PeopleSoft FSCM 9.2: PeopleSoft Catalog Management

March 2024

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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 PeopleSoft Online Help

If you’re setting up an on-premises 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. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, “Installing PeopleSoft Online Help.”

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, 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.

Typographical Convention	*Description*
⇒	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

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Chapter 1

Getting Started With PeopleSoft Catalog Management

Common Elements Used in Catalog Management

Field or Control	*Description*
Offering ID and **Description**	The catalog offering ID and offering description fields are named differently based on the catalog type. For example: *Procurement:* Item ID. *Customer:* Product ID. *Training:* Catalog Item ID. **Note:** There are also variations of some other fields based on catalog type. Screenshots for this book were taken using a procurement catalog.
Partner ID and **Version**	Values are based on the selected partner catalog selected on the Enterprise Catalog Console page.
SetID and **Catalog ID**	Values are based on the selected enterprise catalog on the Catalog Management Home page.

PeopleSoft Catalog Management Overview

PeopleSoft Catalog Management simplifies catalog content integration, enabling organizations to:

- Register and maintain catalog partners.
- Import and update partner content.
- Define transformation and filtering rules to convert content.
- Build and maintain category hierarchies.
- Automatically categorize product offerings.
- Manage enterprise catalog and partner catalog versions.

- Syndicate catalog content.

Important! This product is on Sustaining Support as of March 2021. For additional information, see Oracle's Lifetime Support Policy at https://www.oracle.com/support/lifetime-support/.

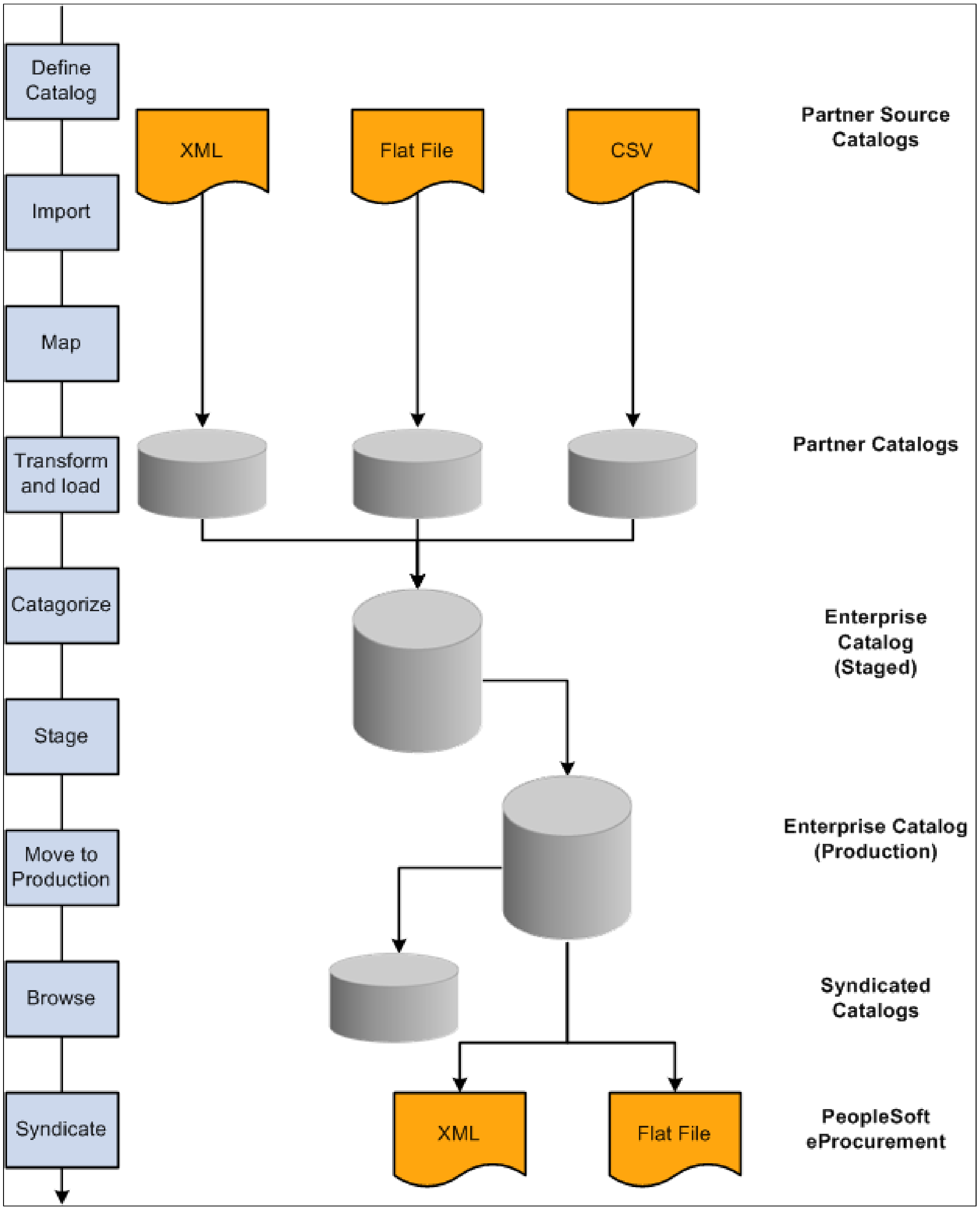
Related Links

Registering Catalog Partners
Defining Catalog Source Layouts
Defining Catalog Maps
Creating Categorization Rules
Staging Partner Offerings
Moving Catalogs to Production

PeopleSoft Catalog Management Business Processes

The following diagram illustrates the catalog management business process flow.

The catalog management business process flow



The business process topics discuss these business processes in this documentation.

PeopleSoft Catalog Management Integrations

PeopleSoft Catalog Management integrates with the PeopleSoft products like Common Partner Registration, Data Transformer and Partner Source File.

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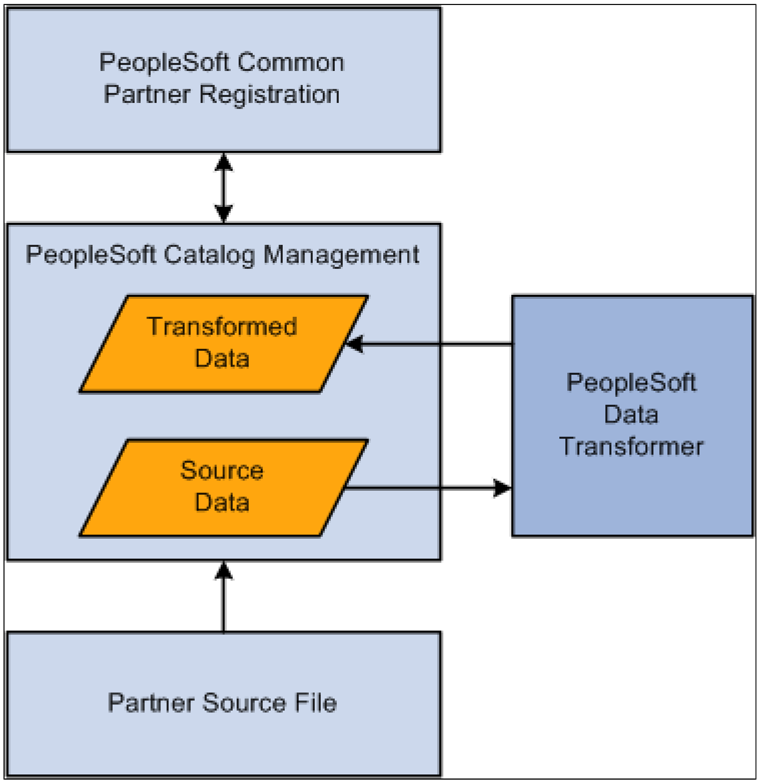


The implementation topics in of this documentation discuss integration considerations.

PeopleSoft Catalog Management Implementation

PeopleSoft Catalog Management implementation can be divided into the following activities:

- Store attachment files.
- Define installation options.
- Create categories and category hierarchies.
- Create enterprise catalog definitions.
- Register partners.

In the planning phase of the implementation, take advantage of all PeopleSoft sources of information, including the installation guides and business process maps.

Storing Attachment Files

PeopleSoft Catalog Management allows you to capture, store, and utilize attributes related to an offering.

Step	***Reference***
Define the URL identifier for the file server where you are storing attachments.	See *PeopleTools: System and Server Administration*

Defining Installation Options

PeopleSoft Catalog Management installation options are entered at the time of implementation:

Step	***Reference***
Define PeopleSoft Catalog Management installation options.	See Defining Installation Options.
Define fields for categorization rules.	See Procurement Categorization, Customer Categorization or Training Categorization Page.
Define default workflow notifications.	See Defining Default Workflow Notifications.

Creating Categories and Category Hierarchies

With PeopleSoft Catalog Management, you can either create categories and category hierarchies, or you can use the United Nations Standard Products and Services Classification Code (UNSPSC).

Step	***Reference***
Create categories.	See Maintain Categories Page.
Create category hierarchies.	See Maintain Category Hierarchies Page.
Load UNSPSC.	See Load Hierarchy Page.

Creating Enterprise Catalog Definitions

The following table describes the steps required to create an enterprise catalog definition of a given type.

Step	***Reference***
Define general catalog information.	See Maintain Catalogs - General Page.
Assign enterprise managers and grant privileges.	See Maintain Catalogs - Enterprise Managers Page.
Assign partners and grant privileges.	See Maintain Catalogs - Partners Page.

Step	***Reference***
Associate category hierarchies.	See Maintain Catalogs - Categories Page.
Specify workflow options.	See Maintain Catalogs - Workflow Options Page.

Registering Partners

The catalog administrator can register partners within PeopleSoft Catalog Management. The system automatically approves the registration and updates PeopleSoft Maintain Catalog Partners.

Step	***Reference***
Create Provide Catalog Information and View Catalog Information services within PeopleSoft Maintain Catalog Partners. In order to register partners in PeopleSoft Catalog Management the provide and view catalog information services must be created within the PeopleSoft Maintain Catalog Partners component.	See Creating Enterprise Catalog Definitions.
Register partners.	See Registering Catalog Partners.
Associate users with registered partners.	See Maintain Catalog Partners - Information Page.

Chapter 2

Understanding PeopleSoft Catalog Management

Managing Partner Processes

Catalog Management enables the organization to share catalog content with partners. Partners can import and manage their own content. Partners can:

- Define the catalog source.
- Import, transform, and load content into the catalog.
- Categorize offering data and review categorization results.
- Stage approved catalog offerings.
- Manually update their data.
- Browse staged and production versions of the enterprise catalog.

Related Links

Maintain Catalogs - Partners Page

Creating Category Hierarchies

With Catalog Management, you can either create categories and category hierarchies, use the United Nations Standard Products and Services Classification code (UNSPSC), or use PeopleSoft trees. You can support multiple hierarchies within a catalog in order to syndicate content for customers or partners using their preferred category hierarchy. You can:

- Add and maintain categories.
- Rearrange the category hierarchy.
- Create an unlimited number of category levels.
- Import the UNSPSC hierarchy.
- Use category hierarchies set up by Tree Manager.
- Manage multiple hierarchies within a single catalog.

Related Links

Creating Categories and Category Hierarchies

Defining Transformations

Every partner's content is different in format and structure, and every catalog requires its own format and structure based on its type. You can define transformations to translate each partner's catalog content into the appropriate catalog format and structure. To simplify the source-to-target mapping effort, Catalog Management automates most data transformation setup and maintenance. Before defining catalog maps, you can:

- Set up target field default values.
- Define filtering rules to identify structured content that does not meet standard criteria.
- Standardize the domain of attribute values by replacing attribute values with equivalent predefined values.
- Perform calculations to derive additional attributes.
- Perform string manipulations.

Related Links

Understanding the Transformation and Loading Process

Defining Categorization

Organizing offerings into a category hierarchy enables users to quickly search and locate appropriate products and services. With Catalog Management, you can:

- Automatically categorize content based on offering names or partner categories.
- Assign an offering to one or more categories in a hierarchy.
- Match offerings from multiple partners into a common catalog offering, or create a separate catalog offering for each partner and offering combination.

Creating Versioning

Catalog Management maintains multiple versions of both partner catalogs and enterprise catalogs.

A new version of a partner catalog is created when the process to load partner offerings is run.

Content updates are applied to a staged copy of the unified catalog, and then moved to production, enabling review and verification of the content prior to syndication. When the process to move the catalog to production is run, a new catalog version is created by incrementing the version by one. As a result, changes can be made to the catalog without hindering day-to-day browsing, syndication, and purchasing needs.

Once a version is selected for production, all other versions are stored but not used again. The Remove Unused Versions feature provides a way for the catalog manager to remove these unused partner versions.

Archiving and Purging

Archiving catalog data allows catalog managers to manage the volumes of data maintained by Catalog Management by moving enterprise catalog data, that is no longer required, to history files. Removing this historical data from online tables prevents the database from increasing to an unmanageable size, and improves overall performance. The purge feature deletes previously archived data from the system. Once purged, the data cannot be restored.

Managing Security

With Catalog Management, both you and your partners use the same application for importing and managing structured content. The configurable security model built into Catalog Management enables you to:

- Create and manage users and roles using standard PeopleTools user administration.
- Assign user privileges to perform catalog administration functions, such as categorizing partner content, syndicating content, and moving a catalog to production.

Defining Roles

There are four significant roles in Catalog Management: the administrator, the taxonomist, the manager within the enterprise, and the catalog partner.

Field or Control	***Description***
Enterprise Catalog Administrator	The enterprise catalog administrator has access to all catalog setup information and the ability to assign themselves as an enterprise catalog manager for all catalogs that he or she creates. This person creates catalogs and grants catalog access. **Note:** Only enterprise catalog managers can gain access to catalog content.
Taxonomist	The taxonomist defines categories and category hierarchies.

Field or Control	***Description***
Enterprise Catalog Manager	The enterprise catalog manager has access to catalogs to create and maintain data. This person manages data on behalf of a partner or for items provided directly by the enterprise. The catalog manager performs these activities: • Catalog, partner, and partner offering maintenance. • Importing, transforming, and loading data. • Categorization. • Staging. • Moving catalogs to production. • Rollback (Return to a previous version of the production catalog). • Syndication. • Browsing enterprise and partner offerings. • Manually updating enterprise catalog offerings and partner offerings.
Catalog Partner	Catalog partners can access only their own catalogs. Access is determined by permissions assigned at the catalog level. The enterprise catalog manager and the catalog partner share the responsibility for catalog content maintenance. The catalog partner performs these activities: • Partner offering maintenance. • Importing, transforming, and loading data. • Categorization. • Staging. • Browsing partner offerings. • Manually updating partner offerings.

Chapter 3

Accessing PeopleSoft Catalog Management Functions

Navigating PeopleSoft Catalog Management

This topic discusses Catalog Management navigation.

Pages Used to Navigate PeopleSoft Catalog Management

Page Name	***Definition Name***	***Usage***
Catalog Management Home page	EOCM_MAIN_PAGE	Create and maintain catalogs, partners, and categories. Select an enterprise catalog to work with.
Enterprise Catalog Console page	EOCM_CATALOG_DASH	Produce, roll back, syndicate, and browse the selected catalog. Update catalog data. Select a partner catalog to work with.
Partner Catalog Console page	EOCM_PARTNER_DASH	Manage and view partner submissions to the selected enterprise catalog.
Catalog Workbench Page	EOCM_CAT_WRKBCH	View and load catalog items based on a load process type.

Understanding PeopleSoft Catalog Management Navigation

Catalog Management provides multiple levels of navigation. Activities that do not require you to select an existing catalog are available from the application homepage. These activities are also available from the menu navigation.

You also use the homepage to select a specific enterprise catalog and access the Enterprise Catalog Console page, where you can perform activities such as moving the catalog to production, rolling back the catalog to another version, and syndicating the catalog. On this page, you can select a partner catalog to access the Partner Catalog Console page and manage data for the partner catalog. Enterprise and partner catalog activities are not available from the menu navigation; you can only access them from the Enterprise Catalog Console and Partner Catalog Console pages.

Catalog Management allows to use the Catalog Workbench for catalogs, where apart from having several Catalog actions, it is the main place to monitor and execute catalog items load processes using the Quick Items Load Process

From the homepage or menu navigation, you can:

- Create and maintain catalogs.
- Create and maintain catalog partners.
- Specify file formats for catalog source data.
- Import partner data.
- Define workflow preferences.
- Create and maintain categories and category hierarchies.
- Load the United Nations Standard Products and Services Classification (UNSPSC) scheme or a PeopleSoft tree into a category hierarchy.
- Create and maintain category rules and substitutions.
- Select an enterprise catalog to work with.

From the Enterprise Catalog Console page, you can:

- Move a staged catalog to production.
- Roll back the production catalog to a previous version.
- Syndicate the catalog to partners.
- Browse the staged or production catalog.
- Define a master catalog map.
- Manually enter or change catalog data.
- Archive, purge, or restore catalog data.
- Select a partner catalog to work with.

From the Partner Catalog Console page, you can:

- Map partner catalog structure to the catalog structure.
- Load partner data.
- Categorize partner data and review and approve the results.
- Stage the partner catalog.
- Browse the partner catalog.
- Manually enter or change catalog data.
- Compare partner catalog versions.
- Remove unused partner catalog versions.

From the Catalog Workbench page, you can:

- Search for Quick Load and Step by Step Catalogs.
- Initiate/Continue the Load Items process.
- Correct Errors.
- View Lifeline.
- Review Offerings.
- Approve Offerings.
- View Purchasing Tree.
- Access Process Monitor.
- Archive/Purge Catalog data.
- Compare Versions.
- Define Master Catalog map.
- Load Items History.
- Maintain Ent Catalog Data.
- Maintain Partner Data.
- Remove Unused Versions.
- Rollback Catalog.
- Syndicate Catalog.

Important! If a user has not been granted privileges for certain activities using PeopleTools Security Administration, the links to those activities are not displayed.

Setting Up PeopleSoft Catalog Management

This section provides an overview of Catalog Management setup and discusses how to:

- Store attachment files.
- Define installation options.
- Define default workflow notifications.
- Create categories and category hierarchies.
- Register catalog partners.
- Define Quick Item Load Process
- Define Catalog Management Workbench

Chapter 4

Setting Up PeopleSoft Catalog Management

Storing Attachment Files

This section provides an overview of the attachments and images feature, and discusses how to store attachment files.

Understanding Attachments and Images Feature

The Attachments and Images feature allows you to capture, store, and utilize attributes related to an offering. These attributes can be the visual representation of an offering, the owner's manual in pdf form, or any type of file.

While browsing offerings within either a staged or production version of the catalog, the attachments and images feature allows users to:

- Link to the partner's website and view the offering's specifications at the source.
- View one or more attachment files that can be of any type, including a picture.

  The system allows multiple attachments to be associated to a single offering.

