However, you cannot specify planning items on a production or engineering BOM or routing, or use them as a component in production. **Note:** Because you define expense and planning items as non-inventory items at the SetID level, many of the attributes are not applicable, and all fields except the **Business Unit, Item ID,** and **Source Code** are unavailable.
Phantom Item	Select this check box to use a phantom item with the *Make* source code. This enables you to issue all components for this item, instead of issuing the item itself.

Field or Control	Description
Average Order Qty (average order quantity)	The typical batch or lot size that is used to produce this item. PeopleSoft Managing Costs uses this value when calculating per unit setup, fixed-run, and post production conversion costs. The system determines each cost by dividing the cost of each process by the average order quantity (AOQ). Typically, it calculates these costs at the operation level, then adds the costs for each operation together to provide the total cost. When the production order quantity differs from the AOQ here, and when the per unit setup, fixed run, and post-production conversion costs differ as well, the system calculates a labor and machine and a material lot size variance. The Linear Programming solver in PeopleSoft Supply Planning uses the AOQ as a standard lot size.
Associated Primary BOM (associated primary bill of material)	If you use multiple outputs, a given co-product might be created in more than one way; in other words, an item is a co-product on more than one item's primary BOM. By assigning an associated primary BOM to a co-product, you tell the system which BOM to use in exploding the co-product to the next level.

The following diagram illustrates multiple outputs. In the first structure, A is the primary item, B is the co-product, and X, Y, and Z are the components. In the second structure, D is the primary, B and E are the co-products, and F and G are the components:

Example: Two processes with the same co-product
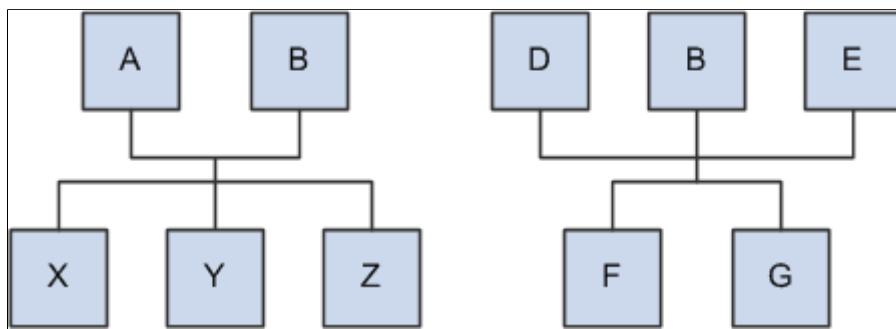
The above diagram shows that there can be two ways of making the same product. You need to decide which structure to use when exploding to lower levels. Therefore, you need to signify a primary structure (Associated Primary BOM) that is associated with each item that may exist as a co-product but not as a primary. To do this, you can assign B's associated primary BOM as either A or D. If B has its own BOM structure and you want to use that structure when exploding to lower levels, then you can leave B's associated primary BOM as B.

Component Issue Method

The Component Issue Method group box defines how to issue the item to the shop floor. If you define an item's component issue method as *Use Component's Method* for a production area on the Production Area/Item page, the system uses the component issue method that you define here. The options are:

Field or Control	Description
Issue	Enables you to generate a picking plan and use PUSH or PULL to issue material directly from PeopleSoft Inventory to the operation's work center. The operation's work center for the component is defined on the routing.
Kit	Enables you to issue components directly to a production ID. As in the production issue method, you use a picking plan to list the required items. The items are then assembled into batches for each order. The material is charged to the production order when it is issued.
Replenish	Enables you to stock components in the WIP locations that are associated with the work center in which you use the components. The item is typically stocked to a maximum stocking level. When the quantity on hand falls below the replenishment point, a notification is sent to the stockroom.

BOM Usage

The BOM Usage group box contains the following options:

Field or Control	Description
Revision Control	If you select this option, and BOMs exist for the assembly item, then the dates for the components that are specified in the BOMs must be aligned with the dates within the revisions. If you select this option, you can select **By Effectivity Date** or **By Revision** to define how you want to maintain a BOM for this item. A BOM for the item need not exist for you to make this choice. You can always deselect this option without deleting any revisions for the item.
By Effectivity Date	You can enter dates on which components are in effect for an assembly's product structure when maintaining BOMs by using the BOM Maintenance Summary and Component pages. The system validates these dates so that they align with item revision dates.

Field or Control	Description
Auto Revision	If you select **Revision Control,** you can select this option. Selecting it indicates that revisions for the item can be automatically generated by using a scheme that is defined at the business unit level. If revisions are already created manually with the Revision Maintenance component, then the system uses the revision scheme to select the next available revision. If you want the system to create item revisions automatically, you can use the mass maintenance process in either PeopleSoft Manufacturing (by using the BOM Mass Maintenance by Mass Maintenance Code component) or PeopleSoft Engineering (by using the BOM Mass Maintenance by Engineering Change Order component). The mass maintenance process creates revisions only for those items that have both **Revision Control** and **Auto Revision** selected.
By Revision	You can associate effective and obsolete revisions with components by using the BOM Maintenance and Component pages. Specify revision dates on the Rev Maintenance page.

If you change from not maintaining revision control to maintaining revision control, and if you create one or more BOMs for the item, then you must make sure that the effectivity dates on the BOMs align with the effectivity dates on the revisions.

If you do not select the **Revision Control** option, then the **BOM Usage** group box is unavailable for entry and By Effectivity Date appears by default for BOM usage.

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

Master Routing Option

Use the Master Routing Option group box to select the routing for this item. The options are:

Field or Control	Description
Item	Select to link an item directly to the routings of the item that you select in the **Reference Routing Item** field. The default is the item itself.
Item Group	Select to link the routings of a reference routing item to an item group. Before you use this option, define item group routings on the Group Rtg Assignment page.

Field or Control	Description
Item Family	Select to link the routings of a reference routing item to an item family. Before you use this option, define item group routings on the Family Rtg Assignment page.

Production Option Control

The Production Option Control group box determines whether the system uses BOM/routing defaults or uses production option maintenance. By using this page, you control how you define production options at the business unit and item level. This information is used by Supply Planning to extract data based on the option that you select from these two choices: BOM/Routing Defaults or Prdn Option Maintenance.

Field or Control	Description
Use BOM/Routing Defaults	Select this option if specific BOM/Routing combinations are not required. In addition, you can limit the number of BOM/routing combinations that are extracted to PeopleSoft Supply Planning by using the **BOM** and **Routing** fields in the **Production Option Control** group box. If you select this option, first create BOM and routing codes for an item, and then use the Production Option Maintenance component to link the BOM and routing codes together and (optionally) assign them to production areas. If you select this option, you cannot access the Production Option Maintenance component for the item, but you can still limit the production options that are created in PeopleSoft Supply Planning by selecting a BOM code, a routing code, or both.

Field or Control	Description
Use Prdn Option Maintenance	Select this option if you want to define specific BOM/routing combinations that can be extracted to PeopleSoft Supply Planning or used to create production IDs and production schedules. In addition, you can effective-date the BOM/routing combinations (for example, if you want to handle seasonal variations in the product mix). If you select this option: 1. Create BOM and routing codes for an item. 2. Use the Production Option Maintenance component to link the BOM and routing codes together and (optionally) assign them to production areas. 3. Select the **Include in Planning** check box to specify which BOM/routing combinations the Production DataLink sends to the Planning engine. 4. Finally, create production IDs and production schedules for the item.
BOM Code and **Routing Code**	Enter values to limit the number of BOM and routing combinations that the system extracts to PeopleSoft Supply Planning.
Valid Production Options only	If you select **Use Prdn Option Maintenance,** select this option only if you want to use predefined production options when creating production IDs. Do not select it if you want to be able to specify, in the Production ID Maintenance component, BOM/routing combinations that are not defined with the Production Option Maintenance component.

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

BOM Code and Routing Code Settings	Production Options Created
Both BOM code and routing code are blank.	The system creates a production option for every possible BOM/routing combination.

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

Backflush Lot Option

Use this group box to define the backflush lot selection rule for this item ID and business unit combination. The backflush lot selection rule enables you to determine which lot IDs are selected for consumption when a backflush is performed for a production ID or production schedule. The option selected on this page overrides the manufacturing business unit level setting on the MFG BU Prnd Options page.

The options for the backflush lot selection rule are:

Field or Control	Description
Default from BU	(Default) Select to use the backflush lot selection rule defined at the manufacturing business unit level on the MFG BU Prnd Options page.
Manual	Select this option to require the user to enter the specific lot IDs consumed during backflushing. The system does not automatically select any lot IDs.
Earliest Expiration Date	Select this option to have the system select the lot IDs for consumption based on the lot expiration date. The system first selects the lots with the earliest expiration date.
Earliest Available Date	Select this option to have the system select the lot IDs for consumption based on the lot available date. The system first selects the lots with the earliest available date.

Note: Before changing the backflush lot selection rule, it is recommended that you process all pending transactions in the staging tables (BCT tables) that impact production completion. Changing the backflush lot selection rule can impact how these BCT transactions are processed.

See "Automatically Consuming Lot-Controlled Stock During a Backflush" (PeopleSoft Manufacturing).

Production Lead Times

The fields in this group box are used by PeopleSoft Supply Planning . In PeopleSoft Supply Planning, these lead time fields are used when generating planned orders without routings.

Field or Control	Description
Fixed Lead Time	Enter a time period to use as the fixed lead time of an item when generating planned orders without routings.
Variable Lead Time	Enter a time period to use as the variable lead time of an item when generating planned orders without routings.
Use Lead Time	Select this check box to use the Fixed Lead Time field and the Variable Lead Time field in production planning. If you don't define any lead times, the PeopleSoft Supply Planning models both expect either an enterprise routing or a production routing, respectively, to exist in order to define the run rates when planning production.

Related Links

"Understanding Production Areas" (PeopleSoft Manufacturing)
"Understanding Component Lists" (PeopleSoft Manufacturing)
"Assigning Associated Primary BOMs" (PeopleSoft Manufacturing)
"Understanding Business Unit Structures" (PeopleSoft Manufacturing)
"Understanding Routings" (PeopleSoft Manufacturing)
"MFG BU Prdn Options Page" (PeopleSoft Manufacturing)

Define Business Unit Item - Manufacturing: WIP Replenishment Page

Use the Define Business Unit Item - Manufacturing: WIP Replenishment page (MFG_ATTRIB2) to set up item replenishment defaults, if you use PeopleSoft Manufacturing.

This is required for PeopleSoft Flow Production. Also, set up default values if you use replenishment as the component issue method and you don't use PeopleSoft Flow Production.

Navigation:

Items > **Define Items and Attributes** > **Define Business Unit Item** > **Manufacturing: WIP Replenishment**

This example illustrates the fields and controls on the Define Business Unit Item - Manufacturing: WIP Replenishment page. You can find definitions for the fields and controls later on this page.

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

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

Field or Control	Description
Repl Max Qty (replenishment maximum quantity), **WIP RPL Mode** (WIP replenishment mode), and **WIP RPL Type** (WIP replenishment type)	If you don't use PeopleSoft Flow Production, the WIP fields are unavailable for entry. In this case, the system uses defaults for a WIP replenishment mode of *Backflush Controlled* and a replenishment method of *Workflow.* If you use PeopleSoft Flow Production, enter a replenishment maximum quantity to set the maximum amount of the item that you want stored at any WIP location using the item. It includes the item's on-hand quantity and any open requests that are already made. The system issues a warning message if you perform a replenishment transaction that exceeds the replenishment maximum quantity. The replenishment maximum quantity is available for only those items that use the manual replenishment mode. PeopleSoft Flow Production uses the WIP RPL Mode to determine how to generate replenishment requests for this item. Options include: *Backflush Controlled:* You consume components from the WIP location while backflushing completions. When the quantity on hand falls below the replenishment point, the system automatically generates a replenishment request to bring the on-hand quantity back above the replenishment point. The replenishment request is a multiple of the issue multiple. For example, if the replenishment point is 60, the on-hand quantity is 30, and the issue multiple is 20, then the system generates a replenishment request for 40 to bring the on-hand WIP location quantity back above the replenishment point. *Kanban Card:* The replenishment process uses Kanban cards as a manual request for material. In this scenario, Kanban cards are either entered or imported into the system and then printed out. A Kanban card is attached to a box of components; as components are used on the production line, you place the Kanban cards in a Kanban holder. The Kanban cards are picked up periodically at the WIP location and taken to a Kanban sorting room or to the source location (such as inventory, feeder line, or supplier) on the card to get the components. *Manual:* You have a visual indicator that the WIP location needs replenishment, and you scan in the item ID and WIP location to generate a replenishment request for the specified issue multiple. This request includes the replenishment quantity and source location that is associated with that item and WIP location. This is largely used with electronic data collection.

Field or Control	Description
WIP RPL Source (WIP replenishment source)	Determines where you send the PeopleSoft Flow Production replenishment request and what source supplies the WIP location. Options include: *Feeder:* A feeder line creates subassemblies that it feeds into the main production line. When you use a certain quantity of the subassemblies, you send a replenishment signal to start production on the feeder line. If you select this option, select the WIP production area that serves as a feeder line for this item. *Inventory:* Replenish the WIP location directly from an inventory location. *Supplier:* Use Supplier replenishment to replenish the WIP location by directly receiving purchased components from a supplier. If you select this option, select the supplier ID and supplier location that directly replenish this item. You can override this prior to dispatch if necessary.
WIP RPL Method (WIP replenishment method)	Designate how the PeopleSoft Flow Production replenishment request is communicated. You must select *Backflush* or *Manual* as the WIP replenishment mode to use WIP replenishment methods. For supplier replenishment, a separate replenishment method is available and none of these options are used. The available WIP replenishment method options include: *Workflow:* The system generates a worklist entry that takes you to the Production Replenishment worklist and uses defaults for the item, quantity, and from/to WIP locations. You can override the values to complete the transfer. *Pull Ticket:* You create a one-time replenishment request through either a backflush or a manual scan and run the Pull Ticket print process to print the pull ticket. This is similar to a one-time Kanban card. You scan in the Kanban ID, and the system supplies the default item, Kanban quantity, source, and WIP location information. *Pull List:* A pull list is a list of Kanban requests that you use in a manner similar to the way you use a pick list. You scan in Kanban IDs to transfer quantities. You run the Pull List process on a scheduled basis, which picks up all new requests. As you do with pull tickets, you scan in the Kanban ID from the pull list to process each request.
Source Location	If you select *Inventory* as the WIP replenishment source, this field is available for entry. Select the source storage location that replenishes this item. The location field is not mandatory but, if entered, must be a valid location. The storage levels that appear depend on the storage structure that is established on the Inventory Options page, which you access from the Set Up Financials/Supply Chain - Business Unit Related - Inventory menu.

Related Links

"Flow Production" (PeopleSoft Manufacturing)

"Searching for Material Storage Locations" (PeopleSoft Inventory)

Define Business Unit Item - Planning: General Page

Use the Define Business Unit Item - Planning: General page (PL_ATTRIB_INV) to specify Planning information for an item.

Navigation:

Items > Define Items and Attributes > Define Business Unit Item > Planning

This example illustrates the fields and controls on the Define Business Unit Item - Planning: General page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Planner Cd (planner code)	Planner codes are used to filter information in most pages and processes in PeopleSoft Supply Planning. Third-party forecasting applications also use planner codes. You set up planner codes by using the Planner Code page, which you access from the Set Up Financials/Supply Chain - Product Related - Planning menu.

Field or Control	Description
Planned By	Select one of these methods: *Distribution Planning:* Select this method if you want to include the item in the distribution plan. The distribution plan typically displays the tasks that are quantities associated with the movement of the item throughout the distribution and manufacturing business units of the supply chain. Distribution-planned items are included in the PeopleSoft Supply Planning data model. You should select this option if the item is planned across multiple business units and is either a transfer or purchase item. A distribution-planned item is most likely a finished good or spare part that is used to fulfill customer demand at an inventory-only business unit. *Master Planning:* Select this method if you want to include the item in the master plan. The master plan provides a schedule of planned orders for the item at each manufacturing site. Typically, master-planned items are the top-level, finished-good manufactured items. Master-planned items can be included in either PeopleSoft Supply Planning models. You use the Manufacturing Business Unit Options page to specify which model (Supply Planning) includes the master plan. When the master plan is included in the PeopleSoft Supply Planning model, the system models production in a collapsed, aggregate view of all production capabilities for the item that is associated with the business unit. In addition, new planned orders and rescheduled messages for production can be returned from the planning server. When the master plan is included in the PeopleSoft Supply Planning model, the system models production based on the detailed bills and routings that are defined for the item in PeopleSoft Manufacturing. *Material Planning:* Select this method if you want to include the item in the material plan. The material plan schedules the raw materials and subassemblies that are required, supporting the production of finished goods. Material-planned items are included in the PeopleSoft Supply Planning model only. *Not Planned:* Select this method if you do not want to include the item in any of the PeopleSoft Supply Planning generated plans.
Forecasting Item	Select to indicate that this item is available as a Forecasting item.
Inventory Policy Planning Item	A non-active field that is related to a deprecated product.

Field or Control	Description
Use Ship To Locations	Select this option if you want to model sourcing requirements for new planned purchase orders based on the ship to location information that is established for suppliers within PeopleSoft Purchasing. By using the ship to location information, you can establish specific purchase–source definitions for a single inventory business unit. This information is used by the PeopleSoft Supply Planning solvers for modeling purposes. **Note:** If you do not make a selection in the Planning Sourcing group box, the system bases the sourcing requirements for new planned orders on the item/supplier information. You can only select one value in the group box. To change selections, deselect the current value and select a new value.
Use Item Supplier By Region	Select to have the system model sourcing requirements for new planned purchase orders based on item supplier by region information that is established for suppliers within PeopleSoft Purchasing. This information is used by PeopleSoft Supply Planning solvers for modeling purposes.
Spot Buy	Select to indicate that this item is used by PeopleSoft Strategic Sourcing. When you select the **Spot Buy** check box, the system does not consider the ship to, supplier region, or PeopleSoft Purchasing item supplier attributes. Instead, it generates only a generic purchase option, and enables you to select the supplier later using PeopleSoft Sourcing. This information is used by PeopleSoft Supply Planning solvers for modeling purposes.

Define Business Unit Item - Planning: Fences Page

Use the Define Business Unit Item - Planning: Fences page (PL_ATTRIB_INV2) to define how to generate item supply by determining the planning time, planning message parameters, safety stock and excess stock parameters, and other general information regarding how you generate supply for inventory items.

Navigation:

Items > Define Items and Attributes > Define Business Unit Item > Planning: Fences

This example illustrates the fields and controls on the Define Business Unit Item - Planning: Fences page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Planning Time Fence [days]	Identifies when changes or recommendations for an item are difficult to react to. You typically set this time fence to the cumulative lead time of the item. When the system generates messages, any message for an order with a start date that is equal to or less than the planning time fence receives a status code of *Before Planning Time Fence* in the appropriate review page in PeopleSoft Manufacturing, PeopleSoft Inventory, or PeopleSoft Purchasing. This alerts you to changes occurring early in the planning horizon that can be difficult to react to.
Action Message Cutoff [days]	Tells the Receive Planning Messages process to stop creating action messages. The system generates recommendations for new orders only after this time fence. It does not generate recommendations for cancellations or reschedules. When the system generates messages for new orders, any message for a planned order with a start date that is greater than the cutoff time fence receives a status code of *After Cutoff Fence*. PeopleSoft Supply Planning uses message filters to reduce the number of planning system messages that require review in PeopleSoft Manufacturing, PeopleSoft Inventory, PeopleSoft Purchasing, and PeopleSoft Order Management. Each filter has a set tolerance that tells the system whether the message is automatically approved.