Use the "URL Maintenance Page" (Approval Framework)to define the URL identifier for the file server where you are storing attachments. Catalog Management uses the URL Identifier named EOCM_ATT_URL.

Note: To launch the attachments from within Catalog Management, this URL identifier must be defined.

To define the Catalog Management URL identifier:

1. Define and share a common file server folder to store the attachments.

   In order to be accessed by the application servers, this folder must be shared.
2. Access the URL Maintenance page.

   Select the URL Identifier named EOCM_ATT_URL.
3. Enter the URL using the format ftp://userid:password@localhost.
4. Click **Save.**

Defining Installation Options

This topic discusses how to specify installation parameters and select fields for categorization rules. To define installation options, use the Installation Options (EOCM_INSTALLATION) component.

Pages Used to Define Installation Options

Page Name	***Definition Name***	***Usage***
Installation Options Page	EOCM_INSTALL_PAGE	Specify installation parameters.
Procurement Categorization, Customer Categorization or Training Categorization Page	EOCM_SETCAT_EPRO EOCM_SETCAT_CRM EOCM_SETCAT_ELM	Select fields for procurement categorization rules. Select fields for customer categorization rules. Select fields for training categorization rules.

Specifying Installation Parameters

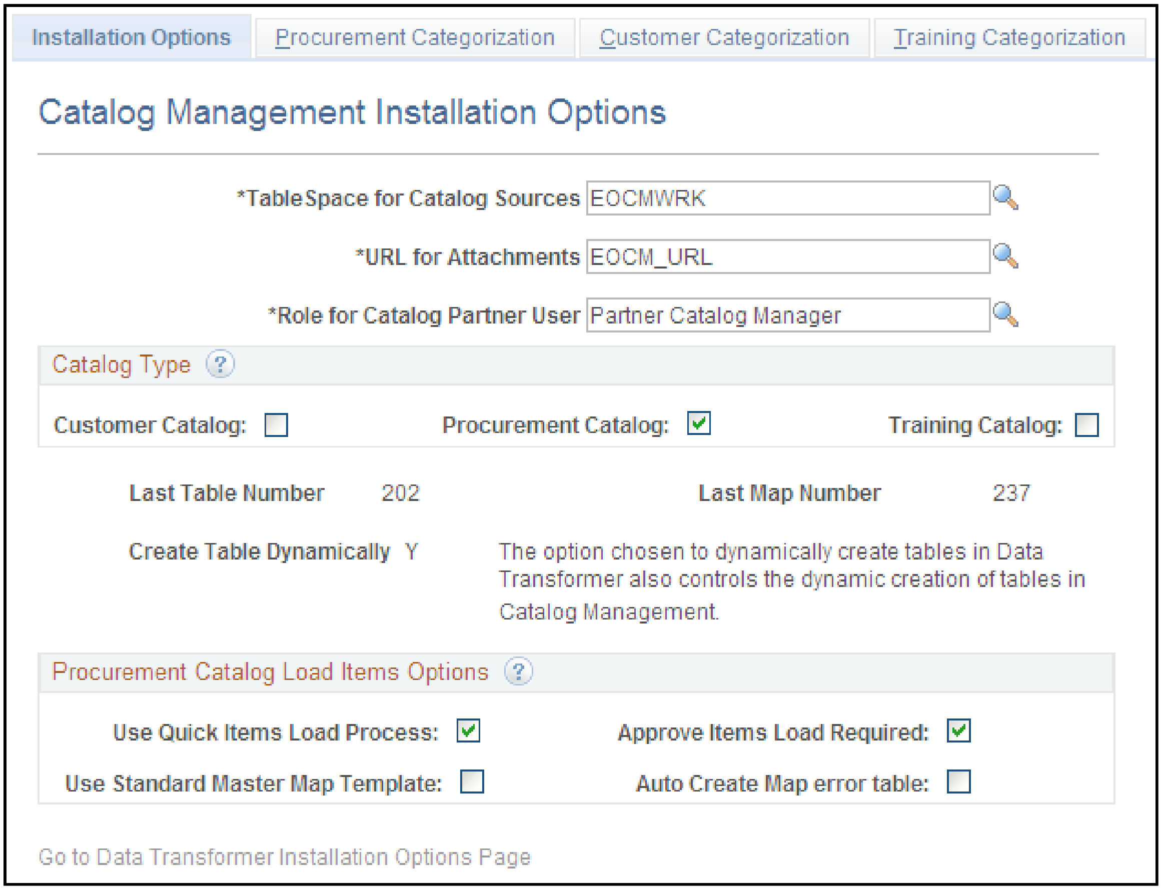
Installation Options Page

Use the Installation Options page (EOCM_INSTALL_PAGE) to specify installation parameters.

Navigation:

Catalog Management > **Define Installation Options** > **Installation Options**

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



Field or Control	***Description***
TableSpace for Catalog Sources	Select the location to store the temporary tables associated with the catalog source data. This location is used for all database platforms, where tables must be stored in tablespaces.
URL for Attachments	Enter the URL that represents either the File Transfer Protocol (FTP) address or the database table used for storing the catalog source files, which are loaded as attachments. This URL is required to load source files.
Role for Catalog Partner User	Select the role to assign to partner users entered using the Maintain Catalog Partners component.
Procurement Catalog, Customer Catalog, and **Training Catalog**	Select the types of catalogs that you use.

Field or Control	Description
Last Table Number	Displays the last sequential table number used for creating catalog sources. Tables are named using EOCM_TMPxxxxxx format. xxxxxx is replaced with the table number.
Last Map Number	Displays the last sequential map number used for creating catalog maps. Maps are named using CCM_xxxxxxxxx format. xxxxxxxxx is replaced with the map number.
Create Table Dynamically	The option chosen to dynamically create tables in Data Transformer also controls the dynamic creation of tables in Catalog Management.

Procurement Catalog Load Items Options

Field or Control	Description
Use Quick Items Load Process	Select the flag to use the Quick Items Load process as the default load process for all existing or future catalogs/partners in the system. When checked, the Use Standard PS Master MAP fields become available. When unchecked, the regular step-by-step Item Load process is used for all catalogs, unless overridden at catalog level. The default for this field is unchecked.
Approve Items Load Required	This flag controls all users except Partners, as they always require approval. Click to enable approval for administrators before moving the loaded data into production. When enabled, the load process stops after item categorization and the catalog status changes to *Pending Approvals*. If unchecked, the process runs completely to move data into Purchasing/ eProcurement. The default for this field is checked.
Use Standard Master MAP Template	Select to use the delivered standard Data Source to create Master Data Source and Master Maps for future and/or existing catalogs. If you choose to apply the Quick Load Process setting to existing catalogs upon Save time, Master Data Source and Master Maps will be created for each active SetID/Catalogs in the system.
Auto Create Map error table	Select to automatically create the corresponding Error table when creating a map and the Handle Errors flag, which is selected on the map definition page.

Note: The above fields are accessible only for users with Catalog Administrator permissions.

Note: Catalogs with the Use Quick Items Load Process flag selected at Catalog Definition page are displayed on the Catalog Workbench as a default search result. Users can use the **Catalog Load Process Type** to search for other catalogs.

Related Links

Maintain Catalogs - General Page

Procurement Categorization, Customer Categorization or Training Categorization Page

Use the Procurement Categorization page (EOCM_SETCAT_EPRO) to select fields for procurement categorization rules.

Navigation:

Catalog Management > **Define Installation Options** > **Procurement Categorization**

On each page, select the fields to use for matching partner offerings to your offerings. Categorization rules are based on the selected fields.

Defining Default Workflow Notifications

To define default workflow notifications, use the Catalog Notification (EOCM_DEFLT_NOTIFY) component. This topic discusses notification details and the ways to define default notifications.

Pages Used to Define Default Workflow Notifications

Page Name	***Definition Name***	***Usage***
Define Notification Defaults Page	EOCM_DEFLT_NOTIFY	Specify the process stages when users should be notified.

Understanding Workflow Notifications

When managing catalogs, workflow notifications can be used to inform partners and managers of status changes and other relevant activities. Using workflow, automatic notifications can be sent to catalog managers when work needs to be reviewed or approved, or when a process, such as categorization or load, has finished. Email notifications can be triggered for these stages:

- Loaded.
- Categorized.
- Offering approved.
- Categories approved.

- Staged.
- Moved to production.
- Rolled back.
- Syndicated.

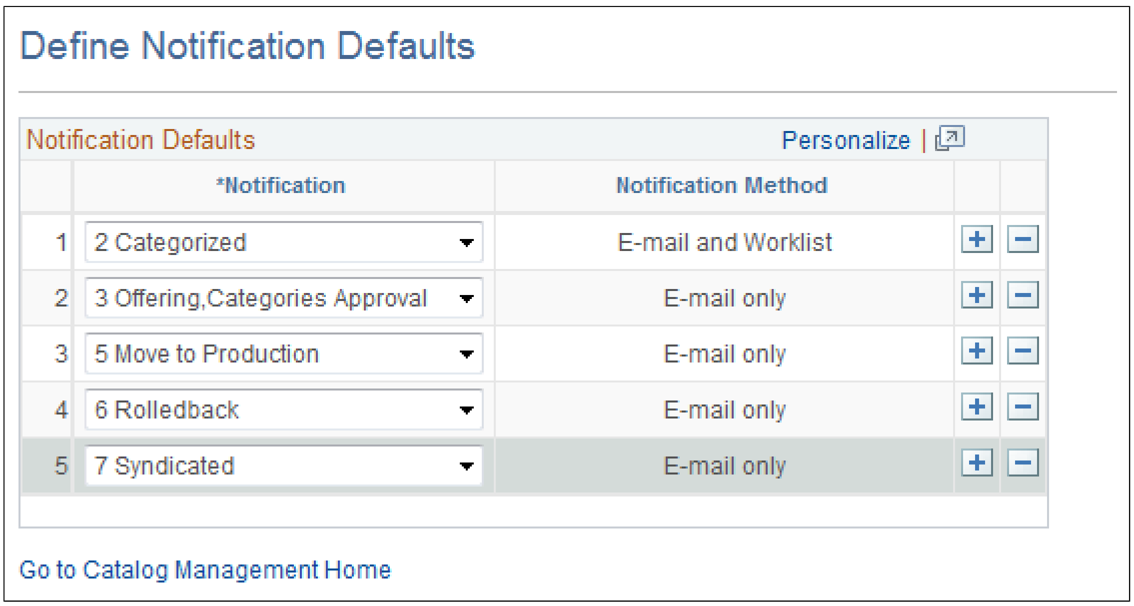
Note: A worklist notification is also triggered for the approval process since action is required from the enterprise catalog manager before the approval process is completed.

Define Notification Defaults Page

Navigation:

Catalog Management > **Catalog Management Home Page** > **Define Notification Defaults.**

This example illustrates the fields and controls on the Define Notification Defaults page.



Specify the different stages of the process when users should be notified. The notification method is displayed. The stages selected here can be changed for individual catalogs.

Related Links

Setting User Profile Attributes

Maintain Catalogs - Workflow Options Page

Creating Categories and Category Hierarchies

To create categories and category hierarchies, use the Category (EOCM_CATEGORY), Load Category Hierarchy (EOCM_LOAD_UNSPSC), and Category Hierarchy (EOCM_HIERARCHY) component.

This topic provides an overview of categories and category hierarchies, and discusses how to create categories, create category hierarchies, and load hierarchies.

Pages Used to Create Categories and Category Hierarchies

Page Name	***Definition Name***	***Usage***
Maintain Categories Page	EOCM_CATEGORY	Create and maintain categories (groupings of offerings) that are used within category hierarchies.
Maintain Category Hierarchies Page	EOCM_CAT_HIER	Create and maintain hierarchical structures for displaying catalog offerings.
Load Hierarchy Page	EOCM_LOAD_UNSPSC	Load the UNSPSC classification scheme or a PeopleSoft tree into a category hierarchy.

Understanding Categories and Category Hierarchies

You use categories to assemble similar offerings into groups. With categories, similar offerings are members of a class, similar classes are members of a more general class, or family, and so on. The relationship among offerings and the relationship of an offering to its class are necessary for effectively searching and finding appropriate products and services.

A hierarchy organizes available offerings into parent and child relationships.

With Catalog Management, you can either create categories and category hierarchies, use the UNSPSC, or use PeopleSoft trees.

The UNSPSC system is an open, global electronic commerce standard that provides a logical framework for classifying products and services. The UNSPSC is a hierarchal classification with five levels. The levels allow users to search products more precisely, because searches are confined to logical categories.

For example, the commodity Pen Refills is part of a larger class of products, Ink and Lead Refills, which in turn is part of a family of products, Office Supplies, which is itself part of a segment of products, Office Equipment, Accessories, and Supplies. Each level of the hierarchy has its own unique number.

Maintain Categories Page

Use the Maintain Categories page

Navigation:

Catalog Management > **Categories** > **Maintain Categories.**

Field or Control	***Description***
Category Name	Enter a name to describe the group of offerings.
Comments	Enter a more detailed description.
Category Code	(Options) Enter a code for this category. This field is used when downloading the UNSPSC classification scheme into a category hierarchy.

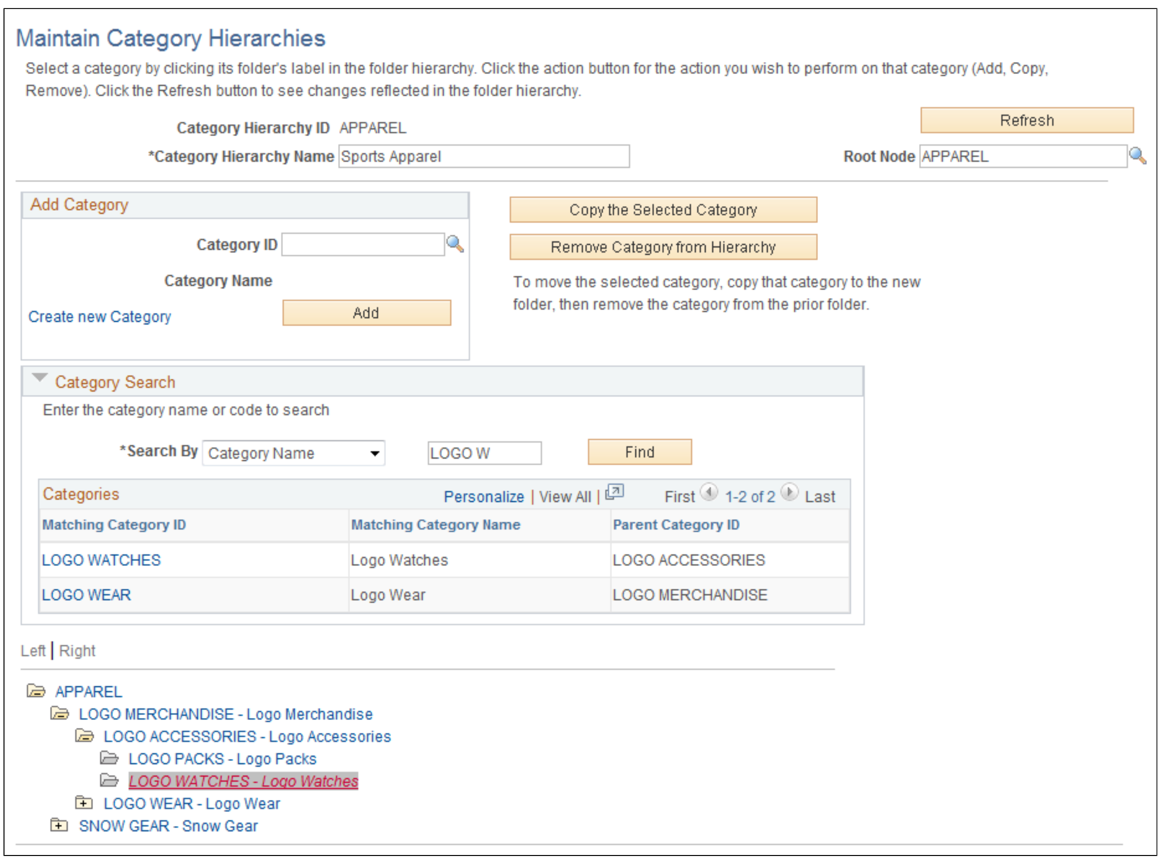
Maintain Category Hierarchies Page

Use the Maintain Category Hierarchies page

Navigation:

Catalog Management > **Categories** > **Maintain Category Hierarchies.**

This example illustrates the fields and controls on the Maintain Category Hierarchies page. You can find definitions for the fields and controls later on this page.



Create and maintain hierarchical structures to display catalog offerings. Category hierarchies have their own IDs, so they can be used across multiple catalogs.

Field or Control	***Description***
Category Hierarchy Name	Enter a unique name to describe this hierarchy.
Refresh	Click to refresh the hierarchy tree after returning from the Copy Category page. The hierarchy tree is resorted alphabetically within a branch and reflects all changes.
Add Category	To add an existing category to the hierarchy: 1. Select the parent category in the hierarchy tree 2. Select a category. 3. Click **Add.** The category appears in the tree as the child of the selected parent category. To add a new category: 1. Select the parent category in the hierarchy tree. 2. Click the **Create New Category** link to display the Maintain Categories page. 3. Enter the new category ID, name, and comments. Click **OK.** The new category ID and name appear in the Add Category section. 4. Click **Add.** The category appears as the child of the selected parent category.
Copy the Selected Category	To copy a category to another location in the hierarchy: 1. Select the category to copy, and click **Copy the Selected Category** to display the Select Category page. 2. Highlight the category that you want as the parent of the copied category, and click **OK.** The selected category is copied to its new parent. If children exist, they are also copied.

Field or Control	***Description***
Remove Category From Hierarchy	Select the category to remove, and click **Remove Category From Hierarchy.** The category is not removed if: • Offerings are present. • Children exist. **Note:** To move a category, first copy the category to the new parent, then remove the original category.

Find Category Feature

The Find Category feature allows you to easily search for a category in any hierarchy. The system will automatically expand the hierarchy from the root to the category being searched. This is useful in cases where there are several levels of categories, or where a category is present in multiple paths.

You can search categories by code or by name. For name searches a partial name can be entered, and a list of all categories that match the search criteria are returned. If a category matching the search criteria is present in multiple paths all paths are returned. Click the category ID of the desired category. The category hierarchy will expand and the selected category will be highlighted in the hierarchy.

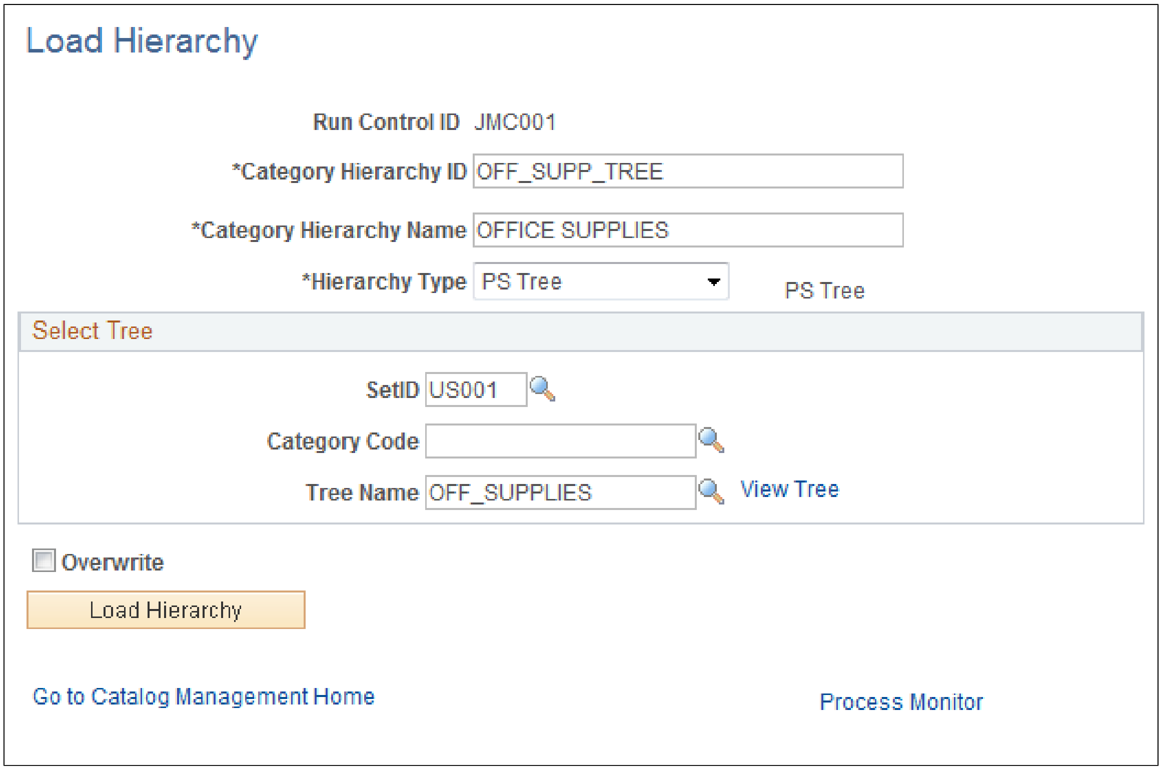
Note: By default, the group box is collapsed when you first access the page.

Load Hierarchy Page

Navigation:

Catalog Management > **Categories** > **Load Hierarchy.**

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



Field or Control	***Description***
Hierarchy Type	Select *PS Tree* or *UNSPSC.* **Note:** If you choose *UNSPSC,* you need to download the file from the UNSPSC homepage and save it as a text (tab-delimited) file. If you choose PS Tree the fields in the **Select Tree** group box become active.
SetID and **Tree Name**	Select a **SetID** and **Tree Name** to choose a PeopleSoft tree. Click the **View Tree** link to open a new browser window and view the selected tree in Tree Manager's **View Tree** component.
Category Code	Select a field from the Tree Manager node record, which you want to use to populate the category code field in Catalog Management. If no node record field qualifies as a category code leave this field blank. **Note:** The Lookup is dynamically populated based on the tree you select.
Overwrite	Select if the hierarchy already exists and you want to replace it. Deselect for the hierarchy to be assumed unique and added.

Field or Control	Description
Load Hierarchy	Click to run the application engine EOCM_UNSPSC process. **Note:** You will be prompted to locate and select the file on the computer. When selected, the navigation path appears. Click the **Upload** button to process the request. The process is submitted. Click the **Process Monitor** link to monitor the status requests. When the process has completed successfully, the categories and hierarchy are available in Catalog Management.

See the product documentation for *PeopleTools: Process Scheduler*

Registering Catalog Partners

To register catalog partners, use the Maintain Catalog Partners (EOTP_QUICKPARTNER) component.

This topic provides an overview of catalog partner registration and discusses how to add new partner information and partner address information..:

Pages Used to Maintain Catalog Partners

Page Name	Definition Name	Usage
Maintain Catalog Partners - Information Page	EOTP_CATPARTNER	Create and maintain catalog partners and partner users, and grant access privileges.
Maintain Catalog Partners - Addresses Page	EOTP_PRT_ADDR2	Enter a partner's company address and alternate address information. Update a partner's address information, then click the Save button.

Understanding Catalog Partner Registration

As part of defining a catalog, you specify which partners provide or view catalog content, and you grant specific security authorization to individual partner users. Before you can do this, the partners must be registered and approved in Maintain Catalog Partners.

The basic steps to complete partner registration are:

1. Create required Catalog Management services.

   Services are created automatically within Maintain Catalog Partners if they do not exist for the process and SetID combinations selected when a partner is created through Catalog Management.

2. Register the partner.
3. Approve the registration and notify the partner.

   Partners registered using the Maintain Catalog Partners component are automatically approved.
4. Associate users with the registered partner.

You use the Maintain Catalog Partners component to register partners for Catalog Management. Once the registration is complete, you can manually send the partner an email acknowledging approval, along with the URL, user ID and password required to access the PeopleSoft system. The partner can then add individual users who are responsible for either performing catalog management tasks and activities or just viewing the catalog.

Note: Partners who require registration approval for services outside of Catalog Management must be registered using the Maintain Catalog Partners system.

When defining a new enterprise catalog, privileges are granted to individual partner users for performing specific tasks and activities.

Related Links

Maintain Catalogs - Partners Page

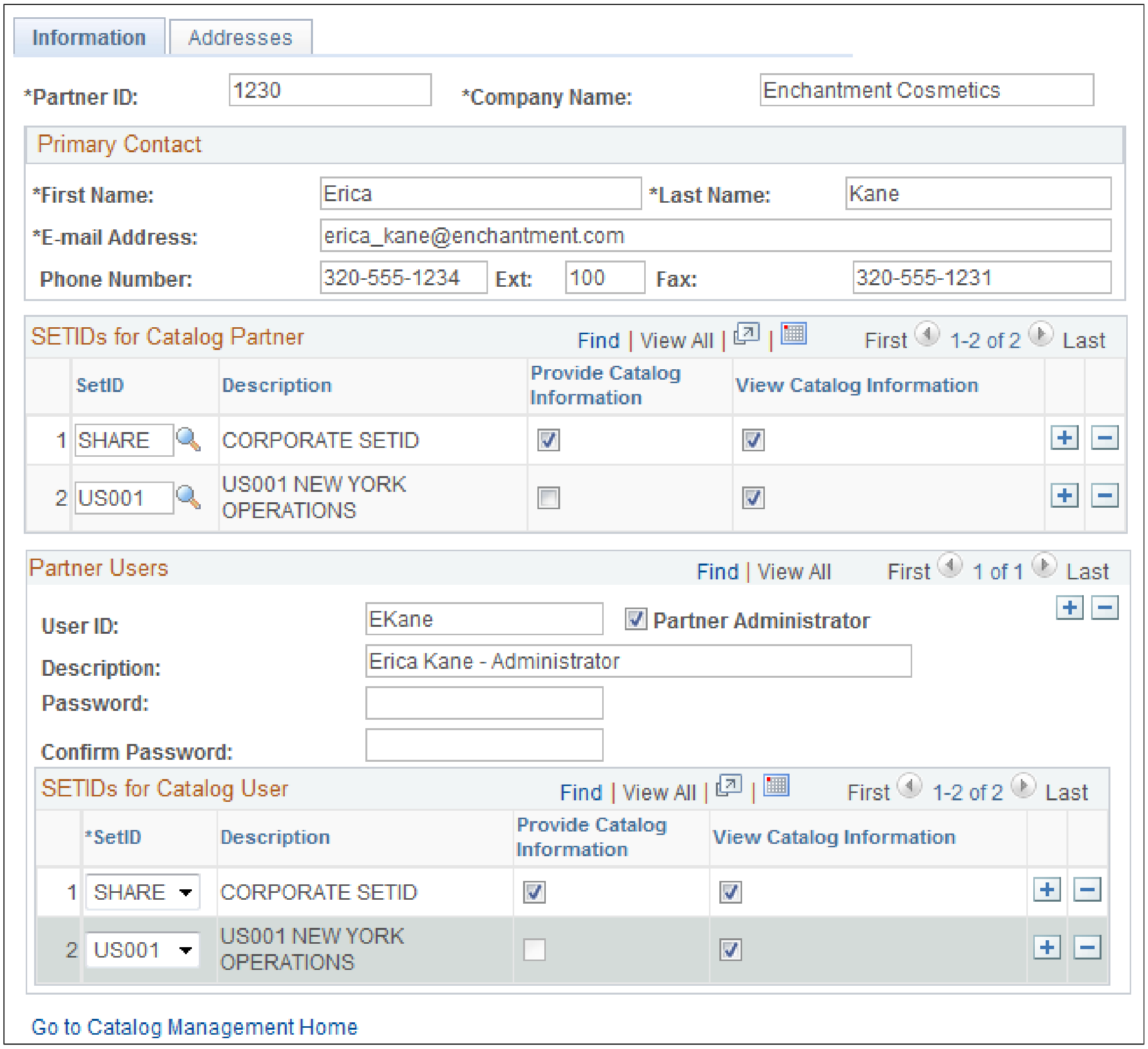
Maintain Catalog Partners - Information Page

Use the Maintain Catalog Partners - Information page (EOTP_CATPARTNER) to create and maintain catalog partners and partner users, and grant access privileges.

Navigation:

Catalog Management > **Maintain Catalog Partners**

This example illustrates the fields and controls on the Maintain Catalog Partners - Information page. You can find definitions for the fields and controls later on this page.



Note: To create partner user profiles, the Partner ID user profile type must be enabled.

SetIDs for Catalog Partner

Define the SetIDs that each partner can access. You must select at least one SetID. If catalog services do not exist in the system for the selected SetID, the system automatically creates them and assigns them to the partner as requested.

Field or Control	***Description***
Provide Catalog Information	Select if any users associated with this SetID are responsible for performing catalog management tasks and activities.
View Catalog Information	Select if any users associated with this SetID have access to view catalogs only.

Partner Users

Enter information for each individual user associated with the partner. Only SetIDs assigned to the partner can be assigned to the partner user.

Field or Control	***Description***
User ID	Enter a unique ID for the user to access the Catalog Management system
Description	Enter up to a 30-character description, such as the user's name
Operator Password (Encrypted) and **Confirm Password**	Enter and confirm a password for the user to access Catalog Management.
Partner Administrator	Select if this user is an administrator. **Note:** Partner administrators have access to this page to add new partner users and revoke or assign catalog services to existing partner users.

SetIDs for Catalog User

Define the SetIDs and access privileges for each partner user. All partner users are assigned the role defined with the Define Installation Options component.

If the partner is granted access to only view catalog information, the Provide Catalog Information option is not available on the partner users grid.

Note: The catalog partner role must be defined on the Installation Options page before partner user profiles can be created.

Saving Partner Information

Once saved:

- The partner is automatically registered with Partner status.
- Services associated with the partner are automatically assigned and approved.
- Partner user profile attributes can only be changed through PeopleTools security.

See the product documentation for *PeopleTools: Security Administration*

Maintain Catalog Partners - Addresses Page

Use the Maintain Catalog Partners - Addresses page (EOTP_PRT_ADDR2) to enter a partner's company address and alternate address information.

Update a partner's address information, then click the Save button.

Navigation:

Catalog Management > **Maintain Catalog Partners** > **Addresses**

Note: Address fields shown on the page are specific to the chosen country.

Field or Control	***Description***
Corporate Address and **Alternate Address**	Corporate Address is automatically selected when you first open this page. If you select to add a second address, Alternate Address is automatically selected. **Note:** Only two addresses can be added for a single partner.
Address fields	Displays the company's address once it has been entered.

Defining Quick Items Load Process

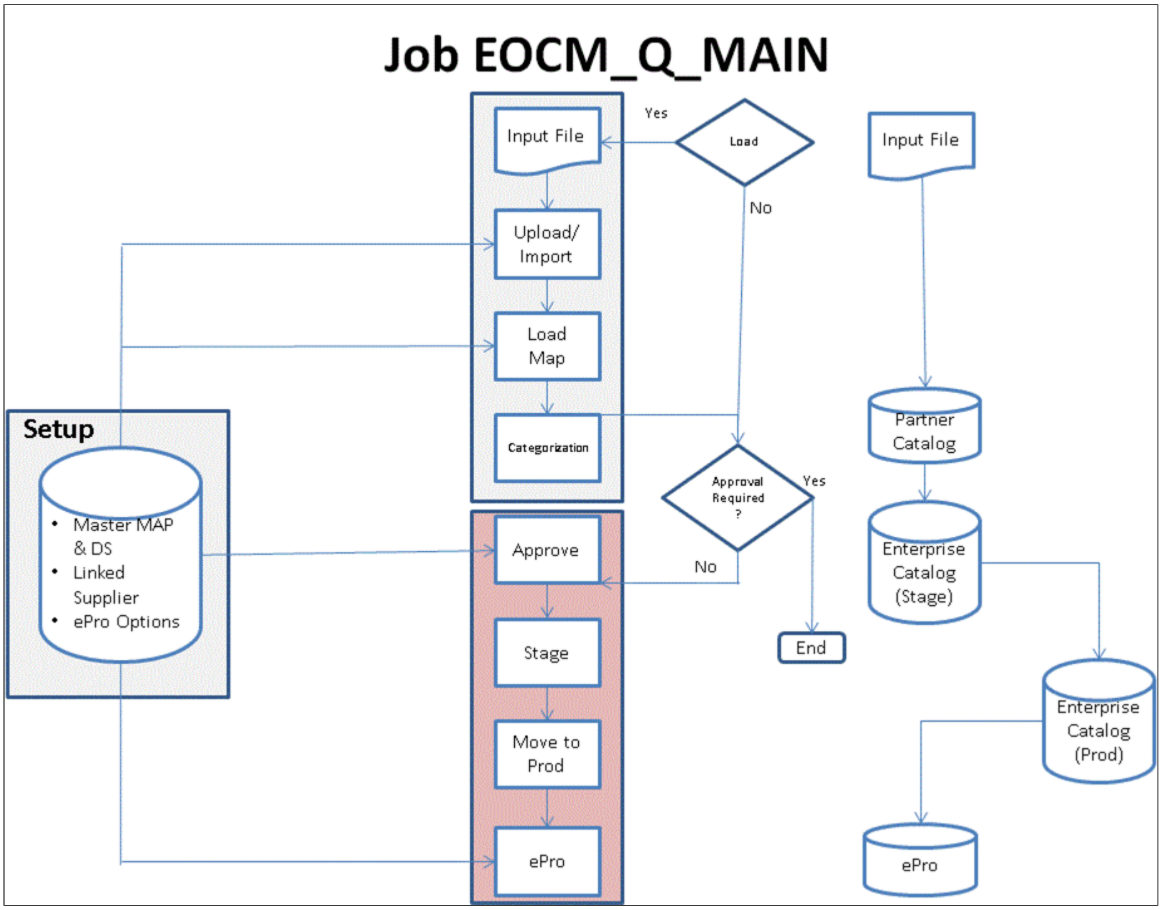
This section provides an overview of the Quick Items Load Process.

Quick Items Load Process

The Quick Items Load Process centralizes all of the steps and processes needed to load items through Catalog Management into eProcurement. All processing is done through the Manage Catalogs Workbench. This provides a centralized location from which most error handling can be done. Various methods of error correction are accessible through the Manage Catalogs Workbench

The Quick Load Items Process is implemented to facilitate the load items task by reducing the number of steps to accomplish it. Users can choose to enable the Quick Item Load process at the system level on the Catalog Management Installation Option page or at the catalog level on the Catalog Definition page.

This diagram illustrates the Quick Items Load Process.



The Quick Items Load process has two sequential sections, load and approval. They can be initiated together in one run, or can be initiated separately depending on user roles and setups.

The load section includes the file import, load and categorization processes, while the approval section includes offering approvals, staging, move to production, and the CUP load processes.

Partners can only initiate the load section. Catalog and enterprise administrators can initiate both or either sections depending on setup and load process status.

Partners have the option to review and/or change the loaded items before they are available for catalog administrator to approve and move into product/purchasing.

Informational email notification can be setup to inform partners and approvers that a load process is completed for a specific catalog. Approvers can also receive a worklist task to proceed with approval and complete the process.

While all rows are approved by default, items and/or categories can be rejected on the approval page, accessed using a Pending Approval icon. Partners can assign the offerings to new categories during a quick load process, and administrators can switch between review and approval pages.

If validation or processing errors are encountered during the Quick Load Process, users can view and/or correct the errors on the Catalog Management Workbench page. When errors are produced, the *Load Stage* turns into a hyperlink, as *Errors.* Clicking on the *Load Stage* link or the *Errors* icon on the lifespan, displays a page with the errors produced

Defining Catalog Management Workbench

Defining Catalog Management Workbench

This section provides an overview of the Catalog Management Workbench.

Catalog Management Workbench

Catalog Management uses the Catalog Management Workbench component (EOCM_CATWRKBCH_CMP) to execute the Quick Item Load process. Users can select a source file and click the **Load Items** button to initiate either a Full or an Incremental Load to move items into production and Purchasing. This process supports loading of a single partner's source file at a time.

All rows in the item file can be processed through production only if there are no validation errors in any row, or all errors encountered have been corrected or removed.

A partner can initiate the Quick Load process to run the following consolidated processes: Upload/Import, Load Map, and Categorization; the partner also has the option to review the data loaded before approval processing can start.

For a catalog administrator, approval option can be setup to control whether or not the administrator can process the item file using the Quick Load process all the way into Purchasing.

- If approval is required, clicking the **Load Items** button initiates the following consolidated processes: Upload/Import file, Load Map, and Categorization. The **Pending Approval** icon becomes active on the lifeline for the specific catalog on the workbench. An approver is required to review/approve the data loaded to initiate the remaining processes.
- If approval is not required, clicking the **Load Items** button initiates the following consolidated processes: Upload/Import file, Load Map, Categorization, Approval (auto approval), Staging, Move to Production, and ePro CUP process to load items into Purchasing.

If a catalog is setup as an Express Catalog, Quick Item Load process runs through production only and is not moved into Purchasing's item tables. Users should run the Search Framework indexing of eProcurment to index these express catalog items into the Search Framework repository for item searching in eProcurement Requisition.