Field or Control	Description
Reschedule In Factor [days] and **Reschedule Out Factor [days]**	Set tolerances for recommendations to move an order. For example, if you set both factors to *5* and the production date is December 10, then planning automatically approves any order between the reschedule in date of December 5 and the reschedule out date of December 15 without going to the appropriate review page. This applies only if the change is a reschedule.
Safety Stock Level	Enter the quantity of the item that you keep on hand to buffer against stock outages. If you want to change the safety stock level from period to period, you can set up a time-phased safety stock level on the Stocking Periods page in the Define Controls menu. PeopleSoft Supply Planning always uses the Stocking Period record first. If no record exists there, then the system uses the static quantity that you enter in the Define Business Unit Item Planning: Order Modifiers page.
Excess Stock Level	The upper limit that you place on the quantity of the item to buffer against overstocking. You can also define excess stock levels (along with safety stock) on the Stocking Periods page.
Fixed Period [days]	Determines how far the system looks ahead for demand as you determine the amount of supply that is required during the creation of a new supply order. PeopleSoft Supply Planning uses this value when generating all supply (production, purchase, and transfer). When using the fixed period value, the system respects the order modifiers (minimums, maximums, and multiples) that are defined when you use the Define Business Unit Item - Planning: Order Modifiers page.
Use Global Early Fence	Select to indicate that the system will use the early fence value that is defined on the Load Planning Instance component.
Early Fence	Enter a number of days (negative or positive) that will be used from any planning date to determine a boundary before which planning solvers make no changes to supply or demand tasks. For example, if the current planning date is January 15, 2000 and the early fence is set to 2, then the planning solver will make no changes to supply or demand tasks before January 17, 2000.

Field or Control	Description
New Order Fence	Define how the system uses the order start date to assign statuses to planned production orders that are received from a planning engine session. If you leave both fields in this group box blank, the system assigns the entered status to all new planned orders. To create all planned orders in the *Released* status, you can enter a value of *999* for the **Released Order** fence field and leave the **Firmed Order** fence field blank. Alternatively, to create all planned orders in the firmed status, enter a value of *999* in the **Firmed Order** fence field and leave the **Released Order** fence field blank. If you enter a value in the **Released Order** fence field and nothing in the **Firmed Order** fence field, then all the planned orders that are between the day that you run the Receive Planning Messages process and the released order fence days are created in the *Released* status. The planned orders that are scheduled after that day are created in the *Entered* status. When you review planning messages by using one of the planning message pages, the system determines the status of new planned orders based on these fences that are defined for the items. You can change the status during the planning message review process.
Released Order	Indicates the number of days from the current date that the system sets planned orders to the *Released* status when planning messages are received, reviewed, and applied.
Firmed Order	Enter the number of days that represents planned orders that are created in the *Firmed* status. The system creates all planned orders that are scheduled after the firmed order fence in the *Entered* status.

The following diagram illustrates time fences for new orders. In this diagram, a released order fence of 30 days and a firmed order fence of 60 days is set. The system creates all new planned orders with start dates that are between the current date and 30 days in the future as *Released.* The system creates all planned orders with start dates that are between 31 and 60 days as *Firmed,* and all planned orders beyond 60 days as *Entered*:

Example of how the New Order Fence group box impacts the status of new orders
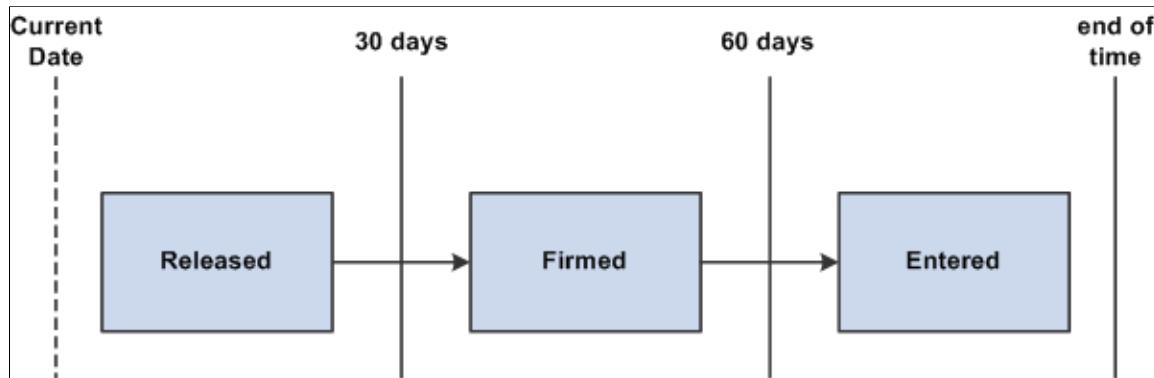
Define Business Unit Item - Planning: Forecast Page

Use the Define Business Unit Item - Planning: Forecast page (PL_ATTRIB_INV3) to define forecast parameters by determining the parameters to control forecast consumption and incremental material supply and consumption.

Navigation:

Items > Define Items and Attributes > Define Business Unit Item > Planning: Forecast

This example illustrates the fields and controls on the Define Business Unit Item - Planning: Forecast page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Forecaster	Enables you to restrict, or segment, the demand data extracts to these item-forecaster records.
UOM Group	Select the UOM Group that determines the type of measurement for this item. PeopleSoft Inventory Policy Planning uses the group to correlate different units of measure so that the system produces a single standard UOM output for a specified UOM group. You use UOM groups for informational purposes so that you can associate units of measure with certain quantities.
Demand Time Fence [days]	Manages forecast consumption in the planning process. The demand time fence days is often set to the finishing lead time for an item, based on the current system date plus the demand time fence for the item. Before the demand time fence, forecast is ignored: only actual orders are used as demand. After the demand time fence, the greater of actual orders or forecast consumption is used as demand.
Forecast Adjustment Action	Select an action to indicate how the forecast is allocated for PeopleSoft Supply Planning. Forecast adjustment alters the quantity of the next forecast planning bucket quantity to match the known actual demand. This is done by taking the unconsumed forecast from before the demand fence and prorating the unconsumed forecast to periods after the demand fence. Various actions are available to control how the unconsumed forecast is to be prorated.
Forecast Fulfillment Size	Define the numerical value that you want to use when dividing the total forecast demand into portions that make up task quantities. The PeopleSoft Supply Planning application uses the fulfillment size when it attempts to meet certain portions of the forecast if the total forecast cannot be met entirely. The system divides net forecasts into tasks that are associated with the original planning period, and each task represents a portion of the quantity that is required to meet the forecasted demand. These tasks represent the movable portions of a forecast when you make a feasible plan and allow the system to reschedule top-level demand.

Field or Control	Description

Explode Demand for Consumption	Select this option if you use:
	
	• PeopleSoft Supply Planning and you want to explode sales order demand or transfer demand for forecast consumption at the inventory item level.
	
	  If production demand forecasts exist, the system explodes sales order demand or transfer demand for some end items by calculating the production demand that is to be used for forecast consumption. If you do not select the check box, the system doesn't explode the sales orders or transfer orders for the item.
	
	• PeopleSoft Supply Planning and you want to explode sales order demand for forecast consumption at the inventory item level.
	
	  If production demand forecasts or transfer demand forecasts exist, the system explodes sales order demand for some end items by calculating the production demand or transfer demand that is to be used for forecast consumption. If you do not select the check box, then the system doesn't explode the sales orders for the item.

Aggregate Demand	Identifies the item as representing a group of items for forecast consumption. For an aggregate demand item, you establish aggregate demand children. The forecast for the aggregate demand children is rolled up to one demand total for the aggregate demand item. Forecast consumption is then performed at the aggregate-item level rather than at the individual-item level. You can identify both planning items and inventory items as aggregate demand items.
Forecast Consumption Method	Select the types of demand that PeopleSoft Supply Planning will use to consume the forecast.

Define Business Unit Item - Planning: Order Modifiers Page

Use the Define Business Unit Item - Planning: Order Modifiers page (PL_ATTRIB_INV4) to define order modifiers for planning by determining planned transfer, purchase, and order quantity default values for a manufactured item.

PeopleSoft Supply Planning use these values when creating planning models. When planning transfers between business units, purchases from suppliers, or the production of items using PeopleSoft Manufacturing, consider defining modifiers to set up guidelines when creating planned supply in PeopleSoft Supply Planning.

Navigation:

Items > **Define Items and Attributes** > **Define Business Unit Item** > **Planning: Order Modifiers**

This example illustrates the fields and controls on the Define Business Unit Item – Planning: Order Modifiers page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Transfer Attribute	Transfer order modifiers that you enter are used as defaults on the Inventory Transfer Attributes pages that establish relationships between business units (destination and sourcing) and items. Order modifiers on the Inventory Transfer Attributes pages take precedence over order modifiers that are defined at the item level.
Transfer Yield and Purchase Yield	Enter the usable output, expressed as a percentage. This is used in planning to inflate the planned quantity on transfers or production orders to account for any loss that may occur during transport or production. For example, if you're expecting the yield of quality items from a transfer to be 90 percent of the delivered items and you need 90 items, then you should order 100 items to fulfill requirements.

Define Business Unit Item - Planning: Solvers Page

Use the Define Business Unit Item - Planning: Solvers page (PL_ATTRIB_INV5) to specify a 'Tolerance' for lateness within which MRP solver can consider the supply.

Navigation:

Items > **Define Items and Attributes** > **Define Business Unit Item** > **Planning: Solvers**

This example illustrates the fields and controls on the Define Business Unit Item – Planning: Solvers page. You can find definitions for the fields and controls later on this page

Field or Control	Description
Reschedule Tolerance (in days)	Specify a tolerance value for lateness of an item in calendar days. You can specify a tolerance value starting from 0 (default value) up to 999 days. The value in the **Reschedule Tolerance (in days)** field indicates a tolerance window to consider late supply before creating new supplies. If supply order falls inside specified window, existing supply order is considered first before any new supply orders can be created.

Assigning Serial Numbers Automatically

This topic discusses how to assign serial numbers automatically.

Page Used to Assign Serial Numbers Automatically

Page Name	Definition Name	Usage
Automatic Serial Numbers Page	AUTO_SERIAL_NUM	Define criteria to automatically generate serial numbers.

Understanding how to Assign Serial Numbers Automatically

To assign serial numbers automatically, use the Automatic Serial Numbers (AUTO_SERIAL_NUM_GBL) component. Use the AUTO_SERIAL_NUM_CI component interface to load data into the tables for this component.

When you assign serial numbers to items on a regular basis, you can streamline the data-entry process by establishing default automatic-numbering rules. If the installation includes PeopleSoft Purchasing or

PeopleSoft Manufacturing, you can use this default information to assign serial numbers for items that are received in inventory or for completed assemblies that are being moved to another production area.

Automatic Serial Numbers Page

Use the Automatic Serial Numbers page (AUTO_SERIAL_NUM) to define criteria to automatically generate serial numbers.

Navigation:

Items > **Define Items and Attributes** > **Define Serial Number Sequences**

Note: If you do not define defaults by using this page, you can enter the information manually while receiving items or recording assembly completions.

Field or Control	Description
Last Serial Number	If you are generating shipping serial labels, the value in this field is updated by PeopleSoft Inventory. If you use PeopleSoft Manufacturing, the Completions process does not update this field.
Zero Pad	Select this option if you want to use zeros as placeholders for the serial number length that you define.

Related Links

"Understanding Electronic Data Collection" (PeopleSoft Supply Chain Management Integration)
"Rapid Serial Numbers Page" (PeopleSoft Manufacturing)

Chapter 6

Loading Items

Understanding Item Loading

Several ways are available to update the master data tables with inbound data to the item master. These data loads enable you to update or add items, change pricing, update potential suppliers for each item, and change item attributes. You can add or update item data by using these options:

- The Item Price List and Item Master EIPs.

- A Microsoft Excel spreadsheet with the PeopleTools Excel-to-component-interface utility.

- MarketPlace item updates using the MarketSite CUP file.

- The PeopleSoft eProcurement xCBL interface.

- PeopleSoft Catalog Management System product loads.

- PeopleSoft Group Purchasing Organization (GPO) contract interface.

Each option enables you to load data into staging tables before loading the item data into master data tables. While the data is in the staging tables, validation and error correction can be completed. You can use Workflow to notify you when items do not load into the item master tables. You can view and correct data loads by using the Data Definition Maintenance component.

After the items are loaded into the master data tables, you can change several items at the same time by using the Catalog Maintenance Extract (PO_EXPORT_CRITERIA) process. This process enables you to download items from master data tables to the Item Loader staging tables, where you can alter the items using the Catalog Maintenance Update (PO_MASS_UPDATE) process or the Data Definition Maintenance (IN_EIP_ITEM_MAINT) component.

Note: This topic does not discuss the product load, GPO contract interface, or catalog maintenance extract.

Related Links
Understanding Item Catalog Maintenance
"Understanding the Integration Between a Marketplace and PeopleSoft eProcurement" (PeopleSoft eProcurement)
"Understanding Supplier Data" (PeopleSoft eProcurement)
"Loading Catalogs into PeopleSoft eProcurement" (PeopleSoft eProcurement)

Understanding Staged Item Maintenance

The PeopleSoft system provides tools to import and maintain item catalog data. The Item Loader feature enables you to import item catalog data into staging tables, where you can manipulate item information by using the Item Loader Data Maintenance pages before loading the data into the master data tables.

The Item Loader feature supports two business processes for updating the master data tables with item data that is staged by third-party applications. These business processes enable you to:

• Import item price data that is received from suppliers.

• Import item data to synchronize item records with those on a third-party system.

For both business processes, the Staged Item Load process (IN_ITMLOAD) validates item data in staging tables and updates the master data tables with the valid records. Records with invalid data remain in the staging tables, and you can correct them online using the item Data Definition Maintenance component.

Note: While an item exists in the item staging tables, any changes that are made to the item in the master item data are overwritten when you run the Item Loader process.

Related Links
Understanding Item Catalog Maintenance

Understanding Item Price List and Item Master EIPs

The Item Price List EIP enables you to receive item price data from third-party sources. The third-party source sends the item price data using a flat file or an XML based service operation to load data into the item price list staging tables. A third-party system can send item price information using the ITEM_PRICELIST_LOAD service operation in the ITEM_CATALOG_PRICE queue.

The Item_PriceList_Load service operation is specific to loading supplier items. You cannot create an item without providing a supplier using this feature. If the price that is sent by the supplier is for the same unit of measure (UOM), currency code, and date as the one that exists in the system, the price will be updated. If any of these attributes are different, the price will be inserted as a new effective-dated row. In the event that the supplier does not provide the date, the Item_PriceList_Load service operation will use the system date.

The Item Master EIPs enable you to send and receive item master data to and from third-party sources. The third-party system sends the item master data using an XML based service operation to load data into the item loader staging tables. You can send item master data to a third-party system using the ITEM_SYNC, ITEM_SYNC_EFF, ITEM_FULLSYNC, or ITEM_FULLSYNC_EFF service operation in the ITEM_MAINTENANCE queue. A third-party system can send item master information using the ITEM_SYNC or ITEM_FULLSYNC service operation in the ITEM_MAINTENANCE queue.

Item records that are received through the item master EIPs are staged directly in the Item Loader staging tables. No intermediate staging or processing is required. Additionally, you can specify whether the Item Loader process should be launched automatically or manually as part of the item master EIP setup.

To set up the Item Loader process to start automatically as a part of the item master EIP setup:

1. Access the Enterprise Components - Data Maintenance Utility Setup component.

2. Select a transaction type of *Item*.

3. Select the **Flag 1** option to automatically start the Item Loader process for the item records in each item master service operation that is received.

    If the **Flag 1** option is not selected, the new item records are inserted in the Item Loader staging tables, and you must start the Item Loader process manually to update the master data tables.

See the product documentation for *PeopleTools: PeopleSoft Integration Broker*.

Related Links

Loading Items and Prices Using the Item Price List EIP

Understanding Item Loader Data Flow

"Integration Implementation" (PeopleSoft Supply Chain Management Integration)

Understanding Item Loader Data Flow

The following diagram illustrates the data flow of the Item Loader process. The Item Price List and Item Master EIPs provide the mechanisms for populating the Item Loader staging tables. Next, the Item Loader process acts on the Item Loader staging tables to load item data to the PeopleSoft system master data tables. Any data errors in the incoming information can be viewed and corrected using the Item Loader Data Maintenance pages:

The data flow of the Item Loader process
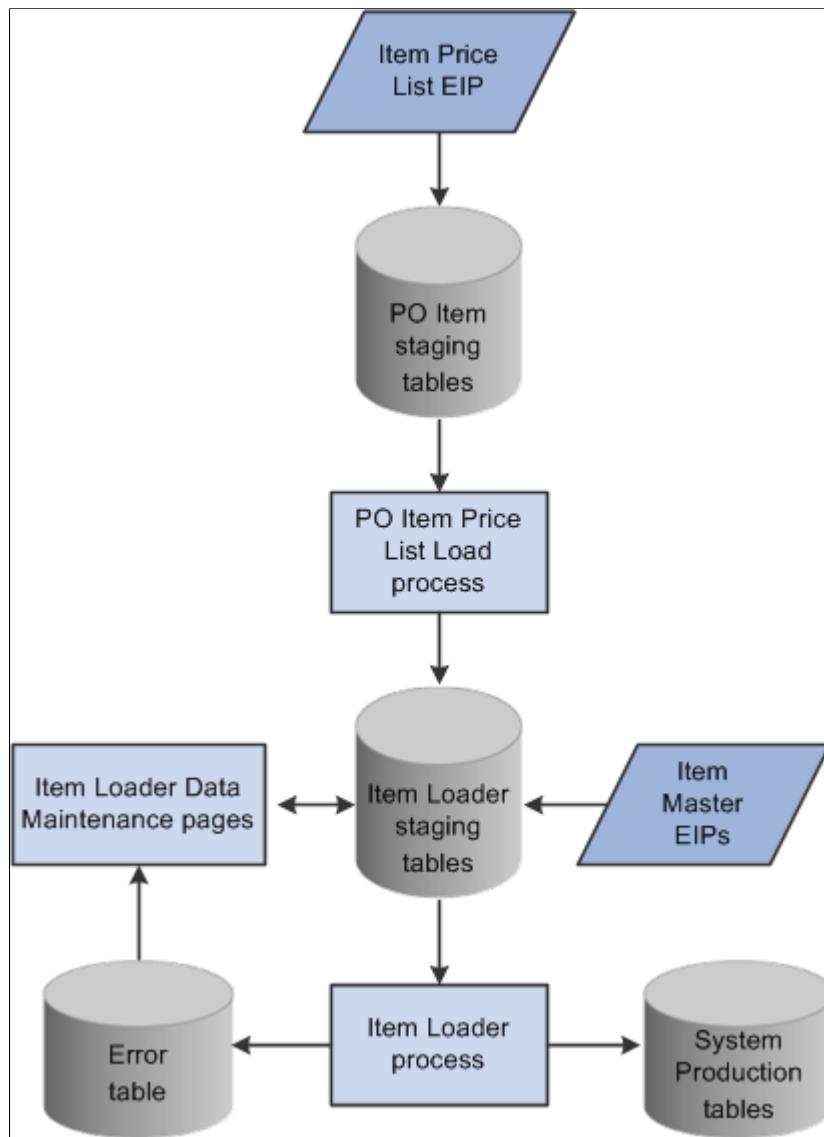
Related Links

Item Price List Page
Running the Item Loader Process
Editing Data Errors in the Item Loader Staging Tables

Setting Up the Item Price List EIP

The Item Price List EIP is an asynchronous inbound service operation that receives price list information from a third-party system.

Enabling the Item Price List EIP

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

1. Setup within the PeopleSoft Inventory application.

   This service operation has no application-specific setup.

2. Setup within PeopleSoft Integration Broker and Enterprise Components:

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
ITEM_PRICELIST_ LOAD	Inbound Asynchronous	ItemPriceListLoad	No	Third-party system

See the product documentation for *PeopleTools: PeopleSoft Integration Broker*.

Related Links
"Setting Up Service Operations" (PeopleSoft Supply Chain Management Integration)

Loading Items and Prices Using the Item Price List EIP

This topic discusses how to load item price list data from a message or flat file to the item loader staging tables by using the Item Price List Load (RUN_PO_ITMLOAD) process. The new item records are inserted in the Item Loader staging tables with a *Hold* status.