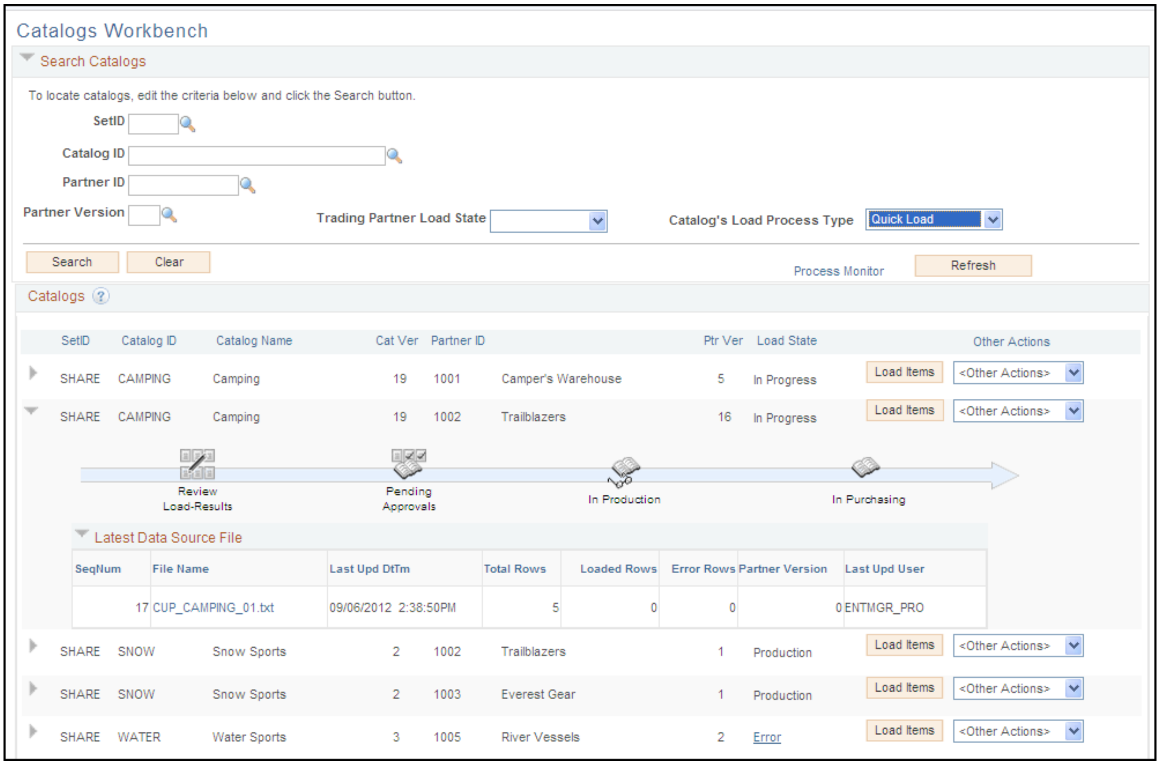
Catalog Workbench Page

Use the Catalog Workbench Page (EOCM_CAT_WRKBCH) to locate and execute the Quick Items Load process.

Navigation:

Catalog Management > **Catalog Workbench**

This example illustrates the fields and controls on the Catalog Workbench Page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Search Catalogs	The workbench page displays all user authorized catalogs based on the search criteria: • SetID • Catalog ID • Partner ID • Partner Version
Trading Partner Load State	Select the trading partner load state from the options: • *Created* • *Error* • *In Progress* • *Pending Approval* • *Production* • *Purchasing* • *Purchasing/Errors* • *Waiting Review*

Field or Control	***Description***
Catalog's Load Process Type	Catalog identification is also based on Load Process Type: • *Quick Load*: Select to display catalogs that are of type Quick Load. This is the default selection. • *Step by Step Load*: Select to display catalogs that are of type Step by Step Load. A blank selection results in a display of all user authorized catalogs. If there is no data available, a message displays stating the same.
Load Items button	Click to load items. If the catalog is setup to use the **Step by Step** load process, it displays a message with an option to access the Partner's Console and proceed with the corresponding load process. **Note:** There are only two options available in the **Other Actions** options, Catalog Console and Partner Console.
Icons	Click the Expand/Collapse Section on the catalogs setup to use the Quick Items Load process and display icons of progress in lifespan. Four icons are shown on the lifespan for a Master catalog, and three for an Express catalog (no Purchasing). The icons are *active* or *inactive* depending on the catalog/partner version load state.
Review Load-Results icon	Displays as **active** once a file is added. It also indicates if review is done, or if it is required. It changes to **Review errors** icon when a handled load error occurs. Click to go to Categorization Review page.
Pending Approvals icon	Displays as **active** if there are approvals pending. Click to browse the approval page, where items and/or categories can be rejected (all rows are approved by default).
In Production icon	Displays as **active** when loaded data is moved to production within Catalog Management, after the approval process is complete. Click to browse production data.

Field or Control	***Description***
In Purchasing icon	Displays as **active** when production data within Catalog Management is moved to Purchasing via ePro CUP process after approval. This icon does not appear in the lifeline if the catalog is defined as an Express Catalog. It changes to **Review CUP-Errors** when the CUP process encounters errors. Clicking on **Review CUP-Errors** icon takes you to the **Validate and Process Imported Items**. Navigation: **eProcurement** > **Administer Procurement** > **Maintain Supplier Integration** > **Import Item Catalog File** link **Process Imported Items** on the run control page.

Note: A catalog workbench row cannot be expanded if no item file is loaded through the Quick Item Load process.

Chapter 5

Creating Enterprise Catalog Definitions

Defining New Enterprise Catalogs

To define enterprise catalogs, use the Maintain Catalogs (EOCM_CATALOG) component.

This topic defines the common elements and discusses the ways of defining general catalog information, assigning enterprise managers and granting privileges. It also discusses the methods of assigning partners and granting privileges, associating category hierarchies, and specifying workflow options.

Pages Used to Define New Enterprise Catalogs

Page Name	*Definition Name*	*Usage*
Maintain Catalogs - General Page	EOCM_CATALOG_MAIN	Enter general catalog information, including name and catalog type.
Maintain Catalogs - Enterprise Managers Page	EOCM_CATALOG_MAN	Assign enterprise managers and grant privileges.
Maintain Catalogs - Partners Page	EOCM_CATALOG_TP2	Assign partners and grant privileges.
Maintain Catalogs - Categories Page	EOCM_CATALOG_CAT	Associate category hierarchies.
Maintain Catalogs - Workflow Options Page	EOCM_CATALOG_WORKF	Specify the Catalog Management process stages to notify enterprise managers and partners.
Maintain Catalogs - ePro Load Options Page	EOCM_CATALOG_EPRO	View the load options in eProcurement

Common Elements Used to Define New Enterprise Catalogs

Field or Control	*Description*
Categorize	Select to grant privileges to categorize partner offerings and review results.
Define Map	Select to grant privileges to map partner source attributes to the enterprise catalog's attributes.

Field or Control	***Description***
Load Data	Select to grant privileges to transform source data to the enterprise catalog format.
Notify	Select to receive workflow notifications based on the workflow options set for this catalog and the user's privileges.
Stage	Select to grant privileges to move a partner's input to staging. Staging indicates that a partner's input to the catalog is ready for inclusion in the enterprise catalog.

Related Links

Defining Catalog Maps
Transforming and Loading Data
Staging Partner Offerings

Maintain Catalogs - General Page

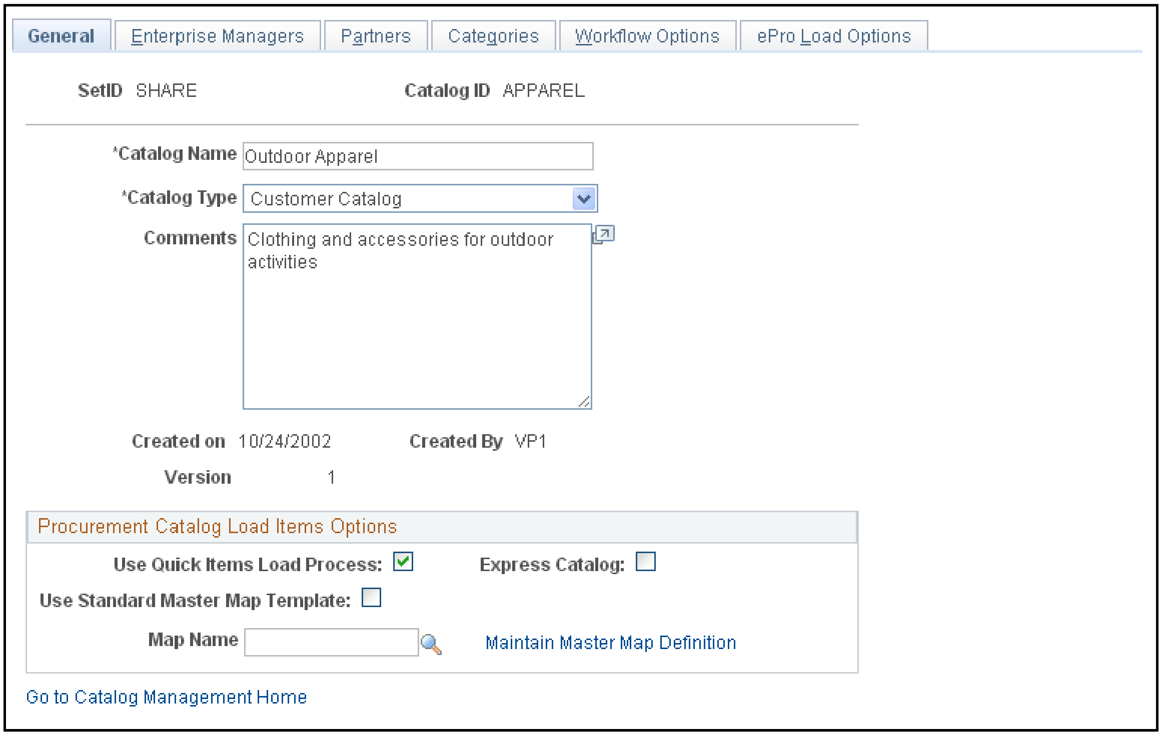
Use the General page (EOCM_CATALOG_MAIN) to enter general catalog information, including name and catalog type.

Navigation:

Catalog Management > **Catalog Management Home Page** > **Maintain Catalogs** > **General**

Catalog Management > **Catalogs** > **Maintain Catalogs** > **General**

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



Field or Control	Description
Catalog Type	Select from *Training, Procurement,* or *Customer.* **Note:** The catalog types listed are based on selected installation options.
Catalog Version	Displays the latest working catalog version. **Note:** For a new enterprise catalog, the version is *1.* When the catalog is successfully moved to production, the version number for the working catalog is incremented by one.

Procurement Catalog Load Items Options

Field or Control	Description
Use Quick Items Load Process	Select the flag to make the new Quick Items Load process the default load process for the particular catalog and its partners in the system. Checking this makes Use Standard PS Master Map field available. When unchecked the default load items process for the catalog is the current Item Load process (“Step by Step” process). The default for this field is unchecked.

Field or Control	*Description*
Express Catalog	This field is available only when Use Quick Items Load Process is checked. Click to enable the selected catalog to be an Express Catalog, where express catalog items can be loaded into Catalog Management, and indexed into eProcurement Express Items Search Index. “Setting Up and Using the Express Catalog” (PeopleSoft eProcurement)
Use Standard Master Map Template	Select to use the delivered standard Data Source to create Master Data Source and Master Maps for this catalog. The default for this field is unchecked.
Map Name	Select the desired map name. This field is available and a required field when Use Quick Items Load Process is checked. If *Use Standard Master Map Template* is selected, it will be defaulted with **CCM_STD<catalog name>**, where <catalog name> is the first 8 characters of the catalog_id.
Maintain Master map Definition	Click the link to navigate to Master Map Definition page. This link is available if the “Use Quick Items Load Process” flag is selected.

Related Links

Defining Installation Options

Maintain Catalogs - Enterprise Managers Page

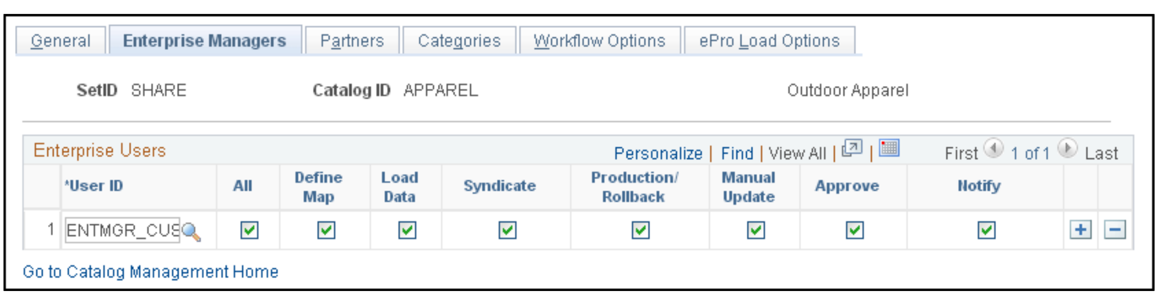
Use the Enterprise Managers page (EOCM_CATALOG_MAN) to assign enterprise managers and grant privileges.

Navigation:

Catalog Management > **Catalog Management Home Page** > **Maintain Catalogs** > **General** > **Enterprise Managers**

Catalog Management > **Catalogs** > **Maintain Catalogs** > **General** > **Enterprise Managers**

This example illustrates the fields and controls on the Maintain Catalogs - Enterprise Managers page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
User ID	Select the enterprise managers assigned to this catalog.
All	Select to grant privileges for all activities. Deselect the box to select activities individually. **Note:** When **All** is selected, the system automatically selects all activities except Notify. Select **Notify** manually if the enterprise manager wants to be notified at the completion of certain processes for which he or she has authorization.
Syndicate	Select to grant privileges to syndicate the production catalog. Syndication is the distribution of the approved production catalog to partners.
Production/Rollback	Select to grant privileges to move the staged version of the enterprise catalog to production, or to roll back a production version of the enterprise catalog to a previous version.
Manual Update	Select to grant privileges to manually enter and change data about partner offerings and enterprise catalog data.
Approve	Select to grant privileges to approve or reject proposed categories and catalog offerings that result from the Categorize Partner Offerings process. A worklist is automatically created for this user.

Note: All enterprise catalog managers are automatically granted browsing privileges to the enterprise catalog and all partner catalogs, both in staged and production status.
Users must also be assigned with the appropriate roles using PeopleTools Security or the they will not have access, despite the selections made here.

Related Links

Defining Roles
Syndicating Catalogs
Moving Catalogs to Production
Approving Categorization Results

Maintain Catalogs - Partners Page

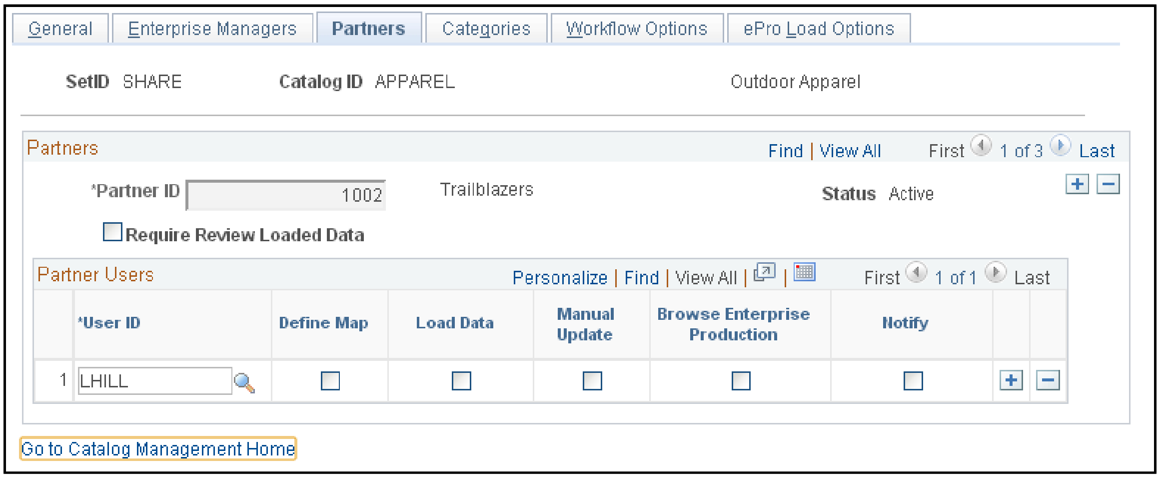
Use the Partners page (EOCM_CATALOG_TP2) to assign partners and grant privileges.

Navigation:

Catalog Management > **Catalog Management Home Page** > **Maintain Catalogs** > **General** > **Partners**

Catalog Management > Catalogs > Maintain Catalogs > General > Partners

This example illustrates the fields and controls on the Maintain Catalogs - Partners page. You can find definitions for the fields and controls later on this page.



Note: The options on this tab change depending on whether the catalog is setup for Quickload or Step by Step. For Step by Step the Categorize, Stage and Browse Enterprise Production options are available.

Field or Control	***Description***
Partner ID	Select the partners assigned to this catalog who will be providing catalog content, viewing catalog content, or both. **Note:** You can only select partners that are registered and have approval for either Provide Catalog Information or View Catalog Information Catalog Management service processes.
Status	Displays the current status of the selected partner, *Active* or *Inactive.* Partners become active when they have registered and have been approved for at least one Catalog Management service process. Their status becomes inactive if they terminate their registration using Maintain Catalog Partners.
Require Review Loaded Data	Select to prevent approvers from initiating the approval process until the corresponding partner has indicated that the loaded data is reviewed. **Note:** This option is not available for Step by Step.
User ID	Select partner users. **Note:** You can only select users that are associated with the selected partner in the Common Registration component.

Field or Control	***Description***
Manual Update	Select to grant privileges to manually enter and change data about partner offerings.
Browse Stage and **Browse Production**	For staging and production catalogs, select to grant privileges to: • Browse the enterprise catalog by offering. • Browse the enterprise catalog by hierarchy.

Note: If a partner is granted privileges to browse enterprise catalogs, data supplied by all partners is accessible. Privileges to browse at the partner catalog level are automatically granted.

Related Links

Registering Catalog Partners
Maintain Partner Data Page
Browsing Staged Offerings
Browsing Production Offerings

Maintain Catalogs - Categories Page

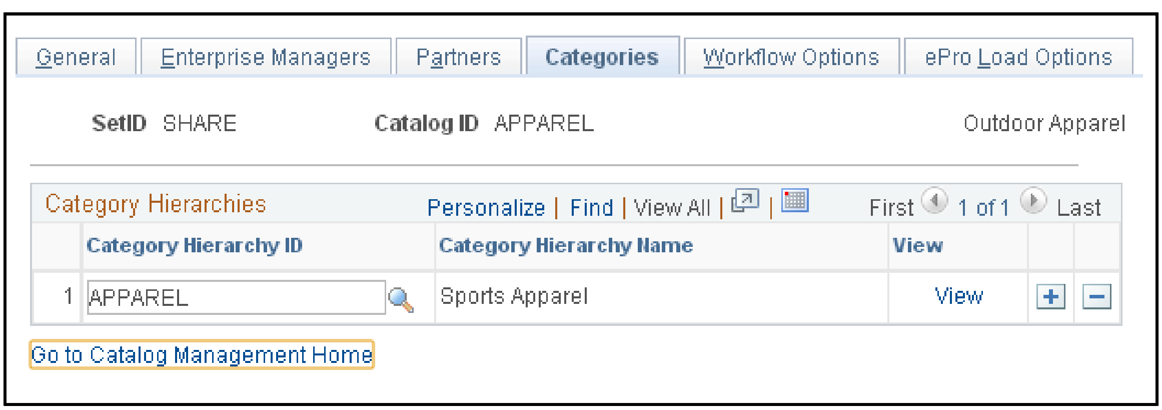
Use the Categories page (EOCM_CATALOG_CAT) to associate category hierarchies.