To load item price list data, you complete these steps:

1. Process the XML message (Item_PriceList_Load) or a flat file (PRICELIST).

2. Run the Item Price List Load application engine process (PO_ITMLOAD).

3. Run the Item Loader process (IN_ITMLOAD).

4. Review errors.

Pages Used to Load Items and Prices Using the Item Price List EIP

Page Name	Definition Name	Usage
Inbound File Publish Page	EO_FILETOMSG	Run the Inbound File Publish process to transfer data that is in a flat file into the item price list load staging tables.

Page Name	Definition Name	Usage
Item Price List Page	RUN_PO_ITMLOAD	Run the item price list load application engine process to specify the parameters for the PO Item Price List Load (purchase order item price list load) process.

Related Links
Editing Data Errors in the Item Loader Staging Tables

Inbound File Publish Page

Use the Inbound File Publish page (EO_FILETOMSG) to run the Inbound File Publish process to transfer data that is in a flat file into the item price list load staging tables.

Navigation:

Enterprise Components > Integration Definitions > Initiate Processes > Inbound File Publish

This example illustrates the fields and controls on the Inbound File Publish process page. You can find definitions for the fields and controls later on this page.

Transactions are processed automatically. You must load flat files using the Inbound File Publish page. Item data is placed into the item price list staging tables (ITM_LOAD_MST_EC, ITM_LOAD_INV_EC, ITM_LOAD_PUR_EC, and ITM_LOAD_VND_EC).

Item Price List Page

Use the Item Price List page (RUN_PO_ITMLOAD) to run the item price list load application engine process to specify the parameters for the PO Item Price List Load (purchase order item price list load) process.

Navigation:

SCM Integrations > **Process Transactions** > **Items** > **Item Price List Batch Load** > **Item Price List Load**

This example illustrates the fields and controls on the Item Price List page. You can find definitions for the fields and controls later on this page.

Use the Item Price List Load process (PO_ITMLOAD) to add system default values to the item definitions and to move items from the item price list staging tables to the item loader staging tables. The new item records are inserted in the item loader staging tables with a status of *New.*

Process Request Parameters

Field or Control	*Description*
All SetIDs	Select to load item records with any SetID attribute. If you do not select this check box, enter a value in the **SetID** field to restrict the loading process to a specific SetID.
All Suppliers	Select to load item records with any supplier attributes. If you do not select this check box, enter values in the **Supplier SetID** and **Supplier ID** fields to restrict the loading process to a specific supplier SetID or supplier.
All Manufacturers	Select to load items with any manufacturer attribute. If you do not select this check box, enter a value in the **Manufacturer ID** field to restrict the loading process to a specific manufacturer ID.

Note: If the system does not find the manufacturer attributes that are associated with imported item data in the Manufacturer table (MANUFACTURER), it creates a new manufacturer.

Run Options

Field or Control	Description
Purchasing Dflts From Category (purchasing defaults from category)	Select to use the item category defaults that you established in the Item Categories (CATEGORY_TBL) component when creating the Purchasing Item Attributes segment of the item.
Delete Loaded Items	Select to delete item records from the item price list staging tables as they are copied to the item loader staging tables. This setting enables you to work with smaller batches of item information by running the Item Price List Load process several times against the same item price list load staging tables until all records in the tables have processed. To keep the data in the staging tables for audit purposes, do not select this check box.
Auto Assign ID (automatically assign ID)	Select the method by which the process assigns item IDs: *For All New Items* or *When Item ID is not specified.*
Default Item Setid	Select the SetID that you want assigned to the loaded items if the item SetID is not provided.
Default Supplier Setid	Select the SetID that you want assigned to the loaded items if the item supplier SetID is not provided.

Related Links
"Defining Purchasing Item Categories" (PeopleSoft Purchasing)

Running the Item Loader Process

Run the item loader process (IN_ITMLOAD) to validate and transfer the item data into the PeopleSoft master data tables.

Related Links
Loading Staged Item Data Using the Item Master EIP

Reviewing Errors

Use the Data Definition Maintenance page to review any errors that did not pass the validation portion of the Item Loader process.

Related Links

<u>Editing Data Errors in the Item Loader Staging Tables</u>

Setting Up the Item Master EIP

The Item Master EIPs include four XML-based service operations defined in PeopleSoft Integration Broker: ITEM_SYNC, ITEM_SYNC_EFF, ITEM_FULLSYNC, and ITEM_FULLSYNC_EFF. Activate the ITEM_SYNC service operation to send incremental updates automatically as item information is updated online or by using the Change Item Status process (INS4000), Item Loader process (IN_ITMLOAD), or Publish Outbound Message process. Activate the ITEM_FULLSYNC service operation to perform full data replication by scheduling a batch process using the Full Data Publish utility. This process generates an outbound transaction containing item information.

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

Enabling the Item Master EIPs

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

1. Setup within the PeopleSoft application.

   These service operations have no application-specific setup.

2. Setup within PeopleSoft Integration Broker and Enterprise Components.

   Use the information in the following table and refer to the setup instruction in "Setting Up Service Operations" (PeopleSoft Supply Chain Management Integration).

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
ITEM_SYNC	Outbound and Inbound Asynchronous	ItemSync ItemSyncEff ROUTERSENDHDLR	Yes	Third-party system
ITEM_SYNC_EFF	Outbound Asynchronous	ROUTERSENDHDLR	Yes	Third-party system
ITEM_FULLSYNC	Outbound and Inbound Asynchronous	ItemFullSync ROUTERSENDHDLR	Yes	Third-party system

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
ITEM_FULLSYNC_ EFF	Outbound Asynchronous	ROUTERSENDHDLR	Yes	Third-party system

See the product documentation for *PeopleTools: PeopleSoft Integration Broker*.

Loading Staged Item Data Using the Item Master EIP

This topic discusses how to run the Item Loader process.

To load item master data by using an item master EIP:

1. Process the item data.

   A third-party system can send item data using these Item Master EIPs:

   • ITEM_SYNC

   • ITEM_FULLSYNC

2. Run the Item Loader process (IN_ITMLOAD) either manually or from the subscription process.

3. Review errors.

Page Used to Load Staged Item Data Using the Item Master EIP

Page Name	Definition Name	Usage
Item Loader Page	RUN_IN_ITMLOAD	Run the Item Loader process to validate data in the Item Loader staging tables and update the PeopleSoft master data tables.

Related Links
Editing Data Errors in the Item Loader Staging Tables

Item Loader Page

Use the Item Loader page (RUN_IN_ITMLOAD) to run the Item Loader process to validate data in the Item Loader staging tables and update the PeopleSoft master data tables.

Navigation:

SCM Integrations > **Process Transactions** > **Items** > **Item Loader**

This example illustrates the fields and controls on the Item Loader process page. You can find definitions for the fields and controls later on this page.

Using the parameters that are defined on the Item Loader page, the Item Loader process:

- Validates the item records in the Item Loader staging tables.

- Logs any errors that it finds.

- Updates the master data tables with the valid item data.

Records with invalid data remain in the Item Loader staging tables with an *Error* status. You can edit them online by using the Data Definition Maintenance pages.

After correcting the data errors, you can rerun the Item Loader process to populate the master data tables with the corrected item records.

Note: If you anticipate receiving large numbers of item records, manually schedule the Item Loader process to avoid peak processing times.

Warning! Use extreme care when updating the master data tables, especially when modifying existing item data. The Item Loader process cannot be reversed.

Item Loader Parameters

Field or Control	Description
Item Load Type	Select the staging source of the records in the Item Loader staging tables that you want to load to the master data tables:
	Item Export: Select to process item data that is extracted to the staging tables by the Catalog Maintenance Extract process. Selecting this option enables the Template ID field.
	Item Fullsync: Select to process item data that is staged with the Item Master service operation ITEM_FULLSYNC.
	Item Load From Excel: Select to process item data that is staged with the Excel interface.
	Item Mfg GPO: Select to process item data that is staged with the GPO Load service operation ITEM_MFG_GPO_LOAD.
	Item Pricelist: Select to process item data that is staged with the Item Price List service operation ITEM_PRICELIST_ LOAD. Select this option to load item and price data from PeopleSoft eProcurement staging tables, including CUP and xCBL files.
	During the load process, the system retrieves the item ID based on the supplier item ID, manufacturing item ID, or the UPN ID keys provided in the message and converts the external UOM to the PeopleSoft UOM using the XML Mapper setup.
	The system sets only one UOM for the item supplier as a default value when multiple default UOMs are provided in the message, when the default value already exists in the staging table, and when a UOM has not been set as a default value.
	Item Sync: Select to process item data that is staged with the Item Master service operation ITEM_SYNC.
All Item SetIDs	Select to load item records with any SetID attribute. If you do not select this check box, enter a value in the **SetID** field to restrict the loading process to a specific SetID. This field is not available when you select *Item Export* in the **Item Load Type** field.
Template ID	Enter the Catalog Maintenance Template ID when you have chosen the *Item Export* option in the Item Load Type field.

Field or Control	Description
All EIP_CTL_IDs	Select to load item records with any EIP control ID attribute that is associated with the transaction that is specified in the **Item Load Type** field. If you do not select this check box, specify a range of EIP control IDs in the **From** and **To** fields.
All Message Instances	Select to load item records with any publication information that is associated with the transaction that is specified in the **Item Load Type** field. If you do not select this check box, then you should specify a publication node and ID.
Market Code	Select the type of market codes to use for the loaded items: *User Defined* or *UN/SPSC* (United Nations Standard Product and Services Codes). Use the Item Categories component to establish user-defined market codes.
Item Template List ID	Select a configurable item template to be used for the loaded items. This field is only used if no item template list ID was provided by the source data in the Item Loader staging tables. This field does not override an item template list ID from the source data. See Using Configurable Item Templates with the Item Loader Process.
Purge Cancelled Transactions	Select to purge item records that are marked for cancellation in the staging table. The records that are selected for purge must also meet the other criteria that you have set for the process.
Only Run Validation portion	Select to run only the data validation portion of the process. This feature enables you to check the data for errors before updating the master data tables. Correct any errors by using the Data Definition Maintenance pages.
Re-process any Errors in Range	Select to reprocess any item records in error that meet the criteria that you have set for the process.

Field or Control	Description
Re-process any Hold in Range	Select to reprocess any item records with a *Hold* status that meet the criteria that you have set for the process.
	Note: You must select the **Re-process any Hold in Range** check box to process item records that are staged with the Item Price List service operation ITEM_PRICELIST_LOAD. This is because when the item Price List Load process loads Item Price List EIP data to the item loader staging tables, it inserts new item records with a *Hold* status.
Update Standard Price	Select to update standard prices when an item/supplier UOM price record is loaded. This field is available only if *Item Pricelist* is selected in the **Item Load Type** field. Future effective-dated prices will not go into effect until the Item Price List Batch Load (PO_ITMLOAD) process is run on or after the effective date.
Update Business Unit Price	Select to update standard prices for the business unit when an item/supplier UOM price record is loaded. This field is available only if *Item Pricelist* is selected in the **Item Load Type** field. If the *Item Pricelist* field is selected, the new price is applied to all business units that match the SetID and item combination and that have the **Business Unit Update Price** check box selected on the BU Specific Attributes (business unit specific attributes) page. Future effective-dated prices will not go into effect until the Price Update process is run on or after the effective date.

Related Links

Editing Data Errors in the Item Loader Staging Tables

Extracting Item Data

"Update PO Price Page" (PeopleSoft Purchasing)

Sending Outbound Item Data with the Item Loader Process

In addition to updating the master data tables with inbound item master data, you can set the Item Loader process to publish item data using an Item Master EIP as part of each processing run. The outbound transaction contains the item data that was used to update the PeopleSoft master data tables. Third-party applications that need to synchronize their table records with the PeopleSoft application records can subscribe to this service operation.

To publish (send) an outbound transaction from the Item Loader process, use the Batch Publish Rules component to activate the IN_ITMLOAD batch publish rule for the ITEM_SYNC message.

Editing Data Errors in the Item Loader Staging Tables

View and modify the item data that is staged in the Item Loader staging tables by using the Data Definition Maintenance component. The Item Loader process flags any records with data errors that have an *Error* status. From the Data Definition Maintenance component, you can access the Item Loader Data Maintenance pages, correct errors, and edit the staged item data.

After correcting the data errors, you can rerun the Item Loader process to populate the master data tables with the corrected item records.

The error is also found in the item loader error table (ITEMLOAD_ERR).

Pages Used to Edit Data Errors in the Item Loader Staging Tables

Page Name	Definition Name	Usage
"Data Def Maint Page" (PeopleSoft Supply Chain Management Integration)	EO_EIP_CTL_MAINT	Access the data definition maintenance - stage table data. The page provides information such as: the EIP control ID, the transaction type, reference data, the publishing node, the channel name, the last update date and time, and the process instance number.
Data Definition Maintenance - Errors Page	IN_EIP_ITEM_MAINT	Access the error details of Item Loader data. Access other pages where fields for specific segments of the Item Loader data can be edited.
Data Definition Maintenance - Item Definition - General: Common Page	IN_EIPITM_DEF1	Edit item definition fields in the SetID-level segment of staged Item Loader data. Data Definition Maintenance - Errors Page
Data Definition Maintenance - Item Definition - General: Classifications Page	IN_EIPITM_DEF4	Edit item definition fields in the SetID-level segment of staged Item Loader data.
Data Definition Maintenance - Item Definition - General: Dimensions Page	IN_EIPITM_DEF3	Edit item definition fields in the SetID-level segment of staged Item Loader data.
Data Definition Maintenance - Item Definition - General: Usage Page	IN_EIPITM_DEF8	Edit item definition fields in the SetID-level segment of staged Item Loader data.

Page Name	Definition Name	Usage
Data Definition Maintenance - Item Definition - General: Related Language Page	PV_EIPITM_DEF1	Edit item definition fields in the SetID-level segment of staged Item Loader data.
Data Definition Maintenance - Item Definition - Inventory: Tracking/ Description Page	IN_EIPITM_DEF2	Edit item definition fields in the SetID-level segment of staged Item Loader data.
Data Definition Maintenance - Item Definition - Inventory: Shipping/ Handling Page	IN_EIPITM_DEF5	Edit item definition fields in the SetID-level segment of staged Item Loader data.
Data Definition Maintenance - Item Definition - Inventory: Related Language Page	PV_EIPITM_DEF2	Edit item definition fields in the SetID-level segment of staged Item Loader data.
Data Definition Maintenance - Item UOM (item unit of measurement) - Item UOM Page	IN_EIPITEM_UOM	Edit item definition fields in the item UOM segment of staged Item Loader data. Data Definition Maintenance - Errors Page
Data Definition Maintenance - Item UOM - Item UOM Weight Volume Page	IN_EIPITEM_UOM_WVL	Edit item definition fields in the item UOM segment of staged Item Loader data.
Data Definition Maintenance - Item Revision - Item Revision Page	MG_EIPEN_REVISION	Edit item definition fields in the item revision segment of staged Item Loader data.
Data Definition Maintenance - Item Revision - Revision Text Page	MG_EIPEN_REV_TEXT	Edit item definition fields in the item revision segment of staged Item Loader data.
Data Definition Maintenance - Manufacturers Page	IN_EIP_ITEM_MFG	Edit item definition fields in the item manufacturer segment of staged Item Loader data. Data Definition Maintenance - Errors Page
Date Definition Maintenance - Universal Item Identifiers Page	IN_EIP_ITEM_UPN	Maintain data in the universal item identifiers segment on the item stage tables.

Page Name	Definition Name	Usage
Data Definition Maintenance - BU Attributes (business unit attributes) - General: Common Page	IN_EIPBU_GEN_ATTR	Edit item definition fields in the business unit and item definition segment of staged Item Loader data. Data Definition Maintenance - Errors Page
Data Definition Maintenance - BU Attributes - General: Usage Page	IN_EIPBU_MATRL_USG	Edit item definition fields in the business unit and item definition segment of staged Item Loader data.
Data Definition Maintenance - BU Attributes - General: Export Information Page	IN_EIPBU_GATTR_EXP	Edit item definition fields in the business unit and item definition segment of staged Item Loader data.
Data Definition Maintenance - BU Attributes - Inventory: Shipping/Handling Page	IN_EIPBU_OVRD_ATTR	Edit item definition fields in the business unit and item definition segment of staged Item Loader data.
Data Definition Maintenance - BU Attributes - Inventory: Replenishment Page	IN_EIPBU_RPLN_ATTR	Edit item definition fields in the business unit and item definition segment of staged Item Loader data.
Data Definition Maintenance - BU Attributes - Inventory: Weight/Volume Page	IN_EIPBU_WTVL_ATTR	Edit item definition fields in the business unit and item definition segment of staged Item Loader data.
Data Definition Maintenance - BU Attributes - Manufacturing: General Page	IN_EIPBU_MFG_ATTR	Edit item definition fields in the business unit and item definition segment of staged Item Loader data.
Data Definition Maintenance - BU Attributes - Manufacturing: WIP Replenishment Page	IN_EIPBU_MFG_ATTR2	Edit item definition fields in the business unit and item definition segment of staged Item Loader data.
Data Definition Maintenance - PO Attributes - Purchasing Attributes Page	PO_EIPITM_TBL_PUR	Edit item definition fields in the item purchasing attributes segment of staged Item Loader data.
Data Definition Maintenance - PO Attributes - Purchasing Controls Page	PO_EIPITM_TBL_PUR2	Edit item definition fields in the item purchasing attributes segment of staged Item Loader data.
Data Definition Maintenance - PO Attributes - Purchasing Controls 2 Page	PO_EIPITM_TBL_PUR3	Edit item definition fields in the item purchasing attributes segment of staged Item Loader data.

Page Name	Definition Name	Usage
Data Definition Maintenance - PO Attributes - Related Language Page	PV_EIPITM_DEF4	Edit item definition fields in the item purchasing attributes segment of staged Item Loader data.
Data Definition Maintenance - Categories Page	PV_EIPITEM_CAT	Edit item definition fields in the item category segment of staged Item Loader data.
Data Definition Maintenance - Item Supplier - Item Suppliers Page	PO_EIPITEM_VENDOR1	Edit item definition fields in the item supplier segment of staged Item Loader data.
Data Definition Maintenance - Item Supplier - Locations Page	PO_EIPITEM_VENDOR2	Edit item definition fields in the item supplier segment of staged Item Loader data.
Data Definition Maintenance - Item Supplier - UOM Page	PO_EIPITM_VND_UOM1	Edit item definition fields in the item supplier segment of staged Item Loader data.
Data Definition Maintenance - Item Supplier - UOM Price Page	PO_EIPITM_VND_UOM2	Edit item definition fields in the item supplier segment of staged Item Loader data.
Data Definition Maintenance - Item Mfg GPO Errors Page	IN_EIPITM_MFG_GPO	Edit item definition fields in the item manufacturer GPO segment of staged Item Loader data.

Related Links

"Data Def Maint Page" (PeopleSoft Supply Chain Management Integration)

Data Definition Maintenance - Errors Page

Use the Data Definition Maintenance - Errors page (IN_EIP_ITEM_MAINT) to access the error details of Item Loader data.

Access other pages where fields for specific segments of the Item Loader data can be edited.

Navigation:

SCM Integrations > **Transaction Error Handling** > **Transaction Error Data Defn**

Select the *ITEM* transaction type, and click the **Search** button.

Click the **Show Detail Entry** button for the desired row to view the error.

This example illustrates the fields and controls on the Data Definition Maintenance - Errors page. You can find definitions for the fields and controls later on this page.

If the staged Item Loader data contains errors, each field with an error appears in the **Errors** scroll area. The field name appears along with message text describing the problem and a record description. Click the **Detail** button to access the page where you can correct the error.

Click the links at the bottom of the page to access pages where you can modify the fields that are included in each segment of the message.

Note: If the Item Loader data for an item does not contain a specific message segment, you cannot access the corresponding pages.

Using the Excel-to-Component-Interface Utility

You can load item data into the Item Loader staging tables using a customized spreadsheet. This functionality enables you to import data from a legacy system to a PeopleSoft system during the conversion process.