Navigation:

Catalog Management > **Catalog Management Home Page** > **Maintain Catalogs** > **General** > **Categories**

Catalog Management > **Catalogs** > **Maintain Catalogs** > **General** > **Categories**

This example illustrates the fields and controls on the Maintain Catalogs - Categories page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Category Hierarchy ID	Select category hierarchies for this catalog.
View	Click to view the selected hierarchy in a new browser window.

Related Links

Creating Categories and Category Hierarchies

Maintain Catalogs - Workflow Options Page

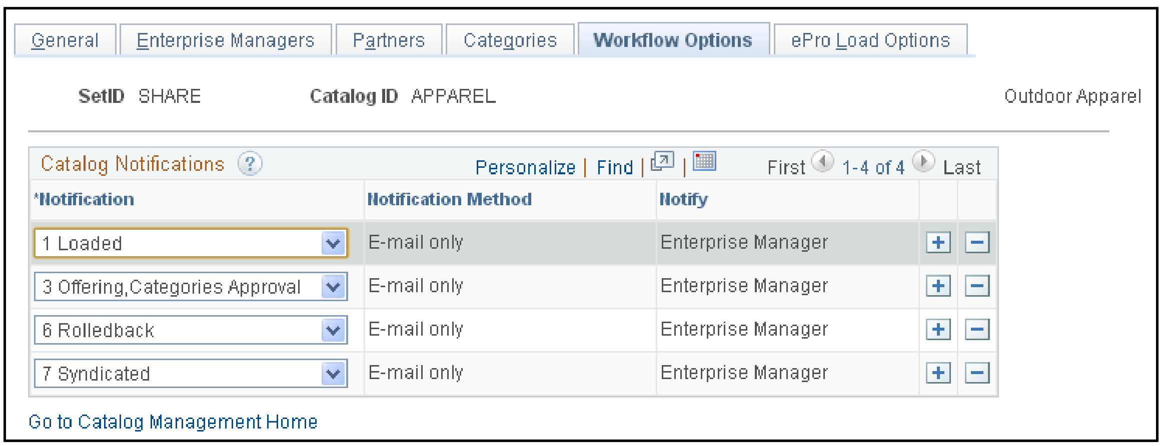
Use the Workflow Options page (EOCM_CATALOG_WORKF) to specify the Catalog Management process stages to notify enterprise managers and partners.

Navigation:

Catalog Management > **Catalog Management Home Page** > **Maintain Catalogs** > **General** > **Workflow Options**

Catalog Management > **Catalogs** > **Maintain Catalogs** > **General** > **Workflow Options**

This example illustrates the fields and controls on the Maintain Catalogs - Workflow Options page.



Note: The options on this tab change depending on whether the catalog is setup for Quickload or Step by Step. For Step by Step, the 2: Categorized, 4: Staged and 5: Move to Production options are available. In addition, workflow notifications require that email and/or worklist options are setup accordingly on the User Profile.
Setting User Profile Attributes

Field or Control	*Description*
Notification	Select the stages of the process to notify users. The method of notification is displayed for each stage that you select. Default notification choices are already selected.

Related Links

[Defining Default Workflow Notifications]

Maintain Catalogs - ePro Load Options Page

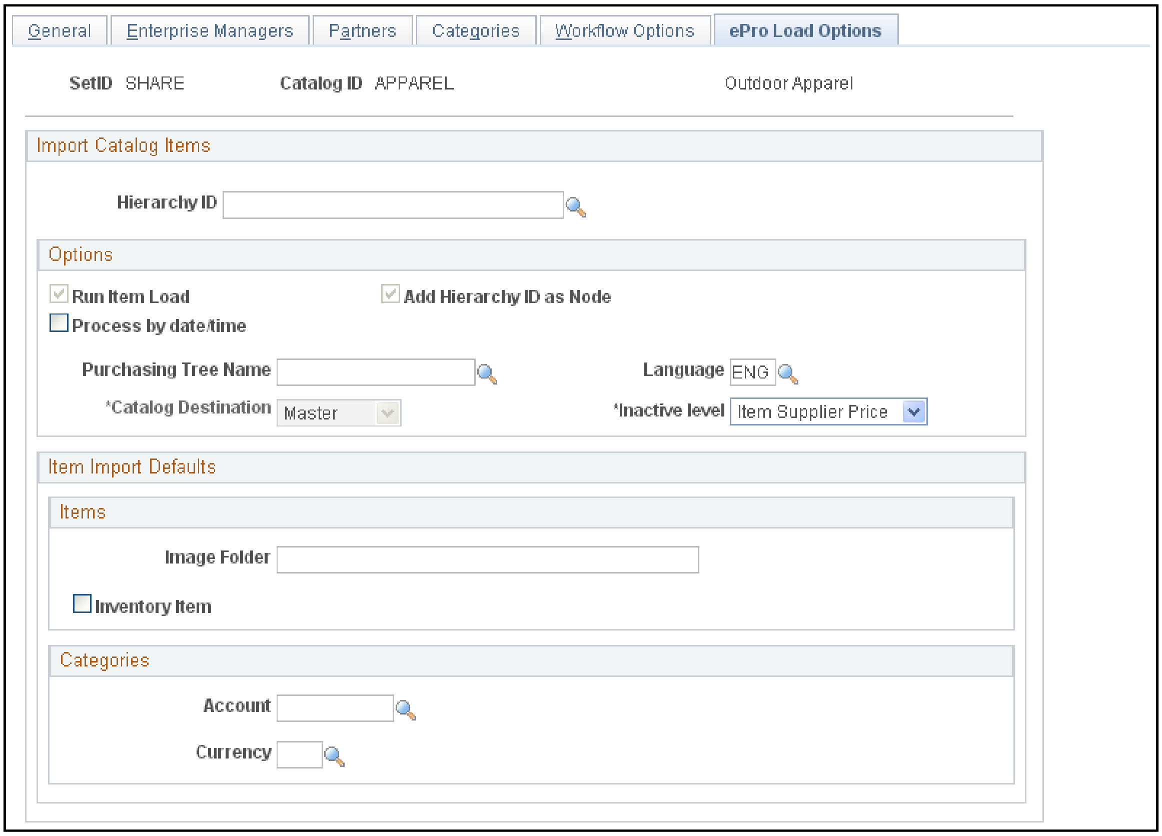
Use the Maintain Catalogs - ePro Load Options (EOCM_CATALOG_EPRO) page to view the load options in eProcurement

Navigation:

Catalog Management > **Catalogs** > **Maintain Catalogs** > **ePro Load Options tab**

Note: The **ePro Load Options** tab is available only if the **Use Quick Items Load Process** flag is selected in the Maintain Catalogs — General page or in the *Installation Options page*.

This example illustrates the fields and controls on the Maintain Catalogs — ePro Load Options Page.



Field or Control	***Description***
Hierarchy ID	Select the desired hierarchy ID from the search list. This is a required field.
Purchasing Tree Name	Select the desired tree name from the search list. This is a required field.

Field or Control	***Description***
Account	Select the type of account from the search list. This is a required field.
Currency	Select the type of currency from the search list. This is a required field.
Catalog Destination	This is pre-defined to *Master*. If the catalog is marked as *Express Catalog*, it will be pre-defined to *Express*.

Chapter 6

Importing Partner Source Files

Defining Catalog Source Layouts

To define the sources for catalog data use the Define Data Source (EOCM_REG_DATA_SRC) component.

This topic provides an overview of data source types. You can use sample files to assist you when defining the layout.

This step requires only to be performed once as long as the format of the partner's source files remains unchanged. This step can be performed by either the partner or an enterprise catalog manager.

Note: Functionality to define shared master catalog sources and allow partners to define their own data sources exists.

Pages Used to Define Catalog Source Layout

Page Name	***Definition Name***	***Usage***
Maintain Catalog Sources page	EOCM_SOURCE_PAGE	Choose to define either a catalog source or a master catalog source.
Maintain Catalog Sources - Source Definition Page	EOCM_DATA_SRC_1	Specify the file format to use to import the partner source catalog data.
Maintain Catalog Sources - Source Fields Page	EOCM_DATA_SRC_2	Specify the fields contained in the source file. Identify character qualifiers for particular fields and characters that should be stripped from the data.

Understanding Data Source Types

Catalog Management supports:

- Flat files
- xCBL
- CIF (Catalog Interchange Format) – Industry standard CSV file format from Ariba.
- CUP (Catalog Update Process) – Microsoft Access Database file from CommerceOne.

Catalog Interchange Format (CIF)

The field names on the Source Fields page of the catalog source will be defined based on the field names defined in the header section of the CIF file. If the field names have not been defined, Catalog Management will use the fields listed below:

Important! An error message will display when you attempt to upload a CIF file that does not have a .cif extension, CIF_I_V3.0 as the first row in the data file, or contains less than 12 columns of data.

Field Name	***Field Type***
Supplier ID	Character
Supplier Part ID	Character
Manufacturer Part ID	Character
Item Description	Character
SPSC Code	Character
Unit Price	Number with Decimal
Unit of Measure	Character
Lead Time	Number without Decimal
Manufacturer Name	Character
Supplier URL	Character
Manufacturer URL	Character
Market Price	Number with Decimal
Additional fields will be automatically created and named sequentially, starting with FIELD1, FIELD2, and so on.	Character

Catalog Update Process (CUP)

The CUP format is only supported if eProcurement is installed. eProcurement users can use the delivered eProcurement Visual Basic executable to export item and price data in a Microsoft Access Database to a flat file. The fields exported are predefined and positioned in the same order as the list below.

Note: You must export the Microsoft Access Database Products file, which contains both product and price information.

The field names are automatically created on the Source Fields page of the catalog source, and are disabled to prevent users from making changes.

Field Name	***Field Type***	***Length***
CUP_PartUpdateID	Number	10
CreateDate	Date	10
ActionCode	Character	5
Cup_Supplier PartnerID	Number	5
TPID	Character	50
TPName	Character	100
PartNum	Character	50
PartNumExt	Character	50
UOM	Character	12
UnitPrice	Number	10.5
MfrPartNum	Character	50
MfrName	Character	50
CatLevel1	Character	120
CatLevel2	Character	120
CatLevel3	Character	120
CatLevel4	Character	120
AcctLevel1	Character	2

Field Name	***Field Type***	***Length***
AcctLevel2	Character	2
AcctLevel3	Character	2
AcctLevel4	Character	2
LeadTime	Number	11
CurrencyCode	Character	3
EffectiveDate	Date	10
QtyMin	Number	11
ShortDesc	Character	254
LongDesc	Character	254

Maintain Catalog Sources - Source Definition Page

Use the Define Catalog Source - Source Definition page (EOCM_DATA_SRC_1) to specify the file format to use to import the partner source catalog data.

Navigation:

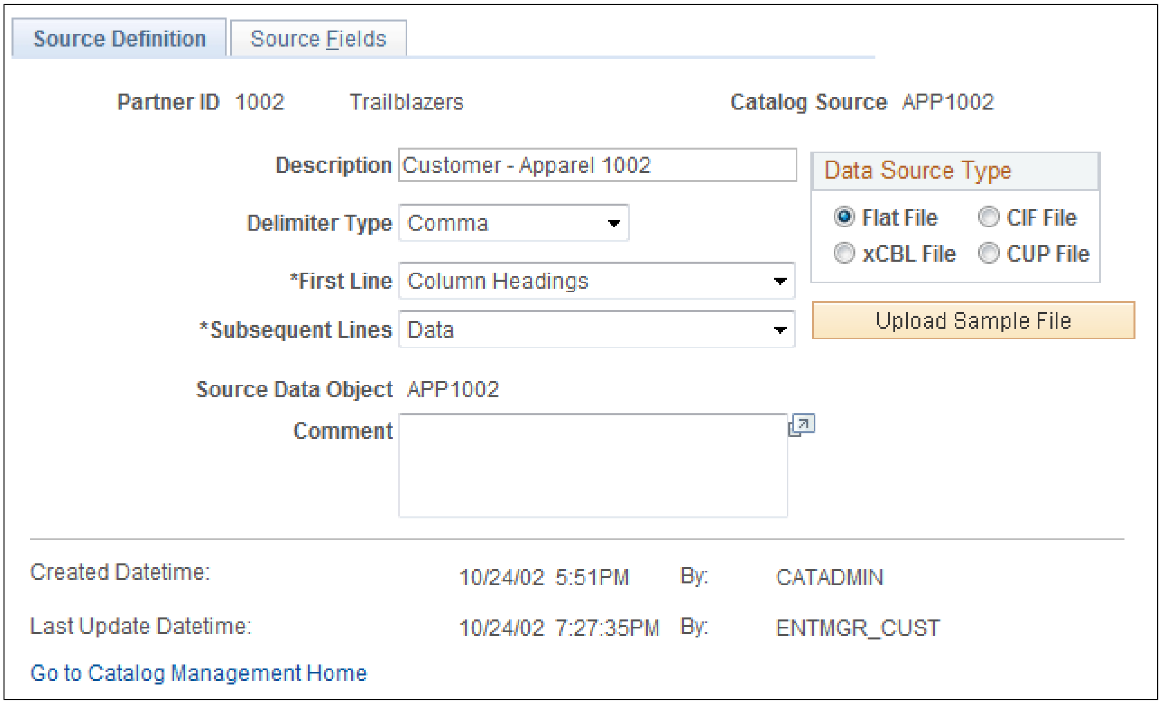
Catalog Management > **Catalog Management Home Page** > **Maintain Catalog Source**

Select the **Define Catalog Source** link located on the Maintain Catalog Source page.

Catalog Management > **Catalogs** > **Maintain Catalog Sources**

Select the **Define Catalog Source** link located on the Maintain Catalog Source page.

This example illustrates the fields and controls on the Maintain Catalog Sources - Source Definition page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Partner ID and **Catalog Source**	These two values combined form a unique ID for the catalog source file.
Delimiter Type	Select the delimiter type used to separate each field value in this file. Choose from *Comma, Semi Colon, Space, Tab, Fixed Length, Other.* If *Other* is selected, a new field appears for you to enter the delimiter value, such as: % or $. If *Fixed Length* is selected, the Upload Sample File button is hidden, and the user must manually define the fields on the Maintain Catalog Sources - Source Fields page. **Note:** You can select a value for flat files only. The field is disabled with the value *Comma* preselected for CIF and CUP files. The field is not visible for xCBL files.
First Line	Specify if the first line of the file contains headings or data. If you select *Headings,* the values located in the first line of the uploaded sample file become the field names. If you select *Data,* the field names need to be added manually on the Maintain Catalog Sources - Source Fields page. **Note:** You can select a value for flat files only. The field is disabled with the value *Headings* preselected for CIF files and *Data* preselected for CUP files. The field is not visible for xCBL files.

Field or Control	***Description***
Subsequent Lines	Specify if subsequent lines of the file contain data or nothing. Data is used for determining the field type and length from the sample file. **Note:** You can select a value for flat files only. The field is disabled with the value *Data* preselected for CIF and CUP files. The field is not visible for xCBL files.
Source Data Object	Enter a unique name, up to 30 characters. For example, use the partner ID and catalog source, such as 1001_ OFFICESUPPLIES. This field creates a source data object for Data Transformer and is used as a source for the catalog map definition.
Flat File, xCBL, CIF, or **CUP**	Select the file type.
By	Displays the user ID of the person who created or updated this catalog source.
Created Date Time and **Last Update DateTime**	Displays the date and time that this catalog source was created and updated.
Upload Sample File	Click to upload a sample file. A page appears to enter the navigation path to the location of the sample file. Click **Upload.** The system reads the file and determines the format of the fields. When complete, the Maintain Catalog Sources - Source Fields page is displayed with the source field definitions. Alternatively, navigate to the Maintain Catalog Sources - Source Fields page and add rows to reflect the structure of the file.

Maintain Catalog Sources - Source Fields Page

Use the Define Catalog Source - Source Fields page (EOCM_DATA_SRC_2) to specify the fields contained in the source file.

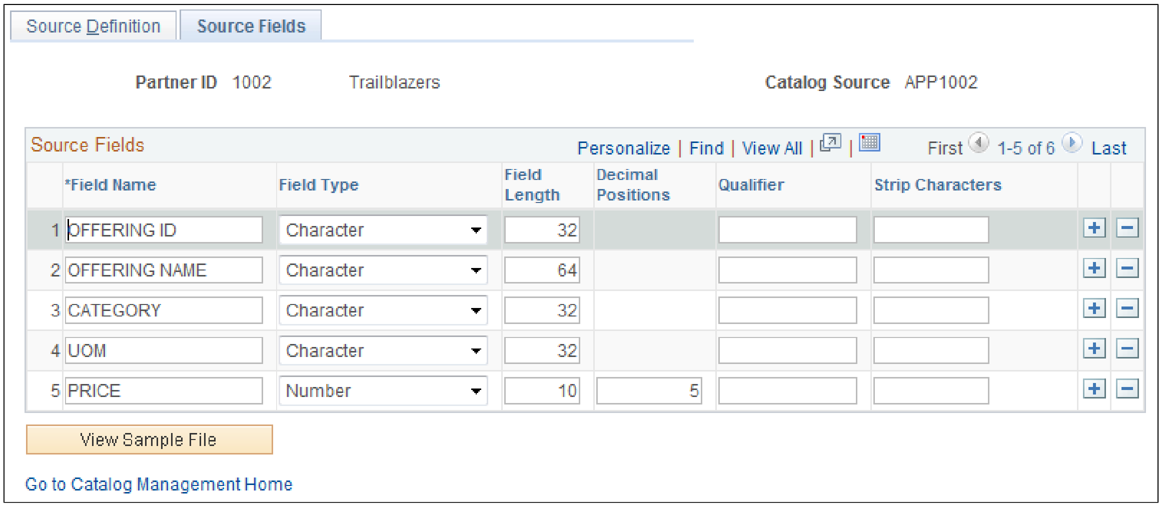
Identify character qualifiers for particular fields and characters that should be stripped from the data.

Navigation:

Catalog Management > **Catalog Management Home Page** > **Maintain Catalog Source** > **Define Catalog Source** > **Source Definition** > **Source Fields**

Catalog Management > **Catalogs** > **Maintain Catalog Sources** > **Define Catalog Source** > **Source Definition** > **Source Fields**

This example illustrates the fields and controls on the Maintain Catalog Sources - Source Fields page. You can find definitions for the fields and controls later on this page.



Note: Source field information is automatically completed when the sample source file is uploaded. However, the information can be changed or entered manually.

Field or Control	***Description***
Field Name	Enter the field name for each column of data. This information is extracted from the first line of the sample file, if you indicated that the file contains headings. **Note:** This field is read-only for xCBL files.
Field Type	Select the field type for each column of data. Choose from *Character, Date, DateTime, Number, Signed Number,* and *Time.*
Field Length and **Decimal Positions**	Enter the field length for each column of data. For number fields, include decimal positions.
Qualifier	Specify a character as a qualifier for a field. For example, if the format of the file is comma-separated value (CSV), and the item description field contains data with embedded commas, it can be qualified by enclosing the data in quotes. In this case the " character is the qualifier. When the data is imported, the item description is imported with the embedded commas. **Note:** It is recommended that you use the double quotation marks (") as the qualifier.

Field or Control	***Description***
Strip Characters	Specify characters to strip from a field. For example, if a price field has data starting with a $ sign, the user specifies the $ character in this field. During the import process, the $ character is stripped from the price data. The user can specify multiple characters for each data field.
View Sample File	Select to view the sample file. A new browser window opens with the content of the file. **Note:** This button is hidden if the delimiter type is *fixed length.*

Attachments and Images

To utilize all the benefits of the attachments and images feature, you will need to define a catalog source layout with the addition of four new fields that must be mapped to these enterprise catalog fields:

- File Name.
- File Extension. (Image extensions can be BMP, RLE, GIF, JPEG, JPG, TIF, or PCX).
- File Path.
- URL. (Required if you are creating a link to the partner's website).

The following figure shows the fields in the partner source data file that contains the name of the attachment files, their extension names, and the path to their location.

The fields in the partner source data file that contains the name of the attachment files, their extension names, and the path to their location

CATALOG#	DESCRIPTION	UNSPSC CODE	UNSPSC DESCF	UM	VENDOR NAME	VENDOR CAT #	PRICE	Filename	Extension	Path	URL
300101	Tri Bike	42281000	Tricycles	EA	TOYS & BIKES	1815A	100.99	tricycle	JPG	attach/	http://www.onewheels.com
300101	Tri Bike	42281000	Tricycles	PR	TOYS & BIKES	1815A	200	tricycle	JPG	attach/	http://www.onewheels.com
200345	Child Bike	41121203	Bicycles	EA	TOYSR4U	430766	249.99	childbike	JPG	attach/	http://www.onewheels.com
200345	Child Bike	41121203	Bicycles	PR	ADVENTURES II	22 36 320 4	345.49	childbike	JPG	attach/	http://www.onewheels.com
100420	Mountain Bike	41121203	Bicycles	EA	ADVENTURES II	22 36 361 1	234.98	mtnbike	JPG	attach/	http://www.onewheels.com
100203	Mountain Bike	41122400	Road and Mount	EQ	RACERS	HX15997	523.5	mtnbike	JPG	attach/	http://www.onewheels.com
100336	Mountain Bike	41122400	Road and Mount	EA	DRAKES BIKES	5954	255	mtnbike	JPG	attach/	http://www.onewheels.com
100336	Mountain Bike	41122400	Road and Mount	PR	DRAKES BIKES	6212	322.75	mtnbike	JPG	attach/	http://www.onewheels.com
100190	Mountain Bike	41121203	Bicycles	EA	FAST WHEELS	1000 1L	234.98	mtnbike	JPG	attach/	http://www.onewheels.com
100650	Mountain Bike	41121203	Bicycles	PR	GO4IT	14000 100	543.55	mtnbike	JPG	attach/	http://www.onewheels.com

To avoid duplicate entries, the system assigns the **Supplier Item ID** and **UOM** fields as pseudo key fields. To allow for the association of multiple attachments to a single offering, the system also assigns the field File Name as a pseudo key field.

When the catalog source layout is defined, import the partner source data file. No changes have been made to the import process. Once imported, the data is available to be transformed and loaded into the enterprise catalog.

Defining Master Catalog Source Layouts

This topic provides an overview of master data source and map concepts, and discusses how to define master catalog sources.

Pages Used to Define Master Catalog Sources

Page Name	***Definition Name***	***Usage***
Maintain Catalog Sources - Source Definition Page	EOCM_DATA_MST	Specify the file format to use to import the partner source catalog data.
Maintain Catalog Sources - Source Fields Page	EOCM_DSMST_FLDS	Specify the fields contained in the source file. Identify character qualifiers for particular fields and characters that should be stripped from the data.
Source Partners Page	EOCM_DSMST_PRT	Identify the partners that will share this master catalog source layout.

Understanding Master Catalog Source and Map Concepts

Using one master catalog source layout and one related master catalog map for multiple partners allows customers to standardize the format that partners must use to transmit catalog offerings. In turn, a standardized format prevents customers from having to create and maintain several sources and map definitions, which can be very time-consuming and costly.

A master catalog source and related master map will provide the ability to:

- Share a master catalog source definition among multiple partners across catalogs.
- Share a master source data object with multiple partners.
- Share a master map definition.
- Use a unique catalog source and master map, for one or multiple partners.

Note: Functionality to allow partners to define their own catalog sources and map definitions also exists.

Source Partners Page

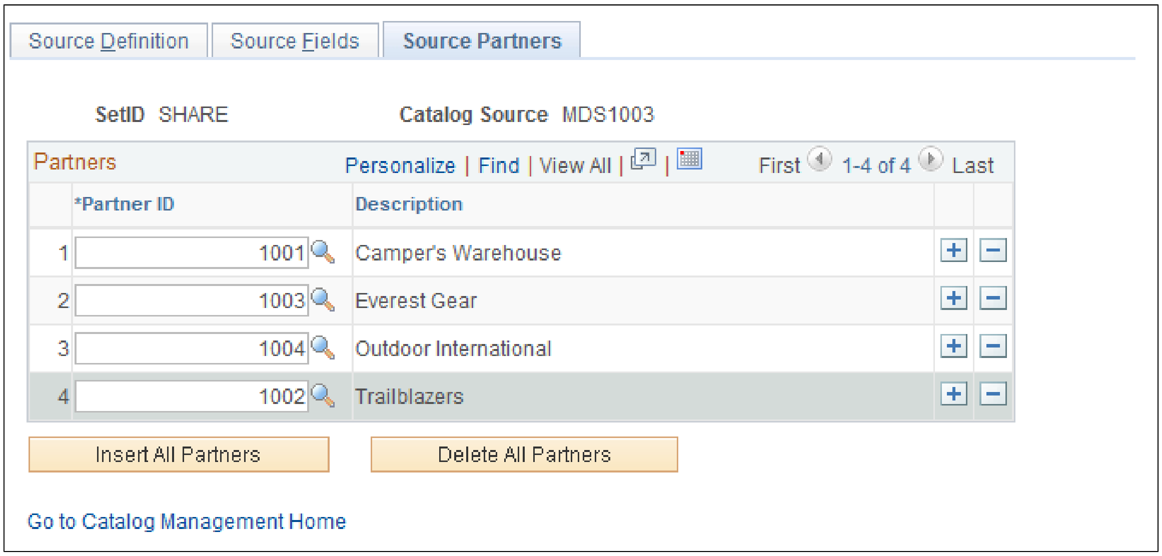
Use the Define Master Catalog Source - Source Partners page (EOCM_DSMST_PRT) to identify the partners that will share this master catalog source layout.

Navigation:

Catalog Management > **Catalog Management Home Page** > **Maintain Catalog Source** > **Define Master Catalog Source** > **Source Definition** > **Source Partners**

Catalog Management > Catalogs > Maintain Catalog Sources > Define Master Catalog Source > Source Definition > Source Partners

This example illustrates the fields and controls on the Source Partners page.



The source definition page used to define a master catalog source, is similar to the source definition page used to define a catalog source for a single partner. The only difference is the way partners are associated to the source format. When defining a catalog source for a single partner the key fields are SetID, partner ID, and Catalog Source. Values for these fields are entered on the Search page. When defining a master catalog source the key fields are SetID and Catalog Source. Partners who will share this source format are identified on the Source Partners page.

To identify partners:

1. Go to the Source Partners page.
2. Add the partners that will share this source layout.

   Click the **Insert All Partners** button to automatically add all partners registered in Catalog Management. Click **Delete All Partners** to remove all partners from the list.
3. Click **Save** to capture changes.

Importing Source Data

This topic discusses source data import process, and viewing and correcting errors.

Note: This activity can be performed by a partner if the partner has privileges assigned.

Pages Used to Import Source Data

Page Name	***Definition Name***	***Usage***
Import Catalog Sources Page	EOCM_IMPORT_PAGE	Choose to import either catalog sources or a master catalog source.
Import Catalog Sources Page	EOCM_DS_LOAD_1	Import partner offering data from a partner source file.
Import Master Catalog Sources page	EOCM_DS_LOAD_M	Import partner-offering data using a shared catalog source definition.
Import Status Details page	EOCM_DS_STATUS_SEC	View detail import process information for a particular file.
Data Source Import Error Details Page	EOCM_DS_ERR_SEC	View details of errors that occurred during the import process.
Manage Errors Page	EOCM_CATWRKBCH_CMP	View details of errors occurred and a list of methods to correct them.

Related Links

Maintain Catalogs - Partners Page

Understanding the Source Data Import Process

When a partner changes a source file, such as adding new offerings, deleting offerings, or updating prices, the catalog management business process flow cycle begins. It starts with the process of importing the updated source file into a temporary table in Catalog Management. Once imported, the data is available to be transformed and loaded into the enterprise catalog.

Managing Errors

The system allows the import process to run to completion even if errors are encountered. The system captures the error information and presents the user with the following set of options:

- Delete the error rows for a specified file.
- Delete all the imported data for a specific file.
- Export error rows to an external .txt file, correct the errors in this file, and then re-import the file by appending it to the previously imported data.

Import Catalog Sources Page

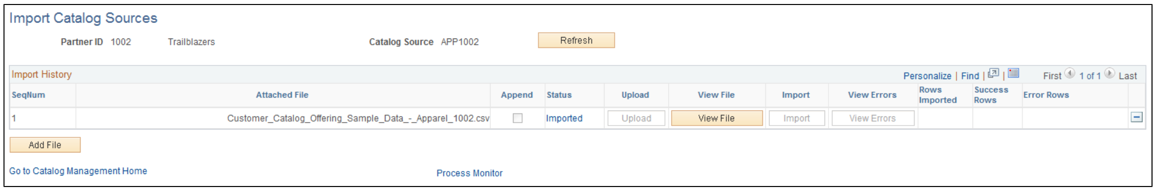
Use the Import Catalog Sources page (EOCM_IMPORT_PAGE) to choose to import either all catalog sources or a master catalog source.

Navigation:

Catalog Management > **Catalog Management Home** > **Import Catalog Source**

Catalog Management > **Catalogs** > **Import Catalog Source**

This example illustrates the fields and controls on the Import Catalog Sources page. You can find definitions for the fields and controls later on this page.



This page shows the import history for the selected partner ID and catalog source. From this page you can view or delete previously imported data files, or add a new file to be imported.

Field or Control	***Description***
Partner ID and **Catalog Source**	Values are based on the source layout you selected on the Import Catalog Sources Search page.
Append	Select to append additional files to the associated file. **Note:** The check box will be disabled for files that are imported successfully.
Status	Click the link to go to the Import Status Details page and view more detailed information about the status of the import process. See Import Catalog Sources Page.
Upload	Click to upload the source file. Use the browse button to locate and select the desired file. Once selected, the path to the file is displayed. Click the **Upload** button to upload the file and return to the Import Catalog Sources page. The name of the selected file appears in the **Attached File** field, and the status of the file is *Uploaded.* **Note:** The **View File** and **Import** buttons are now active.
View File	Click to review the contents of the source file.

Field or Control	***Description***
Import	Click to import the offering data into Catalog Management. A process request is submitted. Click the **Process Monitor** link to monitor the status of the request. The status of the file changes to *Imported* when the file has been successfully imported. Click the **Refresh** button to update the status. **Note:** This button becomes inactive once the file is imported.
View Errors	If an error occurs, the status is updated to *Error* once you click the **Refresh** button. Click to view and correct import errors.
Rows Imported, Success Rows and **Error Rows**	Displays the total number of rows imported, the number of rows imported successfully, and the number of rows that caused errors.
Add File	Click to add a new row. The next sequence number appears in the **SeqNum** field.

Note: The import process leverages PeopleTools file attachments, which can be configured to use either the FTP or HTTP transfer protocol. File attachments are supported by using PeopleCode built-ins that implement the transfer of a file to or from a browser using the application server.

Import Status Details

Use the Import Status Details page (EOCM_DS_STATUS_SEC) to view detail import process information for a particular file.

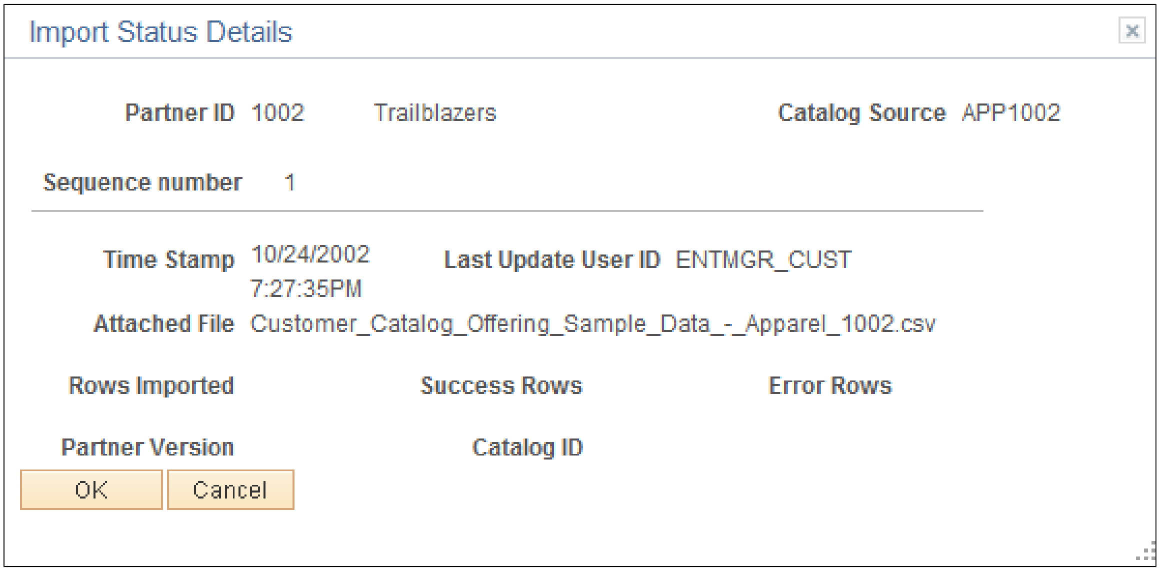
Navigation:

Catalog Management > **Catalog Management Home Page** > **Import Catalog Source**

Catalog Management > **Catalogs** > **Import Catalog Sources**

Click the **Status** link located on the Import Catalog Sources page.

This example illustrates the fields and controls on the Import Status Details page.



Use the Import Status Details page to view more detailed import process information for the selected file.

See the product documentation for *PeopleTools: Process Scheduler*

Related Links

Defining Catalog Source Layouts

Import Catalog Sources Page

The process of a master catalog source definition is similar to the process users use for importing partner-offering data using a catalog source definition for a single partner. The only difference is when a user selects the catalog source to import. In the master catalog source situation, the same catalog source may be listed multiple times in the search results.

To select a master catalog source to import:

1. Access the Import Catalog Sources page.
2. Click the **Import Master Catalog Source** link.

   The Import Master Catalog Source search page appears.
3. Select the desired master catalog source file by SetID, partner ID, and catalog source.

   If multiple partners have been identified to share a specific master catalog source, that source file will be listed multiple times in the search results.

Data Source Import Error Details Page

Use the Data Source Import Error Detail page (EOCM_DS_ERR_SEC) to view details of errors that occurred during the import process.

Navigation:

Catalog Management > **Catalog Management Home Page** > **Import Catalog Source**

Catalog Management > **Catalogs** > **Import Catalog Sources**

Click the View Errors button.

Field or Control	***Description***
Partner ID, Catalog Source and **Sequence Number**	Values are based on the information from the Import Catalog Sources page.
Line Number	Displays the row in the source file where the error occurred.
Field Name	Displays the name of the field that caused the error.
Text	Describes the error.
Delete Errors	Select to delete error rows from a specific imported file.
Remove Imported Data	Select to remove all the imported data from a specific file.
Export Error Data	Select to export the error rows to a flat file. **Note:** Once exported, you can make corrections, and then re-import the data using the **Append Data** feature. The corrected data will be appended to the rows that were imported successfully.

See the product documentation for *PeopleTools: PeopleCode Language Reference* and *PeopleTools: PeopleCode Developer's Guide*

Managing and Correcting Errors

This section provides an overview of how to manage errors, and the methods of correcting them when Quick Item Load process is used.

Errors are managed using the Manage Errors page, based on the process and whether it for Administrator or Partner. The Manage Errors page looks different for the import process and the load map process.

Error Handling in the Quick Item Load Process

The Quick Item Load Process centralizes all of the steps and processes needed to load items through Catalog Management into eProcurement. All processing is done through the Manage Catalogs Workbench. This provides a centralized location from which all error handling is achieved. All methods of error correction are accessible through the Manage Catalogs Workbench.

Error Details

When an error is received, the Load Stage status shows as **Error** in the Catalog Workbench. The Error Details page is accessed by clicking on the **Error** link from the Catalog Workbench or the **Review Load Errors** icon in the timeline.

Clicking on the link opens a modal page called Manage Errors page. The details of errors can be obtained on this modal page, which include the type of error that occurred, the number of error lines, the field where the error occurred, and any additional error text when available.

The Manage Errors page is generated separately for the **Load Map Process** and the **Import Process**, depending on permissions for the Partner or the Administrator. A drop-down menu helps to select various methods of correcting an error depending on the type of error received.