This diagram shows the process of loading item data from a spreadsheet. Each step is discussed following the diagram:

Master Item Load Component Interface process
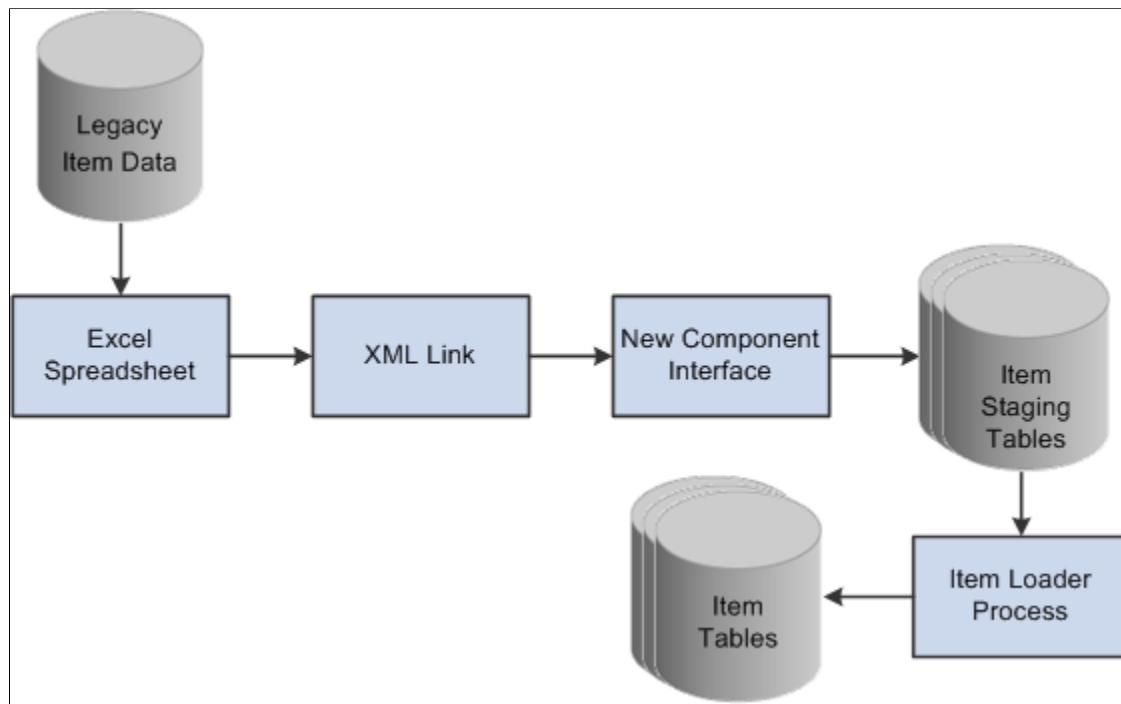
This process is divided into five steps:

1. Creating the spreadsheet.

2. Using the **XML** link.

3. Running the component interface.

4. Reviewing the item staging tables.

5. Running the Item Loader process.

Creating the Spreadsheet

The spreadsheet enables you to create a template of the fields that you will enter and specify the component interface that will be used. The data in the spreadsheet is merged with any default values. You then run a provided macro by using an XML link.

Purchasing item attributes are added to the master item spreadsheet, not the item supplier spreadsheet. Purchasing item attributes must be defined for an item before you add the item supplier data.

Using the XML Link

The XML link is a generic link that you use to enable the spreadsheet macro to communicate with the PeopleSoft component interface by using the *Add* mode.

Running the Component Interface

Two component interfaces are available that you can use to load item data:

• The first component interface, IN_MST_ITM_XLS, enables you to define new items.

If an item ID exists in the master item table, then the Item Loader process will reject this data. If an item ID is not provided, a new ID will be assigned. This component interface uses the same function as the item subscription to insert data into the staging tables. The component interface works only with those fields that are managed by the message. The records that are exposed during this component interface are:

- ITEM_MFG_CVW

- INV_ITM_UPN_CVW

- ITEM_CAT_CVW

- BU_ITM_INV_CVW (BU_ITM_WTVL_CVW and EN_REVISION_CVW)

- INV_ITM_CVW

- ITM_UOM_CVW

- MASTER_ITEM_CVW

- PUR_ITM_ATR_CVW

- The second component interface, IN_VND_ITM_XLS, enables you to define new supplier item data for existing items.

  You can provide SetID and INV_ITEM_ID or SetID and MFG_ID and MFG_ITEM_ID to identify the existing items. If the system does not find master item or purchasing item data, then the records are rejected by the component interface and are not added to the staging tables. The records that are exposed during this component interface are:

  - MASTER_ITEM_CVW

  - ITM_VND_CVW

  - ITM_VND_LOC_CVW

  - ITM_VND_UOM_CVW

  - ITM_VND_UMP_CVW

You cannot use both component interfaces to make changes to item data that exists in master data tables. You should make changes by using the Data Definition Maintenance component.

The Item Loader process performs the majority of the editing for errors; therefore, most errors are not returned to the spreadsheet by the component interface. You should review errors by using the Data Definition Maintenance component.

Note: If supplier item data is required, you must load IN_MST_ITM_XLS to add new item data before you load IN_VND_ITM_XLS.

Reviewing the Item Staging Tables

The component interface populates the staging tables.

Running the Item Loader Process

The Item Loader process picks up the data from the item staging tables, edits that data, and populates the Item Master data tables with the valid data. Editing for errors should be performed using the **Data Definition Maintenance** option.

Using a Configurable Item Template

You can use configurable item templates with this component interface. For more details, see the "Using Configurable Item Templates to Create Items" topic of this product documentation .

Related Links

Using Configurable Item Templates with the Item Loader Process
Item Loader Page
Editing Data Errors in the Item Loader Staging Tables

Chapter 7

Using Configurable Item Templates to Create Items

Understanding Configurable Item Templates

Setting up new items is a critical implementation task for any supply chain management system. During the item definition process, you want to define default values for many item attributes so that these values can be applied to your business transactions. Users can enter business transactions quickly and efficiently when less input is required. For example, if a particular item (such as aerosol cans) should always be shipped by ground transportation, then the item definition should include the value of *Ground* for the **Ship Via** field (item attribute). This default value populates any material stock request, so that the user is saved a data-entry step and does not need to remember this detail about aerosol cans. While it is helpful for your business transactions to have many default values for your item attributes, it can result in a time-consuming item setup process. There are many item attributes for an item ID assigned at both the SetID level and the business unit level. Configurable item templates help streamline the process of adding new items.

Configurable item templates provide a flexible way to assign default values to item attributes when you are setting up new items. The configurable template enables you to decide which attributes are populated, both at the SetID level and at the business unit level. Configurable templates can be used to add items:

- Using the Item Add component to manually add items one at a time.

- Using the Item Loader process to load a batch of new items. To populate the item loader staging tables you can:

  - Use the Item_Sync service operation within the PeopleSoft Integration Broker.

  - Use the IN_MST_ITM_XLS component interface to load a batch of new items from a Microsoft Excel spreadsheet.

Setting Up Configurable Item Templates

To add new items using configurable item templates, you enter a template list ID for the new items. A template list is a list of template groups joined together to define item attributes (fields) and their default values. The template groups can be mixed and matched on different template lists to efficiently provide different combinations for different types of items. A template list is created using a three-step process:

1. Create field group templates to identify the item attributes (fields) to be used and the rules for their use.

2. Create value group templates to enter the default values for the item attributes defined in an item template field group.

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3. Define an item template list to build a template for adding a type of item by combining various field group templates and value group templates.

Once you have created the template list, you can use the template list ID when adding new items individually or in batch. The default values and rules for data entry are enforced by the configurable item template.

Template Groups

The PeopleSoft system uses items in many different products within Supply Chain Management, including; PeopleSoft Inventory, PeopleSoft Manufacturing, PeopleSoft Purchasing, and PeopleSoft Engineering. Since the item definition is used in so many applications, the item attributes are grouped into logical categories at the SetID level and the business unit level. Both the item template field groups and item template value groups include the following groups:

Level	Group	Description
SetID	Master Item	This group contains the initial and critical field definitions for a new item. It is required for all template lists because you cannot add a new item without some of these attributes. This group includes basic item setup attributes, item codes, unit of measure setup, and substitute item information. Not all attributes in this group are required.
SetID	Purchasing Item Attributes	This group contains attributes needed to set up a purchased item within PeopleSoft Purchasing. The purchasing item attributes group includes basic purchasing item setup, ChartField definitions, asset information, and item specifications.
SetID	Product Item Attributes	This group contains attributes needed to define items as products within PeopleSoft Order Management and Enterprise Pricer. The product item attributes group includes basic product setup, attributes by unit of measure, and product margin data.
SetID	Manufacturer's Item Attributes	This group contains attributes needed to define a manufactured item for PeopleSoft Manufacturing.

Level	Group	Description
SetID	Item Supplier Attributes	This group contains attributes needed to define supplier information for a purchased item.
Business Unit	Business Unit Item	This group contains attributes needed to define an item within one or more PeopleSoft Inventory business units. The business unit item group includes attributes for basic item business unit setup, cost elements, configuration data, item dimensions, utilization codes, and planning attributes.
Business Unit	Inventory Management	This group contains attributes needed to run the day-to-day management of an inventory location, such as a warehouse. These attributes are defined at the PeopleSoft Inventory business unit and include picking zones, putaway zones, fixed picking locations, default putaway locations, and putaway rules.
Business Unit	Inventory Fulfillment	This group contains attributes needed to complete order fulfillment within one or more PeopleSoft Inventory business units. These attributes include fulfillment setup fields and automatic serial numbering setup.

Example of a Configurable Item Template

In this topic, an example is used to illustrate how the configurable item templates are used. Let's assume that in your work environment you frequently stock and sell spray paint in many colors. You frequently add aerosol spray paint cans as new items to the system and want the end-users to efficiently and correctly add the new items. You want to make sure that aerosol cans are stored in a cool, dry warehouse location and that they are shipped by ground transportation. You carry two sizes of cans, large and small. The paint color varies for each new item added, so you want the user to see the color field and populate it. You set up configurable item templates to prevent user-error and to efficiently add items both individually and in batch.

The following diagram illustrates how to setup configurable item templates. In this example, two template lists are set up; one for small aerosol spray cans and one for large aerosol spray cans. First, the field group templates are defined to include attributes important to the type of item to be added. Next, the value group templates are added to identify the default values that are used for aerosol cans. In the third step the template lists are created by combining different item templates for field groups and value groups. In the

final column, you can see how the Item Add component would use the template list ID to efficiently add a new item in the aerosol can group.

Example of Configurable Item Templates
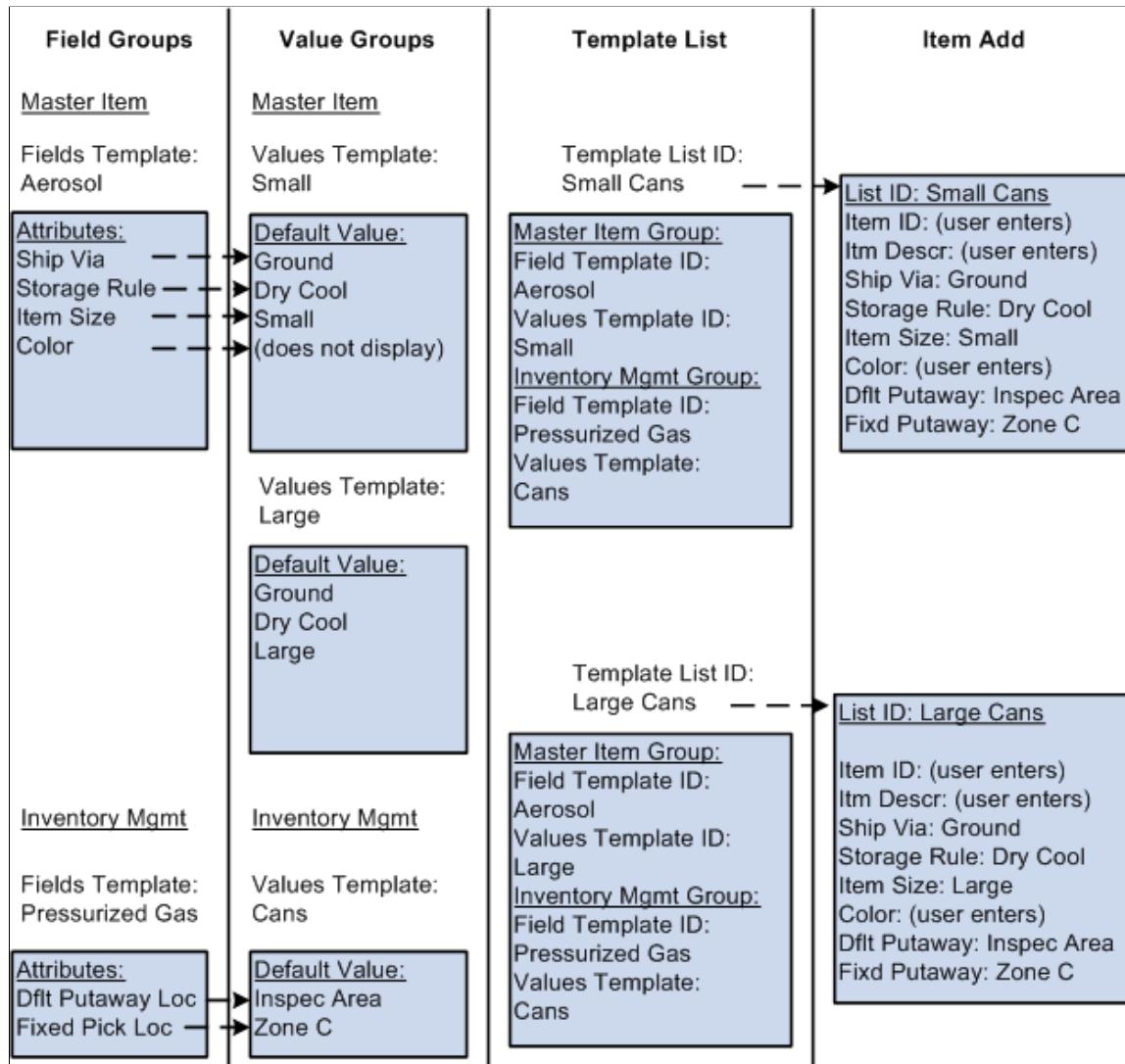
The setup steps are:

1. Define the field group templates. Field group templates are used to define the item attributes that are important to the order-entry of a new aerosol can. Item template field groups are divided into categories, in this case, master item and inventory management.

    *   The item master field group enables us to define the fields important for aerosol cans including shipping method (Ship Via), storage rule, item size, and item color. The master item field group template named *Aerosol* is created with these fields defined. Of course, other fields would also be defined here to create a complete item. Notice that the **Color** field is defined in the field group template but not in the corresponding value group templates. End-users have to populate the **Color** field when the item is added but do not use a default value. This is accomplished by defining the rules for the field on the field group template as follows: **Required** check box is selected, **Modifiable** check box is selected, and **Display on Template** check box is deselected.

- The inventory management field group enables us to define how pressurized gas is handled within the warehouse. The fields for default putaway location and fixed picking location must have default values. This insures that the spray cans are placed and retrieved from the correct material storage locations within the PeopleSoft Inventory business unit. Note that the name of the inventory management field group template is *Pressurized Gas* as it applied to all pressurized gas and could be reused when defining helium containers or other types of pressurized gas.

2. Define the value group templates. Three value group templates are set up.

   a. A master item value group template named *Small* contains the default values for small aerosol cans and was built using the item master field group template named *Aerosol*.

   b. A master item value group template named *Large* contains the default values for large aerosol cans and was also built using the item master field group template named *Aerosol*. Note that the default values differ between large and small cans so there are two different value group templates that refer to the same field group template. This design efficiently uses a common field group template with different default settings. In addition, you can reduce the template setup by using the copy function to copy field group templates and value group templates.

   c. An inventory management value group template named *Cans* contains the material storage locations for the default putaway location and the fixed picking location. These are the areas of the warehouse where pressurized gas is stored. This value group template was built using the field group template named *Pressurized Gas*.

3. Define the item template lists. Two template lists are defined, one for small spray paint cans and one for large spray paint cans. Notice that different master item value group templates are used to reflect the different defaults for large versus small. Also notice that the same inventory management field group template and inventory management value group template are used for both template lists. You can reuse field group templates and value group templates for different combinations of template lists.

After setting up configurable item templates, you can add new items by entering the template list ID. Configurable item templates can be used when adding items:

- Using the Item Add component to manually add items one at a time.

- Using the Item Loader process to load a batch of new items.

In the preceding illustration, the last column demonstrates how the Item Add component can be used to add new items using the template list ID for small cans and for large cans. Notice that the SetID, item ID, and item description are entered by the user. In addition, the templates are designed so that the user must also enter the item color.

Creating Item Templates for Field Groups

The item template field groups identify the item attributes (fields) to be used and the rules for their use. Creating field group templates is the first step in using the configurable item template feature. The item template field groups exist for attributes at the SetID level and at the business unit level.

When an existing field group template appears on a field group component, the system checks to see if the base table definition has changed; that is, if fields have been added to or deleted from the table. In this

case, a message informs you which base table has changed. The system displays the **Sync** button, which gives you the option to synchronize your template with the new base table definition. This function is not required for new field group templates being created because, at the time of creation, all the fields on the base table appear.

When creating field group templates, you not only identify the item attributes (fields) to be used, but you also establish the rules for their use. On all components for field groups, the rows contain the item attributes (fields) and the columns contain the rules that can be applied to most item attributes:

This example illustrates the fields and controls on the Master Item Fields page in Add Mode (partial page). You can find definitions for the fields and controls later on this page.

Pages Used to Create Item Templates for Field Groups

Page Name	Definition Name	Usage
Change List Maintenance - Search/View Criteria Page	IN_ITM_SCH_TMPL	Configure the search criteria based on the SetID with which the Change list is defined.
Change List Maintenance - Change Value Page	IN_ITM_CHG_TMPL	Change values on multiple fields for a group of items within a SetId and/or across business units. You may also add new values to fields having multiple values for the same Item or Item/Business unit combination.
Change List Maintenance - Add Value Page	IN_ITM_ADD_TMPL	Add child records by selecting records based on Template group.
List Permission Maintenance Page	ITEM_TML_LSTSEC_MNT	Award permission based on roles or user id.
Master Item Fields Page	MASTER_ITM_TML3	Choose fields for your configurable item template from the Master Item Fields (MASTER_ITEM_TBL) record. These fields are the basic setup to add a new item. This page is required for any configurable item template.

Page Name	Definition Name	Usage
Inventory Item Fields Page	INV_ITEMS_TML3	Select fields for your configurable item template from the Inventory Item Fields (INV_ITEMS) record. These fields are inventory-related item attributes applied at the SetID level. The attributes remain consistent for the SetID/item ID combination across all inventory business units. Master Item Fields Page
Item UOM Fields Page	IN_ITM_UM_TML3	Select fields for your configurable item template from the Item UOM Fields (INV_ITEM_UOM) record. These fields define item dimensions, such as weight and volume, and the units of measure to be applied at the SetID level. Master Item Fields Page
UOM Type Fields Page	UM_TYPE_IN_TML3	Select the INV_UOM_TYPE field for your configurable item template from the Inventory Unit of Measure Type (UOM_TYPE_INV) record. This field specifies the UOM type (ordering, shipping, and stocking) for an inventory item. Master Item Fields Page
Substitute Item Fields Page	SUB_ITEM_TML3	Select fields for your configurable item template from the Substitute Item Fields (SUBSTITUTE_ITM) record. These attributes define substitute items at the SetID level. The Include In Batch check box is not available for this page because substitutes can only be entered for online pages. The Item Loader process cannot use substitutes from the configurable item template. Master Item Fields Page
Purchasing Attribute Fields Page	PO_ITM_ATR_TML3	Select fields for your configurable item template from the Purchasing Item Attributes (PURCH_ITEM_ATTR) and Purchasing Item Accounts (PUR_ITM_ATTR_CF) records. These item attributes are used to complete the basic setup and ChartField combinations to set up a purchased item within PeopleSoft Purchasing. This component is only available if you have PeopleSoft Purchasing installed in your system.