Related Links

Defining Catalog Management Workbench

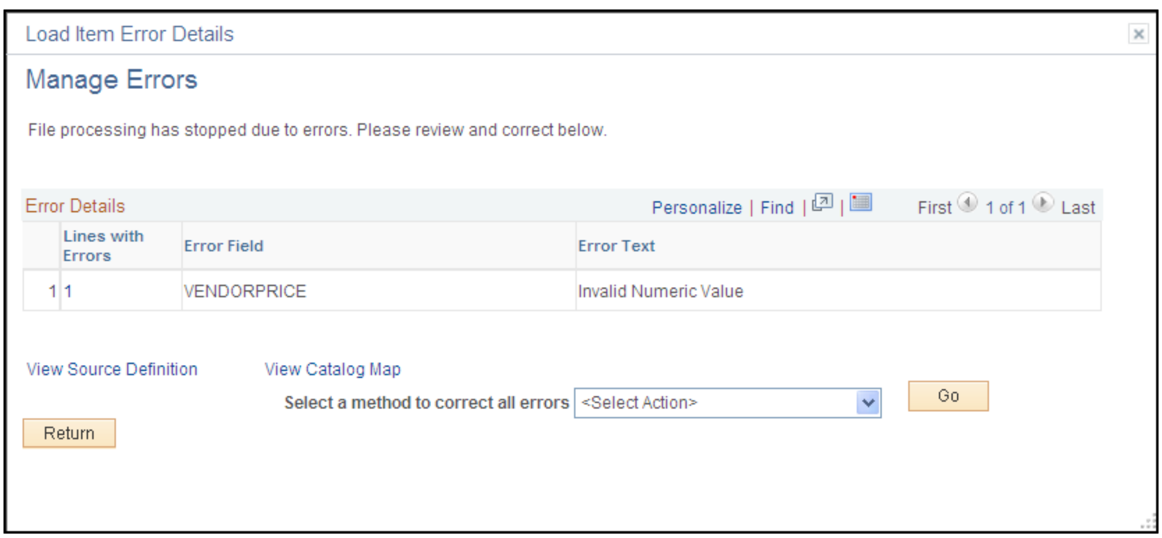
Manage Errors Page

Use the Manage Errors page (EOCM_CATWRKBCH_CMP) to view details of errors occurred and a list of methods to correct them.

Navigation:

Catalog Management > **Catalogs Workbench** > **click on Review Load Errors icon** > **click the Errors link**

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



Field or Control	***Description***
Lines with Error	Click on a value to display a modal page with more information on the specific lines that are in error, with error details.

Field or Control	***Description***
Error Correction method	Select from the options to decide a method to correct the error: • *Correct Errors Online*: Select this option to open a modal page and correct errors online. *View File link*: Click to open the source file for viewing in a separate window. *Delete Selected*: Click to delete the selected row. *Delete All link*: Click to delete all rows. *Save*: Click to save the changes in progress and return at a later time. *Clear Changes*: Click this to remove all the changes you have to the error rows. All fields in error are to be corrected before processing can continue; partial processing does not occur. If all error fields are not populated with a new value, a message appears stating that error fields still exist and are required to be corrected before resuming processing. • *Export All Rows to a File*: Select to export all rows to a file. A message is displayed showing where the file is exported. The exported file will have an extra column called **Error**, and the rows in error will have a value in the new **Error** column. • *Export Error Rows to a File*: Select to export error rows to a file. • *View Input File*: Select to open a modal window and display the input file that is in current functionality to review the file for errors. In order to make changes to the file, access the file from the location it is stored.
View Source Definition	Click to open the Master Data Source Definition page. Partners can view the definition in display only mode. A message appears that for making changes to the source definition, the partner may have to contact the administrator. **Note:** Only Administrators can make changes to the source definition.
View Catalog Map	Click to open the Catalog Mgmt Map Defn modal page. Partners can view the map in display only mode. A message appears that for making changes to the catalog map, the partner may have to contact the administrator. **Note:** Only Administrators can to make changes to the catalog map.

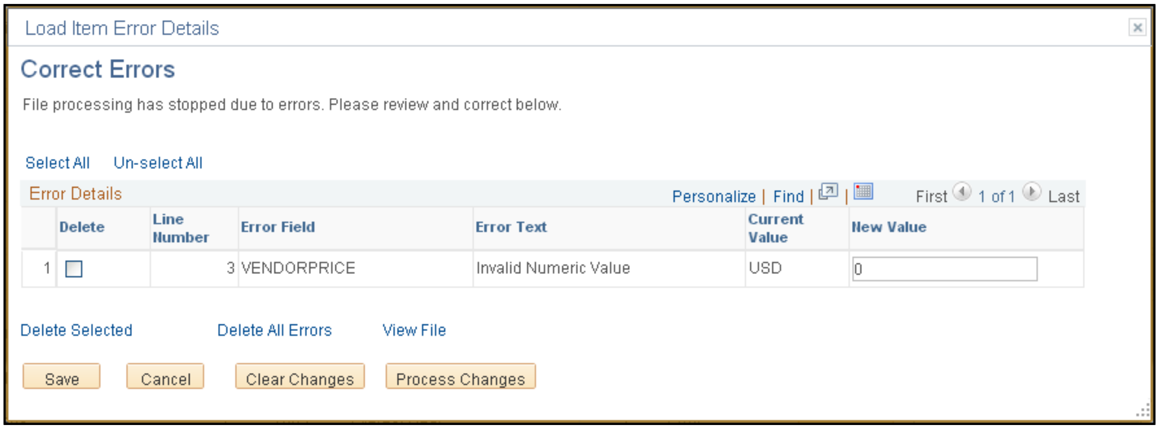
Correct Errors Online

Use the Correct Errors Online page (EOCM_ERR_CORR_SEC) to correct errors online, after selecting the method from the Manage Errors page.

Navigation:

On the Manage Errors page, select the method **Correct Errors Online** and click Go.

This example illustrates the fields and controls on the Correct Errors Online page.



Import Catalog Source Errors and Correction Options

This section discusses how to import catalog sources and the ways to use correction options.

Load Catalog Map Errors and Correction Options

Error Handling For Abends

There may be certain cases where the system is unable to manage errors and a process abends. When there is an abend the status goes to Error. When a user clicks on the link, a modal window appears with a link to the process monitor. A text message displays that the processing encountered an error and may be resolved after checking the error details in the process monitor.

Errors of type Unit of Measure (UOM) and Currency

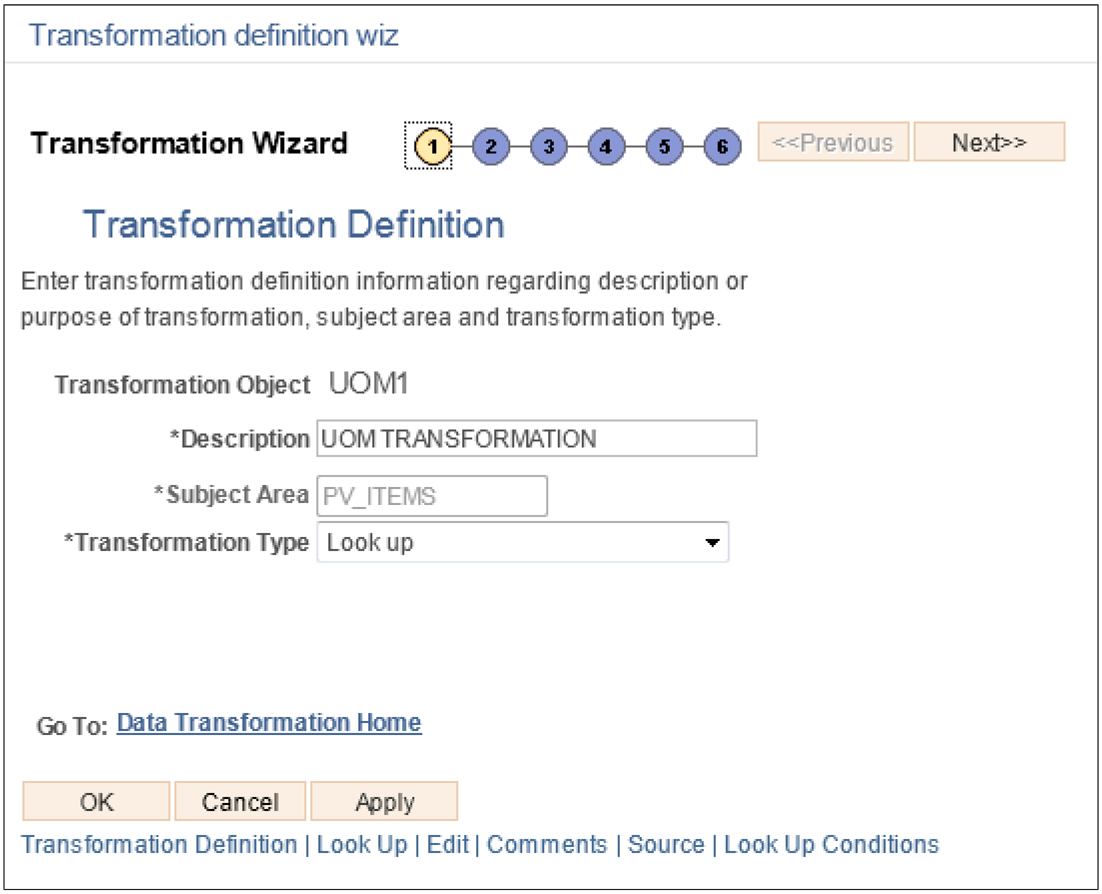
To allow for validation of currency and unit of measure in the item file, users should select the **Correct data error & reprocess** option on the Map Information page. Data Transformation is to be set up for **Currency and UOM** fields on the Map Field Detail tab. This setup is to avoid the possibility of invalid currency and/or UOM values loading into the production tables, which could generate validation errors during the subsequent eProcurement CUP load processing. CUP validation errors must be corrected either on Validate and Process Imported Items page in eProcurement, or on Item Load Errors page in Inventory.

Setting Up UOM and Currency Transformations

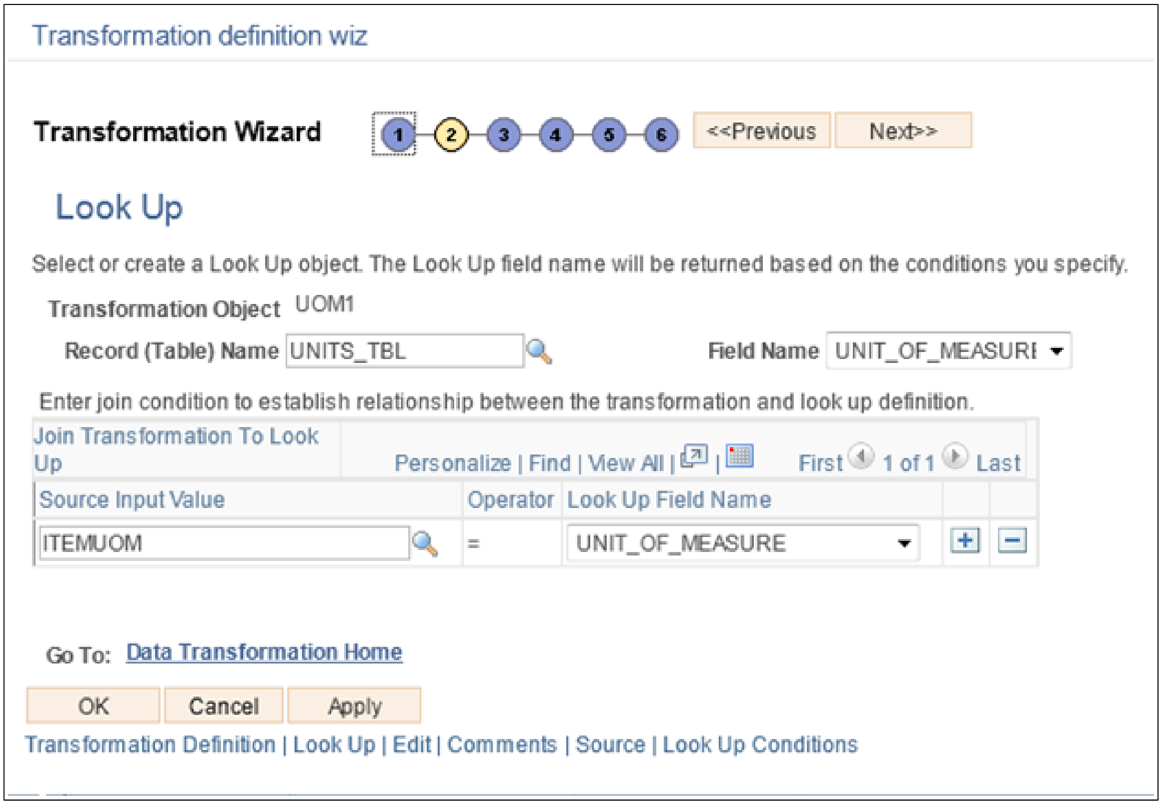
Setting Up UOM and Currency Transformations is a process in six steps each for UOM and Currency Transformations. For the first three steps, user must enter the desired description and select relevant values from the fields as per the examples given. The rest of the steps can be followed with default data populated on the screens.

Use the Transformation Definition Wizard page to setup UOM and Currency Transformations.

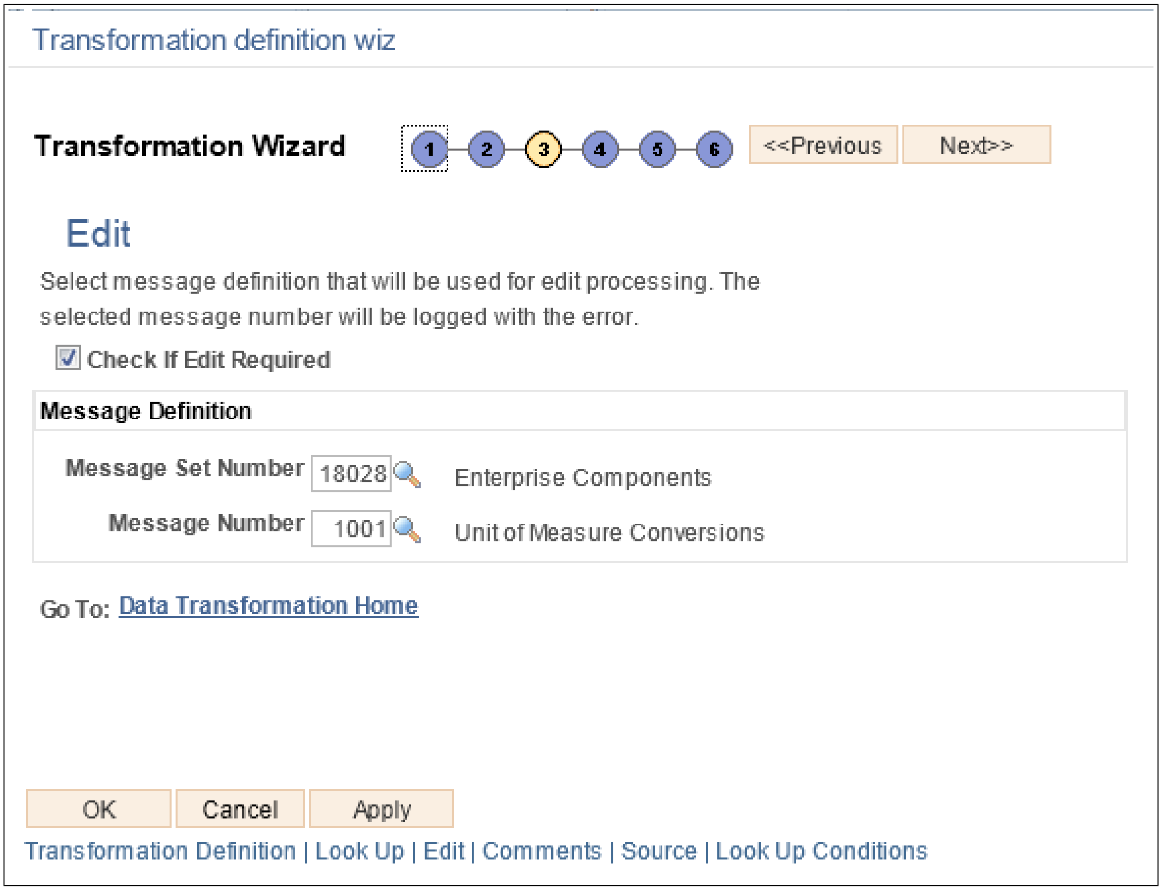
This example illustrates the fields and controls on the Transformation Definition Wizard (1 of 3).



This example illustrates the fields and controls on the Transformation Definition Wizard (2 of 3).

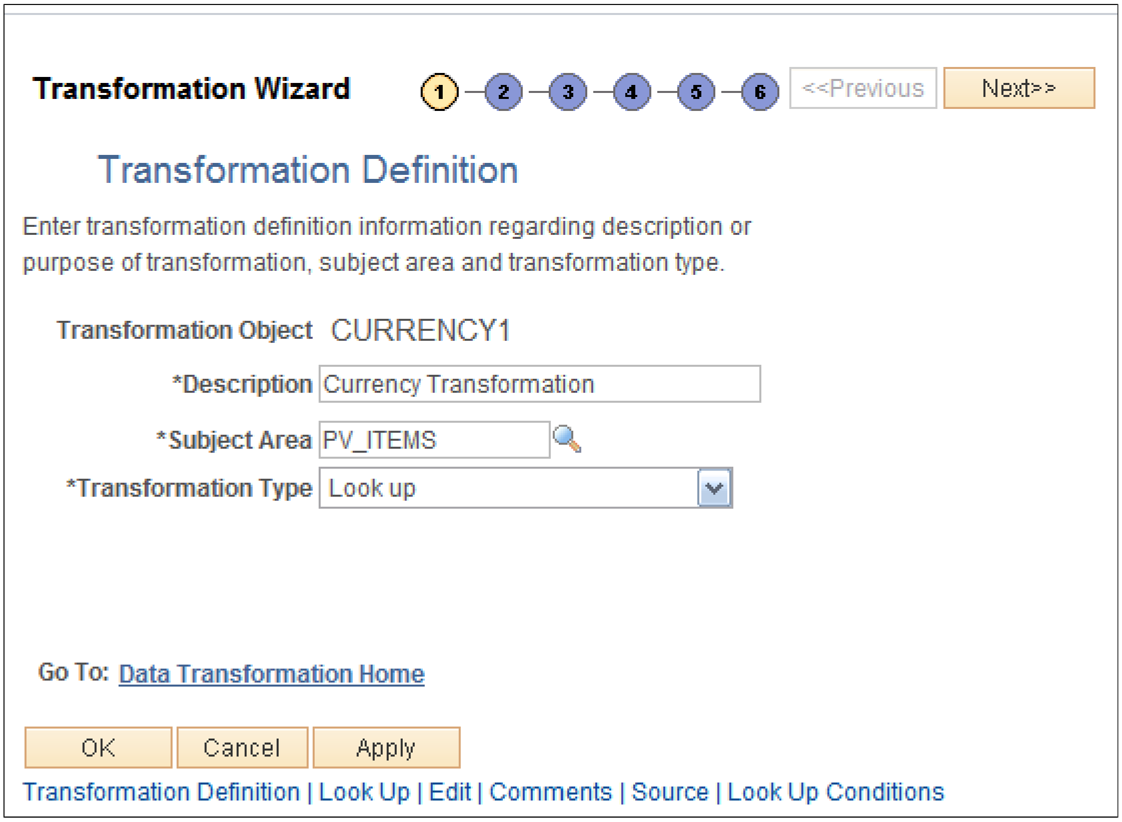


This example illustrates the fields and controls on the Transformation Definition Wizard (3 of 3).