Page Name	Definition Name	Usage
Asset Attribute Fields Page	PO_ITM_AST_TML3	Select fields for your configurable item template from the Asset Item Attributes (ASSET_ITEM_ATTR) record. These item attributes are used within PeopleSoft Purchasing to identify the receipt items as asset purchases. This component is only available if you have PeopleSoft Purchasing installed in your system. Purchasing Attribute Fields Page
Item Specification Fields Page	PO_ITM_SPEX_TML3	Select fields for your configurable item template from the Purchasing Item Specifications (ITEM_SPEX_PUR) record. These item attributes are used within PeopleSoft Purchasing to enter item specifications and descriptions. This component is only available if you have PeopleSoft Purchasing installed in your system. Purchasing Attribute Fields Page
PO BU Item Attribute Fields Page	PO_ITM_BU_TML3	Select fields for your configurable item template from the Purchasing BU Item Attributes (PURCH_ITEM_BU) record. These item attributes are PeopleSoft Purchasing business unit defaults applied at the SetID level. This component is only available if you have PeopleSoft Purchasing installed in your system. Purchasing Attribute Fields Page
Product Definition Fields Page	PROD_ITEM_TML3	Select fields for your configurable item template from the Product Items (PROD _ITEM) record. These item attributes are needed to define an item as a product at the SetID level for PeopleSoft Order Management and PeopleSoft Enterprise Pricer. This component is only available if you have PeopleSoft Order Management installed.

Page Name	Definition Name	Usage
Margin Amount Fields Page	PROD_ITEM_CUR_TML3	Select fields for your configurable item template from the PROD_ITEM_CURR record. These attributes are used to establish the allowable margin range for a product entered on a sales order schedule after all discounts have been applied. This component is only available if you have PeopleSoft Order Management installed. Product Definition Fields Page
Attributes By UOM Fields Page	PROD_UOM_TML3	Select fields for your configurable item template from the Product Attributes by Unit of Measure (PROD_UOM_CURR) record. These SetID-level product attributes are used to restrict the units of measure available for use in PeopleSoft Order Management, to define minimum and maximum order quantities, and to define valid order increments. This component is only available if you have PeopleSoft Order Management installed. Product Definition Fields Page
Price By UOM Fields Page	PROD_UOM_CURR_TML3	Select fields for your configurable item template from the Product Unit of Measure (PROD_UOM) record. These product attributes are used to product prices at the SetID level. This component is only available if you have PeopleSoft Order Management installed.
Manufactured Item Page	ITM_MFG_TML3	Select fields for your configurable item template from the ITEM_MFG record. These attributes are used at the SetID level to define an item for use in the PeopleSoft Manufacturing application.
UPN Attributes Page	ITM_MFG_UPNTML3	If the item has a UPN ID (universal product number ID), use this page to select fields for your configurable item template from the ITEM_MFG_UPN_FS record. These attributes are used at the SetID level to define a item with a UPN ID for use in the PeopleSoft Manufacturing application. Manufactured Item Page

Page Name	Definition Name	Usage
GPO Attributes Page	ITM_MFG_GPOTML3	If the item has GPO (group purchasing organization) data, use this page to select fields for your configurable item template from the ITEM_MFG_GPO record. These attributes are used at the SetID level to define a item with GPO information for use in the PeopleSoft Manufacturing application.
		Manufactured Item Page
Item Supplier Fields Page	ITM_VENDOR_TML3	Select fields for your configurable item template from the ITM_VENDOR record. These item attributes are used to complete the prioritized item-supplier combinations for a purchased item within PeopleSoft Purchasing.
Item Supplier Location Fields Page	ITMVND_LOC_TML3	Select fields for your configurable item template from the ITM_VENDOR_LOC record. These item attributes are used to complete the item-supplier location combinations for a purchased item within PeopleSoft Purchasing.
		Item Supplier Fields Page
Item Supplier UOM Fields Page	ITMVND_UOM_TML3	Select fields for your configurable item template from the ITM_VNDR_UOM record. These item attributes are used to establish valid units of measure (UOM) to use when ordering the item from the supplier within PeopleSoft Purchasing.
		Item Supplier Fields Page
Item Supplier UOM Price Fields Page	ITVND_UMPR_TML3	Select fields for your configurable item template from the ITM_VNDR_UOM _PR record. These item attributes are used to establish the pricing information for each valid unit of measure (UOM) when ordering the item from the supplier within PeopleSoft Purchasing.
		Item Supplier Fields Page
Return to Supplier Fees Fields Page	ITMVND_RTV_TML3	Select fields for your configurable item template from the ITM_VND_RTV_FEE record. These item attributes are used to define any fees charged by the supplier for returning a purchased item within PeopleSoft Purchasing.
		Item Supplier Fields Page

Page Name	Definition Name	Usage
Supplier Item MFG Fields Page	ITMVND_MFG_TML3	Select fields for your configurable item template from the ITM_VENDOR_MFG record. These item attributes are used to record the authorized manufacturers for an item-supplier combination of a purchased item within PeopleSoft Purchasing. Item Supplier Fields Page
Inventory Fields Page	BU_ITM_INV_TML3	Select fields for your configurable item template from the Business Unit Items (BU_ITEMS_INV) record. These fields are defined at the business unit level and are common item attributes across PeopleSoft Inventory business units.
Configuration Fields Page	BU_ITM_CFG_TML3	Select fields for your configurable item template from the Business Unit Item Configuration (BU_ITEMS_CONFIG) record. These fields are defined at the business unit level. Inventory Fields Page
Utilization Code Fields Page	BU_ITM_UTL_TML3	Select fields for your configurable item template from the Business Unit Item Utilization Codes (BU_ITEM_UTIL_CD) record. These fields are defined at the business unit level and are used for ABC utilization groupings that you want to maintain in your system. Inventory Fields Page
Weight/Volume Fields Page	BU_ITM_WTV_TML3	Select fields for your configurable item template from the Business Unit Items Weight & Volume (BU_ITEMS_WTVOL) record. These fields are defined at the business unit level. Inventory Fields Page
Planning Attribute Fields Page	PL_ITEM_ATTR_TML3	Select fields for your configurable item template from the Planning Attributes (PL_ITEM_ATTRIB) record. These fields are defined at the business unit level. Inventory Fields Page

Page Name	Definition Name	Usage
Prdn Replenishment Loc Fields Page	SF_RPL_LOC_TML3	Select fields for your configurable item templates to be used for production replenishment in PeopleSoft Manufacturing. These fields are from the SF_REPL_INV and SF_WIP_REPL _REQ records. The SP_REPL_INV record defines production replenishment locations. This is required if you use PeopleSoft Flow Production. If you use PeopleSoft Manufacturing without PeopleSoft Flow Production, you can set up production replenishment defaults if you use the replenishment component-issue method. Inventory Fields Page
Picking Zone Fields Page	PICK_ZONE_TML3	Select fields for your configurable item template from the Picking Zones (PICK _ZONE_INV) record. These fields are defined at the business unit level and are used to group storage locations into picking zones to help direct the picking operations within the PeopleSoft Inventory business unit.
Putaway Zone Fields Page	PTWY_ZONE_TML3	Select fields for your configurable item template from the Putaway Zones (PTWY_ZONE_INV) record. These fields are defined at the business unit level and are used to assign an item to a zone for inventory putaway. Picking Zone Fields Page
Fixed Picking Location Fields Page	FXD_BIN_LOC_TML3	Select fields for your configurable item template from the Fixed Picking Locations (FIXED_BIN_LOC_INV) record. These fields are defined at the business unit level and are used to assign an item to a fixed picking location. Picking Zone Fields Page
Default Putaway Loc Fields Page	DEFAULT_LOC_TML3	Select fields for your configurable item template from the Default Putaway Location (DEFAULT_LOC_INV) record. These fields are defined at the business unit level and are used to assign an item to a default putaway location. Picking Zone Fields Page

Page Name	Definition Name	Usage
Putaway Rule Fields Page	PTWY_IT_RULE_TML3	Select fields for your configurable item template from the Item Putaway Rules (PTWY_IT_RULE_IN) record. These fields are defined at the business unit level and are used to assign putaway rules for the item. Picking Zone Fields Page
Fulfillment Attribute Fields Page	SETUP_ITM_TML3	Select fields for your configurable item template from the Item Fulfillment Attributes (DF_SETUP_IT_INV) record. These fields are needed to store item demand fulfillment attributes at the business unit level.
Auto Serial Numbering Fields Page	AUTO_NUM_TML3	Select fields for your configurable item template from the Automatic Serial Number Setup for Serialized Items (AUTO_SERIAL_NUM) record. These fields are needed to define the automatic numbering sequence for serialized items. Fulfillment Attribute Fields Page

Change List Maintenance - Search/View Criteria Page

Use the Change List Maintenance - Search/View Criteria page (IN_ITM_SCH_TMPL) to configure the search criteria based on the SetID with which the Change list is defined. The page has two sections: the first sections displays Primary search criteria which includes the following fields:

- From Item ID

- To Item ID

- UOM

- Physical Nature

- Item Group

- Family

- Category ID

The second section displays the Configurable Search Criteria which allows to select fields based on the selected records.

The Change List Maintenance pages consist of Search Criteria, Change Value, and Add Value options to perform corresponding tasks. Through Change List maintenance, the user can specify a field and associated value to be modifiable or read only. User can also leave the field value blank to be entered on run control.

Navigation:

Items > **Change List Maintenance** > **Define Item Change Templates**

This example illustrates the fields and controls on the Change List Maintenance — Search/View Criteria. You can find definitions for the fields and controls later on this page.

Field or Control	Description
View Count	Allows to view count of rows returned on search execution
Modifiable	If the Modifiable checkbox is selected the user can modify(run control user can add new search criteria but cannot delete any) the search criteria in Run control. The user needs to enter a value in the search criteria in case the modifiable checkbox is not selected.

Note: The user cannot delete search criteria in Run control, which is defined in the Change List. The user cannot search on business unit for which the permission is not granted. Similarly the run control user will not be able to delete any change value or add value that is defined in the change list. The access to the change list component is mostly provided to super user only.

Change List Maintenance - Change Value Page

Use the Change List Maintenance - Change Value page (IN_ITM_CHG_TMPL) to change values on multiple fields for a group of items within a SetId and/or across business units. You may also add new values to fields having multiple values for the same Item or Item/Business unit combination.

Note: The modifications made in the Change List Page through Change Value, Add Value and Search Criteria will have the same implications in the Run Control Page.

Navigation:

Items > **Change List Maintenance** > **Change List** > **Change Value**

This example illustrates the fields and controls on the Change List Maintenance — Change Value Page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Table Name	Displays the Table name based upon selection
Select Fields (link)	Displays a modal secondary page. This page lists all the fields that can be changed on the Record. It also allows users to select or deselect multiple values. The selected values are added to the main page

Note: Whether a field is "modifiable" on Run control or not, it will be added against the field name. If the field is not "Modifiable", then the Field and Value entered becomes read-only on the corresponding Run control page.

Change List Maintenance - Add Value Page

Use the Change List Maintenance - Add Value page (IN_ITM_ADD_TMPL) to add child records by selecting records based on Template group. While adding child records the user needs to associate a Value Template ID for the selected Template group. If the selected Template group consists of multiple records, the user needs to specify the record, which needs to be updated.

Navigation:

Items > **Change List Maintenance** > **Change List** > **Add Value**

This example illustrates the fields and controls on the Change List Maintenance — Add Value Page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
View and Modify Values	Displays a modal secondary page with the Value template fields for viewing or modifying values. The read-only or editable control of the fields is controlled by the associated field template
Modifiable	The modifiable flag cannot be edited. Only the super user (the user who creates the change list) will be able to view and modify values. The run control user (that is from the run control page) will be able to view the values but not modify the same.

List Permission Maintenance Page

Use the list Permission Maintenance page (ITM_TML_LSTSEC_MNT) to award permission based on roles or user id. Note that the user cannot use role and user id at the same time.

Navigation:

Items > **Configurable Item Templates** > **Manage Template Permissions**

This example illustrates the fields and controls on the List permission Maintenance Page. You can find definitions for the fields and controls later on this page.

The Item Change process component is similar to the Change list component. The user can know if the update has happened from the report that is generated in the "Report Manager" link

This example illustrates the fields and controls on the Item Change Process. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Report Option	The report options include Error Report, Full Report, and No Report. If you run the process after selecting the Error Report from the dropdown, the IN_ITEM_CHG BI report generates an error report. Similarly, if you select the Full Report option, the BI IN_ITM_CONS report generates a full report.

Warning! Use extreme care when updating the master data tables, especially when modifying existing item data. The Item Loader process cannot be reversed.

Note: User needs to make sure that no transaction or material movement happens when the Item Change Process is Run

Common Elements Used in the Field Groups Components

Field or Control	Description
SetID	Select the SetID used to build the configurable item template.
Fields Template	Enter the name of the fields group template.

Field or Control	Description
Include in Group	Deselect this check box to remove all item attributes on this page from this field group template. For example, if you do not use item substitutes then you do not need the fields located in the Substitute Item Field tab on the **Master Item** field group. This check box is disabled and cannot be used for critical field groups such as the Master Item Fields page.
Include in Batch	Deselect this check box to remove all item attributes on this page from the batch run of the Item Loader process. Some segments are not applicable to the batch mode and this check box enables you to prevent these segments from being loaded.
Copy From Template	Select an existing field group template to be copied into your new field group template. This field is only available when adding a new template.
Copy Fields	Click this button to copy the fields and their check box settings from the template named in the **Copy From Template** field. This button is only available when adding a new template.
Required	Select this check box to require an entry by the user or system when adding the new item. These fields can be key fields as defined on the table definition or user-defined here (within the field group component). Rows with a required field, either user-defined or table-defined, automatically have the **Displayed on Template** check box selected. Note: Special rules exist for these fields; **SetID, Item ID,** and **Description (DESCR60).** These three fields are required but do not appear on value group templates. The field values are obtained during data entry of the new item.
Modifiable	Select this check box to enable this item attribute to be changed by the user when the item is entered on the Item Add component.
Displayed on Template	Select this check box to make the item attribute visible on the value group templates where you can enter a default value. These fields may or may not be modifiable.
Use Current Date/Time	For item attributes that are date/time fields, select this check box to populate the field with the current date and time when creating the value group template. The value cannot be changed within the value group template, but it can be changed when adding a new item in the Item Add component.

Master Item Fields Page

Use the Master Item Fields page (MASTER_ITM_TML3) to choose fields for your configurable item template from the Master Item Fields (MASTER_ITEM_TBL) record.

These fields are the basic setup to add a new item. This page is required for any configurable item template.

Navigation:

Items > **Configurable Item Templates** > **Field Groups** > **SetID Level** > **Item Attributes File by Group**

This example illustrates the fields and controls on the Master Item Fields page within the Master Item Field Group. You can find definitions for the fields and controls later on this page.

The Master Item Fields page is the first page in the Master Item component.

The Field Group for Master Items

The Master Item component displays the fields within the **Master Item** field group. This field group gathers together the PeopleSoft records (tables) that are needed to add an item at the SetID level. The first page on this component is required for all configurable item templates.

Each page in this component contains fields keyed by SetID within the following PeopleSoft tables:

Page Name	Table Name
Master Item Fields	MASTER_ITEM_TBL
Classification 2	GS1_CLS2_INV_IT
Inventory Item Fields	INV_ITEMS

Page Name	Table Name
Item UOM Fields	INV_ITEM_UOM
UOM Type Fields	UOM_TYPE_INV
Substitute Item Fields	SUBSTITUTE_ITM

Note: The Include In Batch check box is not available for this page because substitutes can only be entered for online pages. The Item Loader process cannot use substitutes from the configurable item template.

Purchasing Attribute Fields Page

Use the Purchasing Attribute Fields page (PO_ITM_ATR_TML3) to select fields for your configurable item template from the Purchasing Item Attributes (PURCH_ITEM_ATTR) and Purchasing Item Accounts (PUR_ITM_ATTR_CF) records.

These item attributes are used to complete the basic setup and ChartField combinations to set up a purchased item within PeopleSoft Purchasing. This component is only available if you have PeopleSoft Purchasing installed in your system.

Navigation:

Items > **Configurable Item Templates** > **Field Groups** > **SetID Level** > **PO Item Attribute Details**

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This example illustrates the fields and controls on the Purchasing Attribute Fields page within the Purchasing Item Attributes Field Group. You can find definitions for the fields and controls later on this page.

Item Template Fields					
Field Name	Required	Modifiable	Displayed on Template	Use Current Date/Time	Description
ACCEPT_ALL_SHIPTO	☑	☐	☑	☐	Accept Any Ship To
ACCEPT_ALL_VENDOR	☑	☐	☑	☐	Accept Any Supplier
ACCOUNT	☑	☐	☑	☐	Account
ALTACCT	☐	☐	☐	☐	Alternate Account
AUTO_SOURCE	☐	☐	☐	☐	Auto Select
AVAIL_ALL_RGNS	☑	☐	☑	☐	Available in All Regions
CONTRACT_REQ	☑	☐	☑	☐	Contract Required
CURRENCY_CD	☑	☐	☑	☐	Currency Code
DESCR	☐	☐	☐	☐	Description
DESCR254_MIXED	☐	☐	☐	☐	Description
DESCRSHORT	☐	☐	☐	☐	Short Description
EXT_PRC_TOL	☐	☐	☐	☐	Ext Price Tolerance
EXT_PRC_TOL_L	☐	☐	☐	☐	Ext Price Tolerance - Under
FILENAME	☐	☐	☐	☐	File Name
FILE_EXTENSION	☐	☐	☐	☐	File Extension

SetID SHARE   Fields Template FAST_PURCH   ☑ Include In Group   ☑ Include In Batch   Synch

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The Purchasing Attribute Fields page is the first page in the Purchasing Item Attributes component.

The Field Group for Purchasing Item Attributes

The Purchasing Item Attributes component displays the fields within the **Purchasing Item Attributes** field group. This field group gathers together the PeopleSoft records (tables) that are needed to add a purchased item at the SetID level. The **Purchasing Item Attributes** field group is only available if you have PeopleSoft Purchasing installed.

Each page in this component contains fields keyed by SetID within the following PeopleSoft tables:

Page Name	Table Name
Purchasing Attribute Fields	PURCH_ITEM_ATTR and PUR_ITM_ATTR_CF
Asset Attribute Fields	ASSET_ITEM_ATTR
Item Specification Fields	ITEM_SPEX_PUR
PO BU Item Attribute Fields	PURCH_ITEM_BU

Product Definition Fields Page

Use the Product Definition Fields page (PROD_ITEM_TML3) to select fields for your configurable item template from the Product Items (PROD_ITEM) record.

These item attributes are needed to define an item as a product at the SetID level for PeopleSoft Order Management and PeopleSoft Enterprise Pricer. This component is only available if you have PeopleSoft Order Management installed.

Navigation:

Items > Configurable Item Templates > Field Groups > SetID Level > Product Item Attributes

This example illustrates the fields and controls on the Product Definition Fields page within the Product Item Attributes Field Group. You can find definitions for the fields and controls later on this page.

The Product Definition Fields page is the first page in the Product Item Attributes component.

The Field Group for Product Item Attributes

The Product Item Attributes component displays the fields within the **Product Item Attributes** field group. This field group gathers together the PeopleSoft records (tables) that are needed to define an item as a product at the SetID level for PeopleSoft Order Management and PeopleSoft Enterprise Pricer. The **Product Item Attributes** field group is only available if you have PeopleSoft Order Management installed.

Each page in this component contains fields keyed by SetID within the following PeopleSoft tables:

Page Name	Table Name
Product Definition Fields	PROD_ITEM
Margin Amount Fields	PROD_ITEM_CURR
Product by UOM Fields	PROD_UOM

Page Name	Table Name
Attributes by UOM Fields	PROD_UOM_CURR

Manufactured Item Page

Use the Manufactured Item page (ITM_MFG_TML3) to select fields for your configurable item template from the ITEM_MFG record.

These attributes are used at the SetID level to define an item for use in the PeopleSoft Manufacturing application.

Navigation:

Items > **Configurable Item Templates** > **Field Groups** > **SetID Level** > **Mfg Item Attributes**

This example illustrates the fields and controls on the Manufactured Item page . You can find definitions for the fields and controls later on this page.

The Manufactured Item page is the first page in the Manufacturer's Item Attributes component.

The Field Group for Manufacturer's Item Attributes

The Manufacturer's Item Attributes component displays the fields within the **Manufacturer's Item Attributes** field group. This field group gathers together the PeopleSoft records (tables) that are needed to define a manufactured item at the SetID level for PeopleSoft Manufacturing.

Each page in this component contains fields keyed by SetID within the following PeopleSoft tables:

Page Name	Table Name
Manufactured Item	ITEM_MFG
UPN Attributes	ITEM_MFG_UPN_FS
UPN Attributes 2	GS1_UPN_ATT2
GPO Attributes	ITEM_MFG_GPO

Item Supplier Fields Page

Use the Item Supplier Fields page (ITM_VENDOR_TML3) to select fields for your configurable item template from the ITM_VENDOR record.

These item attributes are used to complete the prioritized item-supplier combinations for a purchased item within PeopleSoft Purchasing.

Navigation:

Items > **Configurable Item Templates** > **Field Groups** > **SetID Level** > **Item Supplier Attributes**

The Item Supplier Fields page is the first page in the Item Supplier Attributes component.

The Field Group for Item Supplier Attributes

The Item Supplier Attributes component displays the fields within the **Item Supplier Attributes** field group. This field group gathers together the PeopleSoft records (tables) that are needed to define, at the SetID level, supplier information for a purchased item. The **Item Supplier Attributes** field group is only available if you have PeopleSoft Purchasing installed.

Each page in this component contains fields keyed by SetID within the following PeopleSoft tables:

Page Name	Table Name
Item Supplier Fields	ITM_VENDOR
Item Supplier Location Fields	ITM_VENDOR_LOC
Item Supplier UOM Fields	ITM_VNDR_UOM
Item Supplier UOM Price Fields	ITM_VNDR_UOM_PR
Return to Vendor Fees Fields	ITM_VND_RTV_FEE
Supplier Item MFG Fields	ITM_VENDOR_MFG

Inventory Fields Page

Use the Inventory Fields page (BU_ITM_INV_TML3) to select fields for your configurable item template from the Business Unit Items (BU_ITEMS_INV) record.

These fields are defined at the business unit level and are common item attributes across PeopleSoft Inventory business units.

Navigation:

Items > **Configurable Item Templates** > **Field Groups** > **Business Unit Level** > **Define BU and Item Attributes**

This example illustrates the fields and controls on the Inventory Fields page within the Business Unit Item Field Group. You can find definitions for the fields and controls later on this page.

Inventory Fields	Configuration Fields	Utilization Code Fields	Weight/Volume Fields	▶

SetID SHARE   Fields Template SPRAYCANS   ☑ Include In Group   ☑ Include In Batch
Copy From Template [ ] 🔍   Copy Fields

Item Template Fields   Personalize | Find | View 100 | 🗗 | 🖩   First ① 1-15 of 109 ① Last

Field Name	Required	Modifiable	Displayed on Template	Use Current Date/Time	Description
ITM_STATUS_CURRENT	☑	☐	☑	☐	Item Status Current
ITM_STAT_DT_FUTURE	☐	☐	☐	☐	Item Date Future
ITM_STATUS_FUTURE	☐	☐	☐	☐	Item Status Future
LAST_ANNUAL_DEMAND	☐	☐	☐	☐	Last Ann. Demand
REPLENISH_CLASS	☐	☐	☐	☐	Replenish Class
REPL_CALC_PERIOD	☐	☐	☐	☐	Replenish Calc Period (Days)
REPLENISH_LEAD	☐	☐	☐	☐	Replenish Lead (Days)
SAFETY_STOCK	☐	☐	☐	☐	Safety Stock
STOCKOUT_RATE	☐	☐	☐	☐	Desired Stock-In Probability
REORDER_POINT	☐	☐	☐	☐	Reorder Point
REORDER_QTY	☐	☐	☐	☐	Reorder Qty
QTY_IUT_PAR	☐	☐	☐	☐	InterUnit Par Qty

The Inventory Fields page is the first page of the Business Unit Item component.

When inserting a row into the replenishment locations, the system only inserts these locations into business units where the material storage locations are defined. If the material storage location is not defined in one or more of the business units, then the locations are not created for that business unit.

The Field Group for Inventory Business Unit and Item ID Attributes

The Business Unit Item component displays fields within the **Business Unit Item** field group. This field group gathers together the PeopleSoft records (tables) that are needed to define attributes of an item ID within a PeopleSoft Inventory business unit. These fields are defined at the business unit level and are common item attributes across Inventory business units.

Each page in this component contains fields keyed by business unit within the following PeopleSoft tables:

Page Name	Table Name
Inventory Fields	BU_ITEMS_INV
Configuration Fields	BU_ITEMS_CONFIG
Utilization Code Fields	BU_ITEM_UTIL_CD
Weight/Volume Fields	BU_ITEMS_WTVOL

Page Name	Table Name
Planning Attribute Fields	BU_ITEMS_INV PL_ITEM_ATTRIB
Prdn Replenishment Loc Fields	SF_REPL_INV and SF_WIP_REPL_REQ

Picking Zone Fields Page

Use the Picking Zone Fields page (PICK_ZONE_TML3) to select fields for your configurable item template from the Picking Zones (PICK_ZONE_INV) record.

These fields are defined at the business unit level and are used to group storage locations into picking zones to help direct the picking operations within the PeopleSoft Inventory business unit.

Navigation:

Items > **Configurable Item Templates** > **Field Groups** > **Business Unit Level** > **Item Template Attribute Groups**

This example illustrates the fields and controls on the Picking Zone Fields page within the Inventory Management Field Group. You can find definitions for the fields and controls later on this page.

The Picking Zone Fields page is the first page in the Inventory Management component.

When inserting a row into putaway zones, fixed picking locations, or default putaway locations, the system only inserts these locations into business units where the material storage locations are defined. If the material storage location is not defined in one or more of the business units, then the locations are not created for that business unit.

The Field Group for Inventory Management

The Inventory Management component displays the fields within the **Inventory Management** field group. This field group gathers together the PeopleSoft records (tables) that are needed to store stock within a PeopleSoft Inventory business unit and manage day-to-day warehouse operations.

Each page in this component contains fields keyed by business unit within the following PeopleSoft tables:

Page Name	Table Name
Picking Zone Fields	PICK_ZONE_INV
Putaway Zone Fields	PTWY_ZONE_INV
Fixed Picking Location Fields	FIXED_BIN_LOC_INV
Default Putaway Loc Fields	DEFAULT_LOC_INV
Putaway Rule Fields	PTWY_IT_RULE_IN

Fulfillment Attribute Fields Page

Use the Fulfillment Attribute Fields page (SETUP_ITM_TML3) to select fields for your configurable item template from the Item Fulfillment Attributes (DF_SETUP_IT_INV) record.

These fields are needed to store item demand fulfillment attributes at the business unit level.

Navigation:

Items > Configurable Item Templates > Field Groups > Business Unit Level > Define Fulfillment Attributes

This example illustrates the fields and controls on the Fulfillment Attribute Fields page within the Inventory Fulfillment Field Group. You can find definitions for the fields and controls later on this page.

The Fulfillment Attribute Fields page is the first page in the Inventory Fulfillment component.

The Field Group for Inventory Fulfillment

The Inventory Fulfillment component displays the fields within the **Inventory Fulfillment** field group. This field group gathers together the PeopleSoft records (tables) that are needed to store item demand fulfillment attributes at the business unit level.

Each page in this component contains fields keyed by business unit within the following PeopleSoft tables:

Page Name	Table Name
Fulfillment Attribute Fields	DF_SETUP_IT_INV
Automatic Serial Numbering Fields	AUTO_SERIAL_NUM

Defining Item Templates for Value Groups

The second step in setting up configurable item templates is to create value group templates. Value groups assign default values for the item attributes chosen in your field group templates. The item attributes available on the value group template are the fields where you selected the **Display on Template** check box on the field group template.

When an existing value group template appears on a value group component, the system checks to see if the value group template still matches the corresponding field group template and the base tables. If fields have been added to or deleted from the item tables since the creation of the value group template, then the template can be out of synchronization with the base tables and even the field group template. In this case, you need to adjust your value group template.

Note: Special rules exist for the fields; SetID, Item ID, and Description (DESCR60). These three fields are required, but are not modifiable or displayed on the template groups. The field values are obtained during data-entry of the new item.

Each page within the value group components has the same fields in the header section.

The Master Item Values page in Add Mode (partial page shot)

Pages Used to Define Item Templates for Value Groups

Page Name	Definition Name	Usage
Master Item Values Page	MASTER_ITM_TML4	Enter default values for the fields selected on the Master Item Fields page.
Inventory Item Values Page	INV_ITEMS_TML4	Enter default values for the fields selected on the Inventory Item Fields page.
Item UOM Values Page	IN_ITMUM_TML4	Enter default values for the fields selected on the Item UOM Fields page and the UOM Type Fields page.
Substitute Item Values Page	SUB_ITEM_TML4	Enter default values for the fields selected on the Substitute Item Fields page. Substitutes entered on the Substitute Item Values page can only be used for online pages. The Item Loader process cannot use substitutes from the configurable item template.
Purchasing Attribute Values Page	PO_ITM_ATR_TML4	Enter default values for the fields selected on the following field group pages; Purchasing Attribute Fields, Asset Attribute Fields, and Item Specification Fields.
PO BU Item Attribute Values Page	PO_ITM_BU_TML4	Enter default values for the fields selected on the PO BU Item Attribute Fields page.
Product Item Attributes Page	PROD_ITEM_TML4	Enter default values for the fields selected on the following field group pages; Product Definition Fields, Margin Amount Fields, Attributes By UOM Fields, and Price By UOM Fields.
Manufacturer's Item Attributes Page	ITEM_MFG_TML4	Enter default values for the fields selected on the following field group pages; Manufactured Item, UPN Attributes, and GPO Attributes.
Item Supplier Values Page	ITM_VENDOR_TML4	Enter default values for the fields selected on the following field group pages; Item Supplier Fields, Item Supplier Location Fields, Return to Vendor Fees Fields, and Supplier Item MFG Fields.

Page Name	Definition Name	Usage
Item Supplier UOM Values Page	ITMVND_UOM_TML4	Enter default values for the fields selected on the following field group pages; Item Supplier UOM Fields and Item Supplier UOM Price Fields.
Inventory Values Page	BU_ITM_INV_TML4	Enter default values for the fields selected on the Inventory Fields page.
Configuration Values Page	BU_ITM_CFG_TML4	Enter default values for the fields selected on the Configuration Fields page.
Utilization Code Values Page	BU_ITM_UTL_TML4	Enter default values for the fields selected on the Utilization Code Fields page.
Weight Volume Values Page	BU_ITM_WTV_TML4	Enter default values for the fields selected on the Weight/Volume Fields page.
Replenishment Attr Values Page	BU_ITM_RPLN_TML4	Enter default values for the inventory replenishment attributes defined at the item ID/inventory business unit combination. These fields are defined only at the business unit level. See the Define Business Unit Item - Inventory: Replenishment page for field definitions.
Planning Attribute Values Page	BU_ITM_PLN_TML4	Enter default values for the fields selected on the Planning Attribute Fields page.
Manufacturing Attr Values Page	BU_ITM_MFG_TML4	Enter default values for the fields selected on the Prdn Replenishment Loc Fields page. Define production control options and production replenishment locations in PeopleSoft Manufacturing.
Zone Assignment Values Page	BU_ITM_ZONE_TML4	Enter default values for the fields selected on the Picking Zone Fields page and the Putaway Zone Fields page.
Fixed Picking Location Values Page	BU_ITM_FXDBIN_TML4	Enter default values for the fields selected on the Fixed Picking Location Fields page.
Default Putaway Loc Values Page	BUITM_DFLTLOC_TML4	Enter default values for the fields selected on the Default Putaway Loc Fields page.

Page Name	Definition Name	Usage
Putaway Rule Values Page	BUIT_PTWYRULE_TML4	Enter default values for the fields selected on the Putaway Rule Fields page.
<u>Fulfillment Attribute Values Page</u>	SETUP_ITM_TML4	Enter default values for the fields selected on the Fulfillment Attribute Fields page.
Auto Serial Numbering Values Page	AUTO_NUM_TML4	Enter default values for the fields selected on the Auto Serial Numbering Fields page.

Common Elements Used in the Value Groups Components

Field or Control	Description
SetID	Select the SetID used to build the configurable item template.
Fields Template ID	Select the name of the field group template that you want to use to build the value group template.
Values Template ID	Enter the name of your value group template.
Copy From Template	Select an existing value group template to be copied into your new value group template. This field is only available when adding a new template.
Copy Fields	Click this button to copy the fields from the template named in the Copy From Template field. This button is only available when adding a new template.
Description	Enter a description of your value group template.

Master Item Values Page

Use the Master Item Values page (MASTER_ITM_TML4) to enter default values for the fields selected on the Master Item Fields page.

Navigation:

Items > **Configurable Item Templates** > **Value Groups** > **SetID Level** > **Item File Default Values**

This example illustrates the fields and controls on the Master Items Values page within the Master Item Value Group. You can find definitions for the fields and controls later on this page.

Enter default values for the fields selected on the Master Item fields group.

The Master Item template group includes basic item setup attributes, item codes, unit of measure setup, and substitute item information.

Substitutes entered on the Substitute Item Values page can only be used for online pages. The Item Loader process cannot use substitutes from the configurable item template.

For more information about the fields within the header of this component, see the "Common Elements Used in the Value Groups Components" section of this topic.

See Common Elements Used in the Value Groups Components.

For more information on the fields available within this template group, see the "Creating Item Templates for Field Groups" section of this topic.

See Creating Item Templates for Field Groups.

Purchasing Attribute Values Page

Use the Purchasing Attribute Values page (PO_ITM_ATR_TML4) to enter default values for the fields selected on the following field group pages; Purchasing Attribute Fields, Asset Attribute Fields, and Item Specification Fields.

Navigation:

Items > **Configurable Item Templates** > **Value Groups** > **SetID Level** > **PO Item Attribute Defaults**

This example illustrates the fields and controls on the The Purchasing Attribute Values page within the Purchasing Item Attributes Value Group (partial). You can find definitions for the fields and controls later on this page.

Enter default values for the fields selected on the **Purchasing Item Attributes** field group.

The Purchasing Item Attributes template group contains attributes needed to set up a purchased item within PeopleSoft Purchasing. The purchasing item attributes group includes basic purchasing item setup, ChartField definitions, asset information, and item specifications.

For more information about the fields within the header of this component, see the "Common Elements Used in the Value Groups Components" section of this topic.

See Common Elements Used in the Value Groups Components.

For more information about the fields available within this template group, see the "Creating Item Templates for Field Groups" section of this topic.

See Creating Item Templates for Field Groups.

Product Item Attributes Page

Use the Product Item Attributes page (PROD_ITEM_TML4) to enter default values for the fields selected on the following field group pages; Product Definition Fields, Margin Amount Fields, Attributes By UOM Fields, and Price By UOM Fields.

Navigation:

Items > **Configurable Item Templates** > **Value Groups** > **SetID Level** > **Product Item Attribute Dflts**

This example illustrates the fields and controls on the Product Item Attribute Values page within the Product Item Attributes Value Group (partial). You can find definitions for the fields and controls later on this page.

Enter default values for the fields selected on the **Product Item Attributes** field group.

The Product Item Attributes template group contains attributes needed to define items as products within PeopleSoft Order Management and Enterprise Pricer. The product item attributes group includes basic product setup, attributes by unit of measure, and product margin data.

For more information about the fields within the header of this component, see the "Common Elements Used in the Value Groups Components" section of this topic.

See Common Elements Used in the Value Groups Components.

For more information about the fields available within this template group, see the "Creating Item Templates for Field Groups" section of this topic.

See Creating Item Templates for Field Groups.

Manufacturer's Item Attributes Page

Use the Manufacturer's Item Attributes page (ITEM_MFG_TML4) to enter default values for the fields selected on the following field group pages; Manufactured Item, UPN Attributes, and GPO Attributes.

Navigation:

Items > **Configurable Item Templates** > **Value Groups** > **SetID Level** > **Mfg Item Attribute Defaults**

This example illustrates the fields and controls on the Manufacturer's Item Attributes page. You can find definitions for the fields and controls later on this page.

Enter default values for the fields selected on the **Manufacturer's Item Attributes** field group.

The Manufacturer's Item Attributes template group contains attributes needed to define manufactured items within PeopleSoft Manufacturing.

For more information about the fields within the header of this component, see the "Common Elements Used in the Value Groups Components" section of this topic.

See Common Elements Used in the Value Groups Components.

For more information about the fields available within this template group, see the "Creating Item Templates for Field Groups" section of this topic.

See Creating Item Templates for Field Groups.

Item Supplier Values Page

Use the Item Supplier Values page (ITM_VENDOR_TML4) to enter default values for the fields selected on the following field group pages; Item Supplier Fields, Item Supplier Location Fields, Return to Vendor Fees Fields, and Supplier Item MFG Fields.

Navigation:

Items > Configurable Item Templates > Value Groups > SetID Level > Item Supplr Attribute Defaults

Enter default values for the fields selected on the **Item Supplier Attributes** field group.

The Item Supplier Attributes template group contains attributes needed to set up the item-supplier combinations for a purchased item within PeopleSoft Purchasing. The item supplier attributes group includes the prioritized item-supplier combinations, vendor locations, acceptable units of measure, prices, return to vendor fees, and authorized manufacturers.

Field or Control	*Description*
Item Supplier UOM	Click this link to access the Item Supplier UOM Values page where you can enter the default values for the fields selected on the following field group pages; Item Supplier UOM Fields and Item Supplier UOM Price Fields.

For more information about the fields within the header of this component, see the "Common Elements Used in the Value Groups Components" section of this topic.

See Common Elements Used in the Value Groups Components.

For more information about the fields available within this template group, see the "Creating Item Templates for Field Groups" section of this topic.

See Creating Item Templates for Field Groups.

Inventory Values Page

Use the Inventory Values page (BU_ITM_INV_TML4) to enter default values for the fields selected on the Inventory Fields page.

Navigation:

Items > Configurable Item Templates > Value Groups > Business Unit Level > Set Defaults for BU and Items

This example illustrates the fields and controls on the The Inventory Values page within the Business Unit Item Value Group. You can find definitions for the fields and controls later on this page.

Enter default values for the fields selected on the **Business Unit Item** field group.

The Business Unit Item template group contains attributes needed to define an item within a PeopleSoft Inventory business unit. The business unit item group includes attributes for basic item business unit setup, cost elements, configuration data, item dimensions, utilization codes, and planning attributes.

For more information about the fields within the header of this component, see the "Common Elements Used in the Value Groups Components" section of this topic.

See Common Elements Used in the Value Groups Components.

For more information about the fields available within this template group, see the "Creating Item Templates for Field Groups" section of this topic.

See Creating Item Templates for Field Groups.

Field or Control	Description
Cost Profile	Enter only one cost profile. This value is used when adding the item. If different values are needed for different cost books, then the changes should be made on the Define Business Unit Item - General: Costing page.
Business Unit	Enter one or more PeopleSoft Inventory business units that the item should be added to when using this values template. At lease one business unit is required.

Zone Assignment Values Page

Use the Zone Assignment Values page (BU_ITM_ZONE_TML4) to enter default values for the fields selected on the Picking Zone Fields page and the Putaway Zone Fields page.

Navigation:

Items > Configurable Item Templates > Value Groups > Business Unit Level > Item Tmplt Default Attributes

This example illustrates the fields and controls on the The Zone Assignment Values page within the Inventory Management Value Group. You can find definitions for the fields and controls later on this page.

Enter default values for the fields selected on the **Inventory Management** field group.

The Inventory Management template group contains attributes needed to run the day-to-day management of an inventory location, such as a warehouse. These attributes are defined at the PeopleSoft Inventory business unit and include picking zones, putaway zones, fixed picking locations, default putaway locations, and putaway rules.

For more information about the fields within the header of this component, see the "Common Elements Used in the Value Groups Components" section of this topic.

See Common Elements Used in the Value Groups Components.

For more information about the fields available within this template group, see the "Creating Item Templates for Field Groups" section of this topic.

See Creating Item Templates for Field Groups.

Fulfillment Attribute Values Page

Use the Fulfillment Attribute Values page (SETUP_ITM_TML4) to enter default values for the fields selected on the Fulfillment Attribute Fields page.

Navigation:

Items > Configurable Item Templates > Value Groups > Business Unit Level > Fulfillment Attribute Defaults

This example illustrates the fields and controls on the The Fulfillment Attribute Values page within the Inventory Fulfillment Value Group. You can find definitions for the fields and controls later on this page.

Enter default values for the fields selected on the **Inventory Fulfillment** field group.

The Inventory Fulfillment template group contains attributes needed to complete order fulfillment within a PeopleSoft Inventory business unit. These attributes include fulfillment setup fields and automatic serial numbering setup.

For more information about the fields within the header of this component, see the "Common Elements Used in the Value Groups Components" section of this topic.

See Common Elements Used in the Value Groups Components.

For more information about the fields available within this template group, see the "Creating Item Templates for Field Groups" section of this topic.

See Creating Item Templates for Field Groups.

Creating Item Template Lists

The third and last step in setting up configurable item templates is to define your template lists using the List Maintenance component. By combining different field group templates and value group templates into a template list, you can create a structure (configurable template) for adding a particular type of item. For example, you can have one template list for adding large spray paint cans and another template list for adding small spray paint cans. Each template list would contain the fields necessary to add this type of item, the rules for each field, and the default values to be used. Template lists enable the user or program to quickly and efficiently add new items by populating multiple item tables at once, across several different components.

Each template list is uniquely identified by a SetID and item template list ID combination. The List Maintenance component includes two pages:

- The Item Template Group List page defines a template list by combining field group templates with value group templates. Additional settings on this page enable the template list to be used by the Item Loader process.

- The Item Template Permission page applies security to this component and the Item Add component so that templates are only used by authorized personnel.

Page Used to Create the Item Template List

Page Name	*Definition Name*	*Usage*
Item Template Group List Page	ITM_TML_LST	Create configurable template lists by combining field group templates and value group templates.
Item Template Permission Page	ITM_TML_LST_SEC	Identify the user IDs and user roles who can maintain the configurable template list displayed in this component and use this list to add items using the Item Add component.
List Permission Maintenance Page	ITM_TML_LSTSEC_MNT	Define security access to one or more existing template lists by identifying the user IDs and user roles who can maintain the template list or use the list to add items using the Item Add component. This page is designed for an advanced user who would maintain security for many different template lists. Most users should not have access to this page. This page uses the same fields as the Item Template Permission page.

Item Template Group List Page

Use the Item Template Group List page (ITM_TML_LST) to create configurable template lists by combining field group templates and value group templates.

Navigation:

Items > **Configurable Item Templates** > **Manage Item Tmplt Group Lists**

This example illustrates the fields and controls on the Item Template Group List page. You can find definitions for the fields and controls later on this page.

Use the Item Template Group List page to build your template list IDs. Each template list is a combination of field group templates and value group templates that together define the fields, rules, and default values to add a particular type of item.

Field or Control	Description
Effective Date	Enter the date that this template list should become active.
Description	Enter a description of the template list, for example, the type of item to use this template list ID.
Copy SetID Sub Items to BU (copy SetID sub items to business unit)	Select this check box to add substitute items from the SetID Level to each business unit added. Substitutes can only be used for online pages. The Item Loader process cannot use substitutes from the configurable item template.
Add Existing Items to New BU (add existing items to new business unit)	Select this check box to use this template list to add items to new business units when the items already exist at the SetID level. In this case, the template list would only use the business unit level template groups.
Allow in Batch	Select this check box to enable the template list ID to be used by the Item Loader process; for example, when loading items using the Item_Sync EIP or the IN_MST_ITM_XLS component interface.
Item Loader Value Override	Select to enable the default values on this template list to override default values entered on the Item Loader process page. The Item Loader default values are only overridden if a corresponding default value is entered on the template.

Field or Control	Description
Validate	Click the **Validate** button to select all fields within this template list that require default values when using the Item Loader process. If the value group templates do not contain default values for these fields, then an error message appears with the field names.
Template Group	Select the template groups to be used on this template. By row, the value entered in this field determines the available options in the next two columns (Item Fields Template ID and Item Values Template ID). The system requires that you add the *Master Item Group* template group if you are adding any other SetID-level template groups. In addition, the system also requires that you add the *Business Unit Item Group* template group if you are adding any other business unit level template groups.
Item Fields Template ID	Enter the field group template to be used.
Item Values Template ID	Enter the value group template to be used.
Description	Displays the template description from the value group.
View & Modify Values	Click this link to access the template ID for the value group template listed in this row. On the value group template, you can review the default values and change the fields that were defined as modifiable on the corresponding field group template. If you have multiple default values for one field, for example, business unit on the Master Items Value page, then you can change the existing default values but you cannot insert new rows or delete rows.
Add Item	Click this link to go to the Item Add-Master Item page, where you can use this template list ID to manually add new items.

Item Template Permission Page

Use the Item Template Permission page (ITM_TML_LST_SEC) to identify the user IDs and user roles who can maintain the configurable template list displayed in this component and use this list to add items using the Item Add component.

Navigation:

Items > **Configurable Item Templates** > **List Maintenance** > **Item Template Permission**

This example illustrates the fields and controls on the Item Template Permission page. You can find definitions for the fields and controls later on this page.

The Item Template Permission page applies security to this component and the Item Add component so that templates are only used by authorized personnel. Use the Item Template Permission page to identify the users or user roles who can:

• Alter the configurable template list.

• Use the configurable template list to add an item using the Item Add component.

For one individual row identify the security privileges of one user role or one user ID, but not both. For each row, you must select at least one of the check boxes; Maintain List or Add Item.

Field or Control	Description
Role Name	Enter a user role authorized for this item template list.
User ID	Enter a user ID authorized for this item template list.
Maintain List	Select this check box to enable the user role or user to change this item template list ID. Template lists are added or changed using this component, the List Maintenance component. If a user does not have Maintain List authority for a particular item template list, then the user cannot access the list using the List Maintenance component.
Add Item	Select this check box to enable the user role or user to use this list to add items using the Item Add component. The Item Add component can be accessed using the PeopleSoft menu or by using the Add Item link on the Item Template Group List page of this component.
Change Item	(for future use)

Adding Items Using the Item Add Component

The Item Add component enables a user to quickly and efficiently add new items to the PeopleSoft item tables and minimizes input error.

When the Item Add component is saved, the new item is:

- Added to the item tables of the PeopleSoft system production records. This component adds the new item directly to the production tables, not the staging tables.

- Added to the outbound staging tables if the outbound ITEM_SYNC service operation has been activated. This outbound EIP sends incremental updates to a third-party system as item information is saved on the Item Add component.

The advantage to this component is that the user does not need to have visibility into the setup pages of the configurable item template. The **Item Template List ID** field controls the fields available for entry and applies default values to the item attributes. At a minimum, the user would have to enter the item ID and item description to create a new item. All other necessary item attributes can come from the configurable item template; however, the user has the ability to change the modifiable fields. Using the Item Add component, a user can add an item to both the SetID level item tables and the business unit level item tables.

When using configurable item templates, the new item must pass all required edits within the item tables in order to be added to the system. Also, additional edits are used to verify that the template list contains all necessary template groups; for example, before the Product Item Attributes template group can be used, the Master Item template group must exist. If any errors occur, the item is not added and an informational error page appears. If the item approval feature is enabled, then item approval is required before the item can be used.

Use the Item Add - Inventory Management page (IT_MM_ALLMODS_TML4) to add item by reviewing or adding attributes for inventory management.

Navigation:

Items > **Configurable Item Templates** > **Item Add** > **Inventory Management**

Use the Item Add - Inventory Fulfillment page (IT_FF_ALLMODS_TML4) to add item by reviewing or adding attributes for inventory fulfillment.

Navigation:

Items > **Configurable Item Templates** > **Item Add** > **Inventory Fulfillment**

Use the Item Add - Purchasing Item Attributes page (IT_PO_ALLMODS_TML4) to add item by reviewing or adding attributes to use the item in PeopleSoft Purchasing.

Navigation:

Items > **Configurable Item Templates** > **Item Add** > **Purchasing Item Attributes**

Use the Item Add - Product Item Attributes page (PRDIT_ALLMODS_TML4) to add item by reviewing or adding attributes to create a product ID for PeopleSoft Order Management.

Navigation:

Items > **Configurable Item Templates** > **Item Add** > **Product Item Attributes**

Use the Item Add - Manufactured Item Attributes page (ITMFG_ALLMODS_TML4) to add item by reviewing or adding attributes to create a manufactured item for PeopleSoft Manufacturing.

Navigation:

Items > **Configurable Item Templates** > **Item Add** > **Manufactured Item Attributes**

Use the Item Add - Item Supplier Attributes page (ITVND_ALLMODS_TML4) to add information to the item and supplier combination for PeopleSoft Purchasing.

Navigation:

Items > **Configurable Item Templates** > **Item Add** > **Item Supplier Attributes**

Pages Used to Add Items Using the Item Add Component

Page Name	Definition Name	Usage
Item Add - Master Item Page	ITM_ALL_MODS_TML4	Add item by reviewing or adding attributes for the master item.
Item Add - Business Unit Item	IT_BU_ALLMODS_TML4	Add item by reviewing or adding attributes for the inventory business unit level.
Item Add - Inventory Management	IT_MM_ALLMODS_TML4	Add item by reviewing or adding attributes for inventory management.
Item Add - Inventory Fulfillment	IT_FF_ALLMODS_TML4	Add item by reviewing or adding attributes for inventory fulfillment.
Item Add - Purchasing Item Attributes	IT_PO_ALLMODS_TML4	Add item by reviewing or adding attributes to use the item in PeopleSoft Purchasing.
Item Add - Product Item Attributes	PRDIT_ALLMODS_TML4	Add item by reviewing or adding attributes to create a product ID for PeopleSoft Order Management.
Item Add - Manufactured Item Attributes	ITMFG_ALLMODS_TML4	Add item by reviewing or adding attributes to create a manufactured item for PeopleSoft Manufacturing.
Item Add - Item Supplier Attributes	ITVND_ALLMODS_TML4	Add information to the item and supplier combination for PeopleSoft Purchasing.

Item Add - Master Item Page

Use the Item Add - Master Item page (ITM_ALL_MODS_TML4) to add item by reviewing or adding attributes for the master item.

Navigation:

Items > **Configurable Item Templates** > **Item Add**

This example illustrates the fields and controls on the The Item Add-Master Item page (partial). You can find definitions for the fields and controls later on this page.

Field or Control	Description
SetID	Defines the SetID used to add the new item.
Item Template List ID	Identifies the template list ID (configurable item template) to be used.
Item ID	Enter the item ID to be used to create the new item. If you use automatic numbering for items, leave the item ID as NEXT, to assign the next sequential number. Item IDs cannot have embedded spaces or special characters.
Item Description	Enter a description of the item that is 60 characters or less.
Add Existing Item to New BUs	Select this check box to add items to new business units when the items already exist at the SetID level. In this case, the template list would only use the business unit level template groups.

Field or Control	Description
Show Displayable Fields	Select this check box to display value group fields that cannot be edited by the user. This setting refers to the fields on the fields group template where the **Modifiable** check box is deselected and the **Display on Template** check box is selected.
Add Item	Once you have finished your data entry, click this button to add the new item. At a minimum, you must enter values in the **Item ID** and **Item Description** fields before saving.

Item Add - Business Unit Item Page

Use the Item Add - Business Unit Item page (IT_BU_ALLMODS_TML4) to add item by reviewing or adding attributes for the inventory business unit level.

Navigation:

Items > **Configurable Item Templates** > **Item Add** > **Business Unit Item**

This example illustrates the fields and controls on the Item Add - Business Unit Item page (partial). You can find definitions for the fields and controls later on this page.

Field or Control	Description
Cost Profile	The user cannot change the **Cost Profile** field on this page. The value is determined on the values group template. If different values are needed for different cost books, then the changes should be made on the Define Business Unit Item - General: Costing page.
Business Unit	The new item is added to the PeopleSoft Inventory business units that appear. These business units are set on the values group template and can be changed on this page. You must select the **Show Displayable Fields** check box to view the **Select Business Units** group box.

Using Configurable Item Templates with the Item Loader Process

The Item Loader process can use configurable item templates. When an item template list ID is provided to the Item Loader process, then the default values from the configurable template are used to define the items in the PeopleSoft item tables. The template list ID can be entered on:

- The inbound Item_Sync EIP. The item template list ID is included in the message of the Item_Sync service operation at the master and business unit item segments. This service operation is asynchronous and is both inbound and outbound.

- The IN_MST_ITM_XLS component interface and the accompanying PeopleTools-delivered Microsoft Excel spreadsheet when using the Excel to Component Interface utility.

- The Item Loader process page.

Both the Item_Sync EIP and the IN_MST_ITM_XLS component interface can load item data with item template list IDs into the Item Loader staging tables. The template list IDs within the staging tables are used by the Item Loader process when creating the items in the PeopleSoft item tables. In addition, you can enter the item template list ID on the process page of the Item Loader. This template list is used when the item data in the staging table does not contain a template list ID. This template list enables you to use configurable item templates with item data that is staged from other sources, such as the Item Price List EIP.

In addition, the item template list ID field was added to the Data Definition Maintenance - Item Definition - General: Common page within the Maintain Data Definitions component (SCM Integrations, Transaction Error Handling, Maintain Data Definitions) for the ITEM transaction type, to enable you to correct the value.

The **Cost Element** field is also available on the Item_Sync EIP and IN_MST_ITM_XLS component interface.

The Item Loader process cannot use substitutes from the configurable item template.

For more information about the Item_Sync service operation, the IN_MST_ITM_XLS component interface, and the Item Loader process, see the "Loading Items" section of this product documentation.

For more information about the Excel to Component Interface Utility, see *PeopleTools: PeopleSoft Component Interfaces*, "Using the Excel to Component Interface Utility" topic.

Related Links

Setting Up the Item Master EIP
"Processing Inbound EIPs" (PeopleSoft Supply Chain Management Integration)
Using the Excel-to-Component-Interface Utility

Chapter 8

Using Item Catalog Maintenance

Understanding Item Catalog Maintenance

The Catalog Maintenance Template (ITM_MASS_TMPLT), Catalog Maintenance Extract (PO_WXPORT_CRITERIA), and Catalog Maintenance Update (PO_MASS_UPDATE) components enable you to efficiently update item data in the Item Loader staging tables in a secure and controlled environment.

The PeopleSoft Item Catalog Maintenance feature enables you to update item data for multiple items at one time. The item information is extracted from the item master tables into the item staging tables, where you can alter the data in a secure and controlled environment. You then use the Item Loader process to reload the data into the item master tables.

The Item Catalog Maintenance feature enables you to quickly change the data for large groups of items. This feature is especially useful for adding changes that affect numerous items. Examples include:

- Changing the item category for a large group of items.

- Increasing or decreasing the item prices by percentage.

- Correcting errors that are not found during an enterprise integration point (EIP) data load or MarketSite item load.

These are the steps to update data for items in PeopleSoft item master tables:

1. Create a template by using the Catalog Maintenance Template component:

   a. Use the **Record (Table) Name** field on the Catalog Maintenance Template page to enter the records from the item staging tables that correspond to the item master tables that you want to change.

   b. Select the **Export Records** check box to indicate that you want to use this template to export item data from the item master tables.

   c. Click the **View Export Records** link to view the name of the item master tables containing data that will be downloaded to the item staging tables.

   d. Click the **Assign Roles** link to access the Assign Roles page, where you select the roles with security rights to view and change item data by using this template.

   e. Click the linked record description on the Catalog Maintenance Template page to access the Select Fields page, where you can select the record fields that can be altered when using this template.

   f. Use the Catalog Maintenance Template - Secure Data page to restrict the rows of item data that are retrieved from the item master tables.

2. Use the Catalog Maintenance Extract component to:

a. (Optional) Further refine the item selection by using the Catalog Maintenance Extract - Global Criteria page.

b. (Optional) View the data that will be downloaded.

From the Catalog Maintenance Extract page, select the item master table to be viewed and then click the **View Data** button to access the Select Fields page. After you have selected the fields to view, the data in the fields appear. This is the data to be extracted from the item master tables.

c. Run the process that extracts the item data.

Click the **Execute Request** button to run the process.

3. Use the Catalog Maintenance Update component to:

a. (Optional) Narrow the selection of items to be updated by using the Catalog Maintenance Update - Global Criteria page.

b. Enter the changes to the item data by using the Catalog Maintenance Update page.

c. Run the process that updates the item staging tables with the changes.

Click the **Execute Request** button to run the process.

4. Use the Item Loader page to reload the items into the PeopleSoft item master tables.

Be sure to identify the template to be used and to select the value of *Item Export* in the **Item Load Type** field.

After you have placed an item in the item staging tables, any changes that you make to the item by using the standard pages may be overridden when the item is reloaded. A warning message appears when you access the downloaded items by using the following PeopleSoft pages and components:

*   Define Item component.

*   Purchasing Attributes component.

*   Item Approval page.

*   Define Business Unit Item component.

*   Define Item component.

*   Define Item - Units of Measure page.

*   Item Approval page.

*   Item Copy page.

*   Price Adjustments component.

*   Miscellaneous Charges page.

Changing the Item's Standard Unit of Measure

The standard unit of measure (UOM) for an item can only be changed before transactions have been entered for the item ID. You can use the Define Item-General page to change the standard UOM for a few item IDs. However, to change a large number of items you will want to use the item catalog maintenance feature. Use the following steps to ensure that standard UOM updates are done correctly:

1. Create a template to extract the MASTER_ITEM_TBL and the INV_ITEM_UOM tables.

    On the Catalog Maintenance Template component, enter the staging tables of MASTER_ITEM_EC and INV_ITEM_UOM_EC in the **Record (Table) Name** fields.

    Note: There is no need to extract the INV_ITEMS table. If the INV_ITEMS table is extracted, there is an additional step in the process, which is detailed below.

    ---

2. Use the Catalog Maintenance Extract component to extract the item data based on the template previously created.

3. Based on the same template and same selection criteria used in the previous step, use the Catalog Maintenance Update component to:

    a. Update the MASTER_ITEM_EC record with the new standard unit of measure (UNIT_MEASURE_STD).

    b. Update the action field (AUDIT_ACTN) on the MASTER_ITEM_EC record to the value of *C* (change).

        Note: If the INV_ITEMS record is extracted, use the Catalog Maintenance Update component to change the AUDIT_ACTN field on the INV_ITEM_EC record to the value of *C.* This step is not necessary if the INV_ITEMS record is not extracted.

        ---

    c. Click the **Execute Request** button to update the item staging tables with your changes.

4. Use the Item Loader page to reload the items into the PeopleSoft item master tables and update MASTER_ITEM_TBL and INV_ITEM_UOM tables with the new standard unit of measure.

    Be sure to identify the template to be used and to select the value of *Item Export* in the **Item Load Type** field.

Note: Once the Item Loader process is complete, the conversion rate for the standard UOM is set to 1. The Unit of Measure page (INV_ITEM_UOM) displays the conversion rate between the standard UOM and other UOMs used by the item. After you have run the Item Loader process, you need to validate or change the conversion rates for any existing UOMs.

Related Links
Understanding Item Loader Data Flow

Common Elements Used in This Topic

Field or Control	*Description*
Condition	This field is available for entry if you have two or more rows of criteria. Values are: *AND:* Select if you want the system to consider each of the selected criteria when narrowing the scope of the item data update. For example, suppose that you select account 212020 *and* alternate account 111000. The system updates only item data that has been assigned to account 212020 and alternate account 111000. *OR:* Select if you want the system to narrow the scope of the item data update by using any one of the selection criteria that you have selected. For example, suppose that you select account 212020 *or* alternate account 111000. The system updates item data that has been assigned to either account 212020 or alternate account 111000. Use a combination of *AND* and *OR* conditions to specify more complex selection criteria. For example, suppose that you select account 212020 *or* alternate account 111000 *and* primary buyer Atamian, Wes. The system updates item data that has been assigned to either account 212020 or alternate account 111000 and that has also been assigned to the primary buyer Atamian, Wes.
Field Name	The technical name of the field that is used as criteria. The fields that are available for selection depend on the record that is selected. The system provides any prompts that are associated with the field that you select.
Operator	Select to define the quantifier for the value that you enter in the **Value** field. Values are: *<=:* Less than or equal to the criteria. *>=:* Greater than or equal to the criteria. *Equal:* Equal to the criteria. *Greater:* Greater than the criteria. *Less:* Less than the criteria. *Not Equal:* Does not match the criteria. *Like:* Enables the use of wild cards in the **Value** field. The target item data must contain the criteria that are defined here. Valid wild cards depend on the database system. *Not Like:* Enables the use of wild cards in the **Value** field. The target item data must not contain the criteria that are defined here. Valid wild cards depend on the database system.

Field or Control	Description
Value	The system narrows the update to item data based on this value, combined with the operator value and the field that is selected.
<View Values>	Click to access the Select Valid Value page, where you can view and select values for the selected field.

Creating and Using Catalog Maintenance Templates

This topic discusses how to create and use catalog maintenance templates

Pages Used to Create and Use Catalog Maintenance Templates

Page Name	Definition Name	Usage
Catalog Maintenance Template Page	ITM_MASS_TMPLT	Create catalog maintenance templates that serve as guides to the fields and records that can be updated by the assigned role users.
Select Fields Page	PO_MASS_FLD_SEL	Select and view catalog maintenance update fields. • When you access this page from the Catalog Maintenance Template page, you can use the Select Fields page to specify the fields that a role that is assigned to the template can update. • When you access this page from the Catalog Maintenance Update page, you can use the Select Fields page to view the fields that you have chosen to update. • When you access this page from the Catalog Maintenance Update - Global Criteria page, you can use the Select Fields page to select the fields to include in the global criteria. Catalog Maintenance Template Page
Catalog Maintenance Template - Secure Data Page	ITM_TMPLT_GBL_CRT	Enter criteria to restrict the item data that is available to be altered.

Page Name	Definition Name	Usage
Item Ctlg Maint Role Assign Page(item catalog maintenance role assign)	ITM_TMPLT_OPR	Assign role users to the selected template. Catalog Maintenance Template Page

Catalog Maintenance Template Page

Use the Catalog Maintenance Template page (ITM_MASS_TMPLT) to create catalog maintenance templates that serve as guides to the fields and records that can be updated by the assigned role users.

Navigation:

SCM Integrations > **Setup** > **Catalog Maintenance Template**

This example illustrates the fields and controls on the Catalog Maintenance Template page. You can find definitions for the fields and controls later on this page.

Use the Catalog Maintenance Template component to create templates that define which records and fields can be extracted from the item master tables and updated. You assign role users to the templates to determine which users have authority to update the item data in the template. These templates serve as guides to which items can be updated and as security features.

Select Record

Field or Control	Description
Record (Table) Name	Enter the record that is accessible to the roles that are assigned to the selected template. This record determines which fields are available for selection in the **Select Fields** scroll area. The records that are available for selection are limited to those that are currently in the staging tables for the Item Loader process.
<Record Description>	Click the linked record description of the selected record (table) name to access the Select Fields page, where you can specify the fields that a role that is assigned to the template can update.

Select Fields

Use the **Select Fields** scroll area to select the fields that you want to include in the template.

Field or Control	Description
Export Records	Select to enable users of this template to extract item data from the item master tables into the item staging tables, where the items can be changed.
Update All Staged Data	Select to enable users of this template to update any data in the item staging tables without the template restrictions. Only power users should use this feature.
Assign Roles	Click to access the Assign Roles page, where you can assign role users to the selected template.
View Export Records	Click to view the item master tables that contain item data that will be extracted to the item staging tables. The tables that are displayed are based on the entries in the **Record (Table) Name** field.

Warning! Only power users should select the **Update All Staged Data** check box. This option enables you to update data that is not related to the template.

Related Links

Loading Items and Prices Using the Item Price List EIP
Understanding Item Catalog Maintenance
Updating Staged Item Data

Select Fields Page

Use the Select Fields page (PO_MASS_FLD_SEL) to select and view catalog maintenance update fields.

Navigation:

Click the linked record description on the Catalog Maintenance Template page.

Click the linked record description on the Secure Data page.

The link text depends on the value in the **Record (Table) Name** field. If you are in Add mode, the link text is **Select Fields.**

This page cannot be accessed unless a value is selected in the **Record (Table) Name** field.

Field or Control	*Description*
Select	When you access this page from the Catalog Maintenance Template page, select to add the associated field to the item template. The fields that are available for selection are all of those that are not already assigned to the template. Select as many fields as necessary.
	When you access this page from the Catalog Maintenance Update - Global Criteria page, select to add the associated field to the global criteria.
	When accessed from the Secure Data page, select to add the associated field to the data extraction criteria.
	When you click **OK,** the values that you selected appear on the primary page from which you accessed this page.
	When accessed from the Catalog Maintenance Update page, any fields that you have selected to update on the Catalog Maintenance Update page appear with their associated check boxes selected.

Related Links
Updating Staged Item Data

Ctlg Maint Role Assign Page

Use the Item Ctlg Maint Role Assign (item catalog maintenance role assign) page (ITM_TMPLT_OPR) to assign role users to the selected template.

Navigation:

Click the **Assign Roles** link on the Catalog Maintenance Template page.

Assign Roles

Field or Control	Description
Role Name	The role that is assigned to the template. When using the Catalog Maintenance Update component, users are able to access only the templates to which their own roles have been assigned.

See the product documentation for *PeopleTools: Security Administration*.

Related Links

Creating and Using Catalog Maintenance Templates

Catalog Maintenance Template - Secure Data Page

Use the Catalog Maintenance Template - Secure Data page (ITM_TMPLT_GBL_CRT) to enter criteria to restrict the item data that is available to be altered.

Navigation:

SCM Integrations > **Setup** > **Catalog Maintenance Template** > **Secure Data**

This example illustrates the fields and controls on the Catalog Maintenance Template - Secure Data page. You can find definitions for the fields and controls later on this page.

Use this page to restrict the data that is extracted from the item master tables that are listed on the Catalog Maintenance Template page. Specify the criteria that must be met before a row of data can be extracted from the item master tables to the item staging tables. Be sure to specify criteria to restrict the download to the current, active row of data.

Extracting Item Data

This topic discusses how to extract item data:

After a template is defined, you can extract the data from the item master tables and store it in the item staging tables. Use the Catalog Maintenance Extract component to:

• (Optional) Narrow the item data selection.

• Extract item data to the staging tables.

Pages Used to Extract Item Data

Page Name	Definition Name	Usage
Catalog Maintenance Extract Page	PO_EXPORT_CRITERIA	Select the item record to download and run the extract process to move data from the item master tables to the item staging tables.
Select Fields Page	PO_MASS_FLD_SEL	Select the fields for which you want to view data.
Item Ctlg Maint Export View Log Page (item catalog maintenance export view log)	PO_EXPORT_LOG	View the meta SQL that is used to extract the data.
Catalog Maintenance Extract - Global Criteria Page	PO_EXP_GLB_CRTRIA	Enter criteria to further restrict the item data that is available to be changed.
Select Valid Value Page	PO_MASS_VAL_SEL	Select values for the associated field. This page is accessible only when the selected field name has associated value prompts. Select the value that you want to use as a filter in combination with the value in the **Operator** field on the Catalog Maintenance Extract - Global Criteria page.

Catalog Maintenance Extract Page

Use the Catalog Maintenance Extract page (PO_EXPORT_CRITERIA) to select the item record to download and run the extract process to move data from the item master tables to the item staging tables.

Navigation:

SCM Integrations > **Process Transactions** > **Items** > **Catalog Maintenance Extract**

This example illustrates the fields and controls on the Catalog Maintenance Extract page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Delete Pending Stage Records	Select to delete rows in the item staging table from a previous extraction process. This option enables you to purge existing data for this template in the item staging tables.
Execute Request	Click the **Execute Request** button to run the PeopleCode that extracts the data. The records that you select on this page are retrieved from the item master tables and placed in the item staging tables.
View Data	Click to access the Select Fields page, where you can select the fields to view. Then click **OK** on the Select Fields page to access the View Data page, where you can review data. The text of this link changes depending on the record that is selected in the **Record (Table) Name** field.
View Log	Select to access the Item Ctlg Maint Export ViewLog (item catalog maintenance export view log) page, where you can view information about updates that are made by using this selection criteria ID. The information on this page can be useful for backtracking purposes. The text of this link changes depending on the name of the record that is selected in the **Record (Table) Name** field.

Select Fields Page

Use the Select Fields page (PO_MASS_FLD_SEL) to select the fields for which you want to view data.

Select the **check box** next to the item master table you want to view. Click the **View Data** link.

Select the fields that you want to view, and then click **OK.**

Catalog Maintenance Extract - Global Criteria Page

Use the Catalog Maintenance Extract - Global Criteria page (PO_EXP_GLB_CRTRIA) to enter criteria to further restrict the item data that is available to be changed.

Navigation:

SCM Integrations > **Process Transactions** > **Items** > **Catalog Maintenance Extract** > **Global Criteria**

This example illustrates the fields and controls on the Catalog Maintenance Extract - Global Criteria page. You can find definitions for the fields and controls later on this page.

To filter items before extracting them, use the fields on this page to filter items that you do not want to extract.

Select Record

Select the records that you want to include in the global criteria. This narrows the scope of fields that you want to update.

Field or Control	Description
Record (Table) Name	Enter the record that you want to include in the global criteria. This record determines which fields are available for selection in the **Enter Criteria** scroll area.

Enter Criteria

Define field criteria to use to narrow the scope of the item data update. For example, select **Field Name** *ACCOUNT,* **Operator** *Equal,* and **Value** *212020* to isolate the item data updates to items that are associated with account 212020.

Field or Control	Description
<View Values>	Click to access the Select valid value page, where you can select values to use as filters in the **Value** field.
<Choose a date>	Click to access a calendar, where you can select a date to be placed in the **Value** field.

Note: When you are entering criteria for an effective-dated record, the system assumes these two criteria when extracting the data if no criteria was entered for the fields:
Effective Date (EFFDT) equals the maximum date prior or equal to the current date.
Status of Effective Date (EFF_STATUS) equals *A* (Active).

Related Links

Creating and Using Catalog Maintenance Templates

Updating Staged Item Data

This topic discusses how to update staged item data:

The PeopleSoft application staged item update functionality enables you to efficiently update item data in the Item Loader staging tables in a secure and controlled environment. Using catalog maintenance templates and the pages in the Catalog Maintenance Update component, you can specify the values with which to update existing records and fields and narrow the scope of the fields to update.

Pages Used to Update Staged Item Data

Page Name	Definition Name	Usage
Catalog Maintenance Update Page	PO_MASS_UPDATE	Select item data records and fields that you want to update. Specify the values with which you want to update the item data. After you save the information that you enter in this component, you can return and carry out the same item data changes by selecting the same control ID.
Select Valid Value Page	PO_MASS_VAL_SEL	View and select values for the associated field. This page is accessible only when the selected field name has associated value prompts.
View Data Page	MASS_VIEW	Preview the item data changes that you specified on the Catalog Maintenance Update pages.

Page Name	Definition Name	Usage
Select Fields Page	PO_MASS_FLD_SEL	• When you access this page from the Catalog Maintenance Update page, view the fields that you have chosen to update. • When you access this page from the Catalog Maintenance Update - Global Criteria page, select the fields to include in the global criteria.
Item Ctlg Maint Update ViewLog (item catalog maintenance update view log)	PO_MASS_LOG	View information about updates to item data that are made by using the selected control ID. The information on this page can be useful for backtracking purposes. Each time you click the **Execute** button on the Catalog Maintenance Update page for a control ID, a new log record is created. Catalog Maintenance Update Page
Catalog Maintenance Update - Global Criteria Page	PO_MASS_GLB_CRTRIA	Specify any criteria that you want to use to narrow the scope of records to be updated.

Catalog Maintenance Update Page

Use the Catalog Maintenance Update page (PO_MASS_UPDATE) to select item data records and fields that you want to update.

Specify the values with which you want to update the item data. After you save the information that you enter in this component, you can return and carry out the same item data changes by selecting the same control ID.

Navigation:

SCM Integrations > **Process Transactions** > **Items** > **Catalog Maintenance Update**

This example illustrates the fields and controls on the Catalog Maintenance Update page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Entered On	Displays the date that the selection criteria ID was created.

Select Record

Field or Control	Description
Record (Table) Name	Select the record that you want to update. Only records that are defined in the selected template ID are available for selection. Select the check box next to this field to activate the links at the bottom of the Catalog Maintenance Update page.

Update Fields

Select the fields that you want to update, and define the values with which you want to update the fields.

Field or Control	Description
Field Name	Enter the object name of the field to be updated. Fields that are available for selection are based on the table that is selected in the **Record (Table) Name** field. The system provides any prompts that are associated with the field that you select. If prompts are applicable, the **View Values** button becomes available for use with the **Value** field. If the selected field is numeric, the **%** field becomes available for entry. The fields that are available for selection depend on the selected template ID.
Value	The value with which the selected field will be updated. If the **%** field is also available for entry, enter a value in only one of these fields.
% (percentage)	If the selected field name is numeric, this field is available for entry, in addition to the **Value** field. Enter a value in only one of these fields. For example, if you want to update item pricing by a specific percentage increase or decrease, enter a value in the **%** field.
Execute Request	Click to perform the item data updates that you have defined.

Select Valid Value Page

Use the Select valid value page (PO_MASS_VAL_SEL) to view and select values for the associated field.

This page is accessible only when the selected field name has associated value prompts.

Navigation:

Click the **View Values** button on the Catalog Maintenance Update page or the Catalog Maintenance Update - Global Criteria page.

Field or Control	Description
Select	Select the appropriate field value and click **OK.** The value that you selected appears on the page that you used to access the Select valid value page.

View Data Page

Use the View Data page (MASS_VIEW) to preview the item data changes that you specified on the Catalog Maintenance Update pages.

Navigation:

Click the **View Data** link on the Catalog Maintenance Update page. Or click **OK** on the Select Fields page.

The column headings that appear on this page depend on the item data updates that you defined on the Catalog Maintenance Update pages.

The information that appears in the columns provides a preview of the changes that will be made to the item data.

Field or Control	Description
Rows	The number of rows that will be altered by updates that are defined on the Catalog Maintenance Update pages.

Ctlg Maint Update ViewLog Page

Use the Item Ctlg Maint Update ViewLog (item catalog maintenance update view log) page (PO_MASS_LOG) to view information about updates to item data that are made by using the selected control ID.

The information on this page can be useful for backtracking purposes. Each time you click the Execute button on the Catalog Maintenance Update page for a control ID, a new log record is created.

Navigation:

Click the **View Log** link on the Catalog Maintenance Update page.

This example illustrates the fields and controls on the Item Ctlg Maint Update ViewLog page. You can find definitions for the fields and controls later on this page.

Update Log

Field or Control	Description
Record (Table) Name	Displays the name of the record that was updated.
User ID	Displays the user ID of the person who performed the item update process.
Datetime Modified	Displays the date and time when the update was performed.
Count	Displays the number of records that were updated.
Scope of Work	Displays the information about the changes that were made by the selected update.

Catalog Maintenance Update - Global Criteria Page

Use the Catalog Maintenance Update - Global Criteria page (PO_MASS_GLB_CRTRIA) to specify any criteria that you want to use to narrow the scope of records to be updated.

Navigation:

SCM Integrations > **Process Transactions** > **Items** > **Catalog Maintenance Update** > **Global Criteria**

This example illustrates the fields and controls on the Catalog Maintenance Update - Global Criteria page. You can find definitions for the fields and controls later on this page.

Select Record

Select the records that you want to include in the global criteria. This narrows the scope of fields that you want to update.

Field or Control	Description
Record (Table) Name	Enter the record that you want to include in the global criteria. This record determines which fields are available for selection in the **Enter Criteria** scroll area.

Enter Criteria

Use the **Enter Criteria** scroll area to define field criteria to narrow the scope of the item data update. For example, select **Field Name** *ACCOUNT,* **Operator** *Equal,* and **Value** *212020* to isolate the item data updates to items that are associated with account 212020.

Field or Control	Description
<View Values>	Click the **View Values** button to access the Select valid value page, where you can select values to use as filters in the *Value* field.
<Choose a date>	Select to access a calendar, where you can select a date to be placed in the *Value* field.

Related Links
Creating and Using Catalog Maintenance Templates

Chapter 9

Delivered Workflow for PeopleSoft Managing Items

Delivered Workflow for PeopleSoft Managing Items

This topic discusses PeopleSoft workflow for managing items. The workflows are listed alphabetically by workflow name.

Item Approval

The section discusses the item approval workflow.

Description

Information Type	Description
Event Description	This workflow routes item approvals to appropriate role users. Select item approval method on the Installation Options-Overall page.
Action Description	Selecting a worklist entry transfers you to the Item Approval page. If approval is denied, then an email is sent.
Notification Method	Email and Worklist

Workflow Objects

Information Type	Description
Event	MASTER_ITEM_TBL
Workflow Action	Route for approval
Role	Role is defined by user.
Email Template	INV_ITEM_A_WL

Information Type	Description
Business Process	Approve Inventory Items
Business Activity	Inventory Item Approval and Item Approval
Business Event	Inventory Item Approval, Inventory Item Denial, and Inventory Item Under Initialization.

Chapter 10

PeopleSoft Item Reports

PeopleSoft Item Reports

This table lists the items reports sorted in alphanumerical order by report ID. The reports listed are SQR reports. If you need more information about a report, refer to the report details at the end of this topic.

Report ID and Report Name	Description	Run Control Page
Item Status Change Exception (INS4000)	The Item Status Change process generates this report when a scheduled item status change to *Inactive* cannot be implemented. The Item Status Change process produces two versions of this report. One version reflects scheduled *Inactive* status changes that could not be made for the item at the business unit level, the other shows *Inactive* status changes that could not be made at the SetID level.	RUN_INS4000
Device Tracking Master List (INS9030)	Displays device-tracked items, filtered according to the specified parameters.	RUN_INS9030
Basic Item Listing (INS9040)	Lists the basic attributes for each item.	RUN_INS9040

PeopleSoft Item Reports: A to Z

This topic provides detailed information on individual reports. The reports are listed in alphanumerical order by report ID.

Item Status Change Exception (INS4000)

Note: If the Item Status Change process successfully implements all scheduled changes to *Inactive* status, the Item Status Change Exception report is not generated.

Exceptions can exist on the business unit or the SetID level.

If an item cannot be inactivated at the **business unit level,** the business unit level report lists all business unit tables where transactions preventing inactivation exist.

Field or Control	Description
Reference to Item Exists in Table	Business unit table that contains a record or transaction that prevents the item from being inactivated. All records or transactions are listed where this item ID still exists.

If an item cannot be inactivated at the **SetID level,** the SetID report lists the business units where the item has not been successfully inactivated. You cannot inactivate an item at the SetID level until the item has been inactivated at all business units that belong to the SetID.

Field or Control	Description
Business Units Where Item Not Inactive	Business units where the items status has not been successfully changed to *Inactive,* preventing inactivation at the SetID level.

Device Tracking Master List (INS9030)

Field or Control	Description
Include Inactive Items	Select to include items that are restricted to warehouse movement transactions, adjustments, RMA and RTV transactions, and receiving transaction.

Basic Item Listing (INS9040)

For information on Basic Item Listing, see Managing Inventory by Item Status.