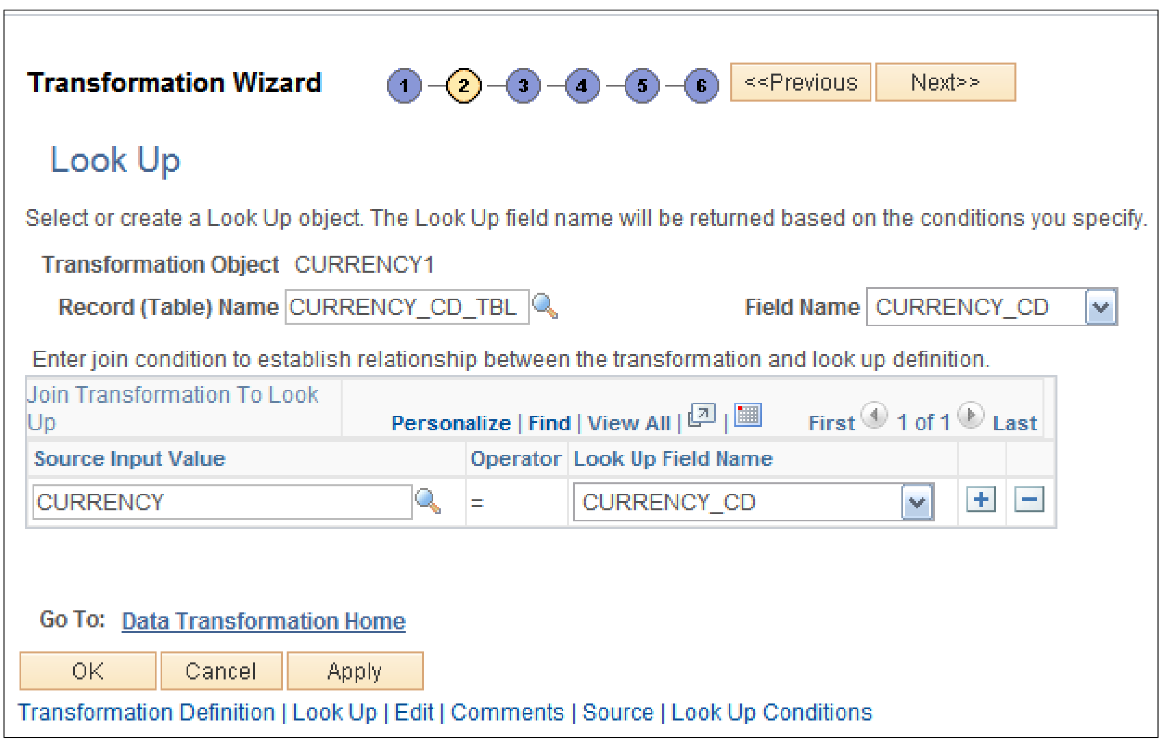


Currency Transformation

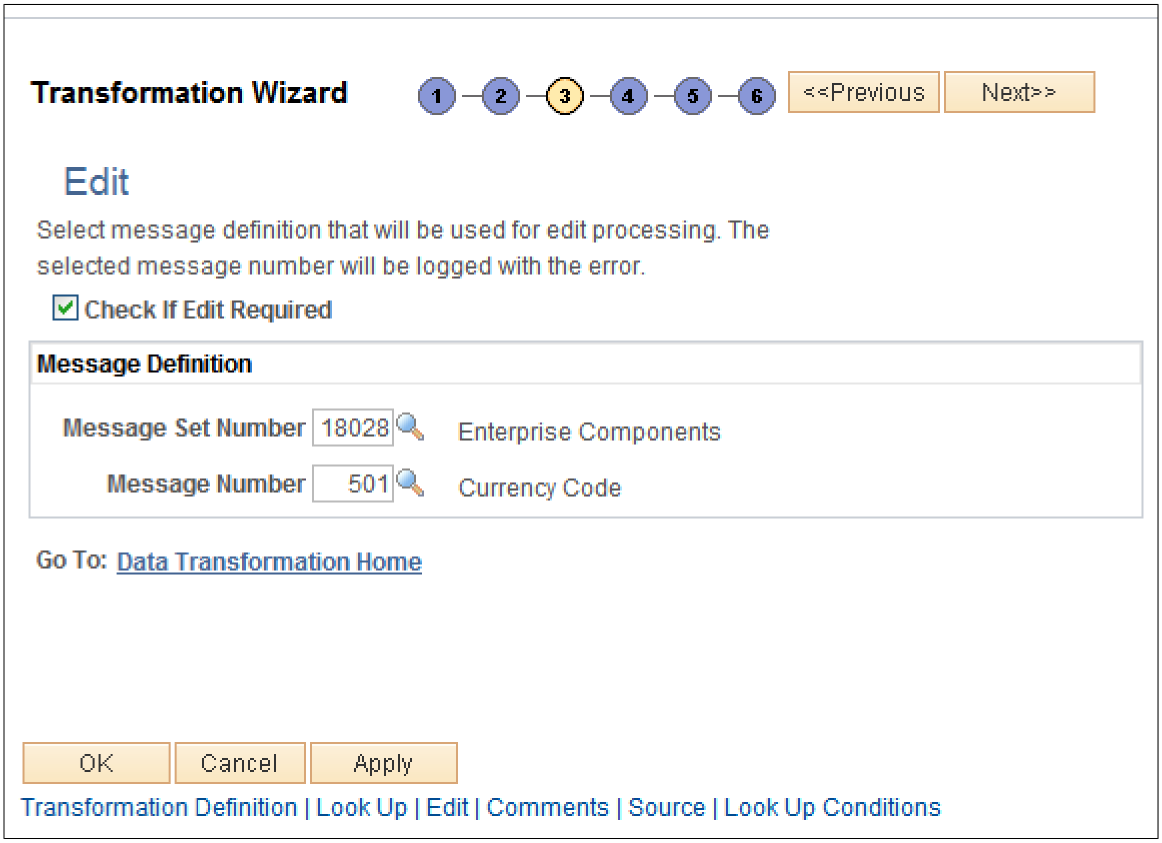
This example illustrates the fields and controls on the Currency Transformation Wizard (1 of 3).



This example illustrates the fields and controls on the Currency Transformation Wizard (2 of 3).



This example illustrates the fields and controls on the Currency Transformation Wizard (3 of 3).



Chapter 7

Mapping, Transforming, and Loading Partner Source Data

Defining Catalog Maps

To define catalog maps, use the Define Catalog Maps (EOCM_MAP_DFN) component.

This topic discusses the mapping process and master maps.

Note: This step need only be performed once as long as the format of the partner's source files or the enterprise target layout do not change.

Pages Used to Define Catalog Maps

Page Name	*Definition Name*	*Usage*
Define Catalog Map - Map Information Page	EOEW_MAP_DFN	Enter general mapping information.
Define Catalog Map - Map Field Detail Page	EOEW_MAP_FLD	Enter field-level mapping definitions.
Map Edit Page	EOEW_MAP_EDIT	Edit map source input values used in transformation sets.
Preview Map Results Page	EOEW_TARPREVIEW	View a subset of the data based on the defined map.
Define Catalog Map - Comments page	EOEW_MAP_COMMENT	Enter comments related to this map definition.
Define Master Catalog Map - Map Information page	EOEW_MAP_DFN	Enter general mapping information.
Define Master Catalog Map - Map Field Details page	EOEW_MAP_FLD	Enter field-level mapping definitions.
Define Master Catalog Map - Map Edit page	EOEW_MAP_EDIT	Edit map source input values used in transformation sets.

Page Name	***Definition Name***	***Usage***
Define Master Catalog Map - Preview Map Results page	EOEW_TARPREVIEW	View a subset of the data based on the defined map.
Define Master Catalog Map - Comments page	EOEW_MAP_COMMENT	Enter comments related to this map definition.

Understanding the Mapping Process

Catalog mapping translates values from the catalog source data to the format of the enterprise catalog using default target values, transformations, translation sets, and map rules to facilitate the process. Although the majority of the data transformation setup and maintenance process is automated you may need to perform such tasks in Data Transformer before performing the tasks documented here for the Define Catalog Map component:

- Set up target field default values.
- Set up translation sets.
- Create transformations.
- Set up map rules.

Setting Up Target Field Defaults

The AutoMapper feature populates the map field details with the field value based on the target field. If Allow Map Override is not selected, you cannot override the field value at the map level. A default with no value is initialized to a blank, zero, or the appropriate PeopleSoft null value.

When setting the default values, consider the target field data type format. Character fields are used for names, codes, and letter values. Uppercase converts the field value to uppercase and signifies that no other formatting options apply to this field. Mixed case stores uppercase and lowercase characters as entered. Number fields and signed number fields are fixed in field length and allow the entry of positive numbers. Only signed numbers allow the entry of negative numbers. Date fields contain calendar dates. A date field has a field length of 10 and is maintained by the system. The default format of a date field is defined by the database and can be overridden by the browser settings.

Setting Up Translation Sets

You use translation sets to define equivalent values or a code set for data conversion, for example: EA = Each, GAL = Gallon, IN = Inch. The translation to and from values can be applied as a required rule to the map rule definition; the value is used by the AutoMapper feature based on a source input and target field in the map definition. If the value is not a required rule, you can select *Translation Set* when completing the map field details. Enter translation set values for map definition details, used as equivalent values for data transformation.

Creating Transformations

When data is copied from the source to the target, the data can be transformed using edits, lookups, or PeopleCode. Transformations allow you to change a column's value.

Note: Use the Data Transformer transformation wizard to guide you through the process of creating transformations.

Setting Up Map Rules

You can create rules to be used by the AutoMapper feature in the map field detail definition. You use rules to assign correct default values to target fields when creating maps. Using map rules, you can assign a literal default, transformation, source field, or a translation set to the target field. If the map rule is required, you cannot override the rule on the Define Catalog Map - Map Field Detail page.

Note: To access the Data Transformer Map Rules page, you need to update permissions for the delivered roles or assign additional roles.

See the product documentation for *PeopleTools: Security Administration*

Understanding Master Maps

Unlike defining map information for a single partner, defining master map information is performed at the enterprise catalog level. The pages used to enter the information are the same.

To associate the map to a master catalog source, the lookup you use to select a source data object on the Map Information page, is restricted to only source data objects created for master catalog source definitions. When the source data object is selected, the map is associated to a master catalog source as well as the partners identified to share the selected source.

Define Catalog Map - Map Information Page

Use the Define Catalog Map - Map Information page (EOEW_MAP_DFN) to enter general mapping information.

Navigation:

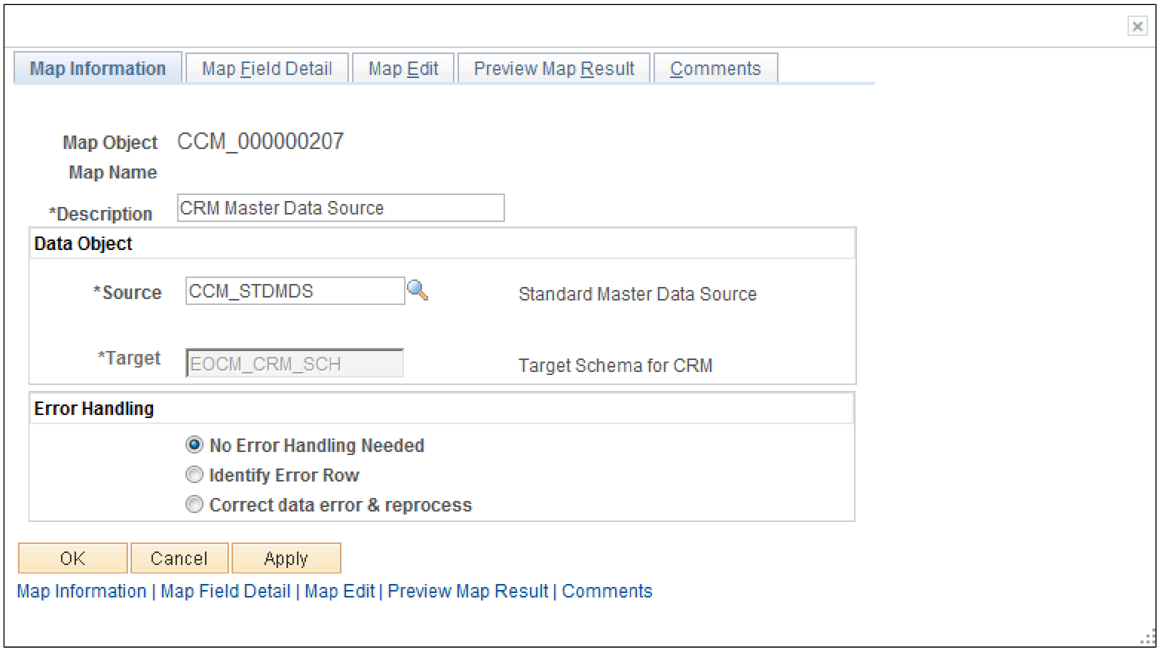
Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Select a partner catalog.

Define Catalog Map > **Map Information**

This example illustrates the fields and controls on the Define Catalog Map - Map Information page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Source	Select the source file for this map. The source selected should be the name specified as the source data object when the catalog source layout was defined.
Target	Automatically populated based on the enterprise catalog selected when navigating to this page. The value cannot be overridden. This value controls the target fields available on the Define Catalog Map - Map Field Details page.
Error Handling	Select from: *No error handling needed.* Data validation is not performed and all rows are inserted into the target table. *Identify error row:* Currently not available. *Correct data error & reprocess:* Data validation is performed. Valid rows are inserted into the target table and invalid rows are inserted into a user-defined error table. **Note:** For the Quick Item Load process, it is recommended that the Correct data error and reprocess option be selected. Error tables are created automatically if user selects the auto table creation option in the Catalog Management installation options.

Related Links

Defining Catalog Source Layouts

Define Catalog Map - Map Field Detail Page

Use the Define Catalog Map - Map Field Details page (EOEW_MAP_FLD) to enter field-level mapping definitions.

Navigation:

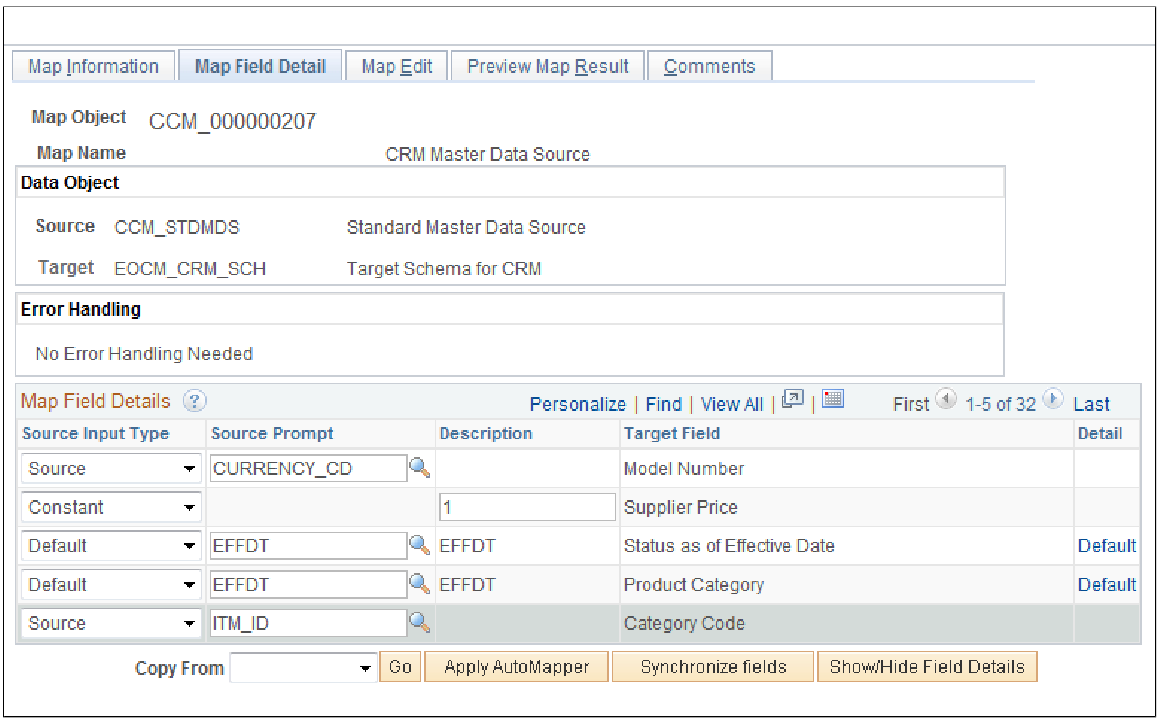
Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Select a partner catalog.

Define Catalog Map > **Map Field Detail**

This example illustrates the fields and controls on the Define Catalog Map - Map Field Detail page. You can find definitions for the fields and controls later on this page.



To define map field details, click the Apply AutoMapper button.

AutoMapper automatically attempts to match the source to target field list. It also applies any required map rules, including target field defaults, translation set values, and transformations. AutoMapper then maps remaining target fields with constant values from the PSRECFIELD.DBFIELDNAME.SQL assembler, and coordinate the transformation steps.

If modifications to the mapping defined by AutoMapper is required, make changes to these options:

Field or Control	*Description*
Source Input Type	Select from: *Source:* Select if the value is from the source file. You are prompted to select a source prompt field from the source file. *Constant:* Select if the value is a constant value, then enter that value. *Default:* Select to use a default value, then select a source prompt. Click the **Default** link to access the Set Target Field Default page. *Transformation:* Select to use a transformation, then select a source prompt. Click the Transform link to view transformation definitions, or click the Add link to add a new definition using the Transformation wizard. *Translation Set:* Select to use a translation set, then select a source prompt. Click the **Translation** link to view translation set values, or click the **Add** link to add a new set. **Important!** If you select the Source Input Type of Source, the Source Prompt lookup will include EOCM_ACCESS_ID. Do not select as mapping is performed automatically for this field.
Source Prompt	Select a source prompt based on the source input type.
Description	Enter a description if you selected *Constant* as the input type.
Target Field	Lists the name of all the fields contained in the target file.
Details	Either the **Transform, Default,** or the **Translation** link appears, based on the selected input type.
Add	The **Add** link appears if the selected input type is either *Transformation* or *Translation Set.*

Map Edit Page

Use the Define Catalog Map - Map Edit page (EOEW_MAP_EDIT) to edit map source input values used in transformation sets.

Navigation:

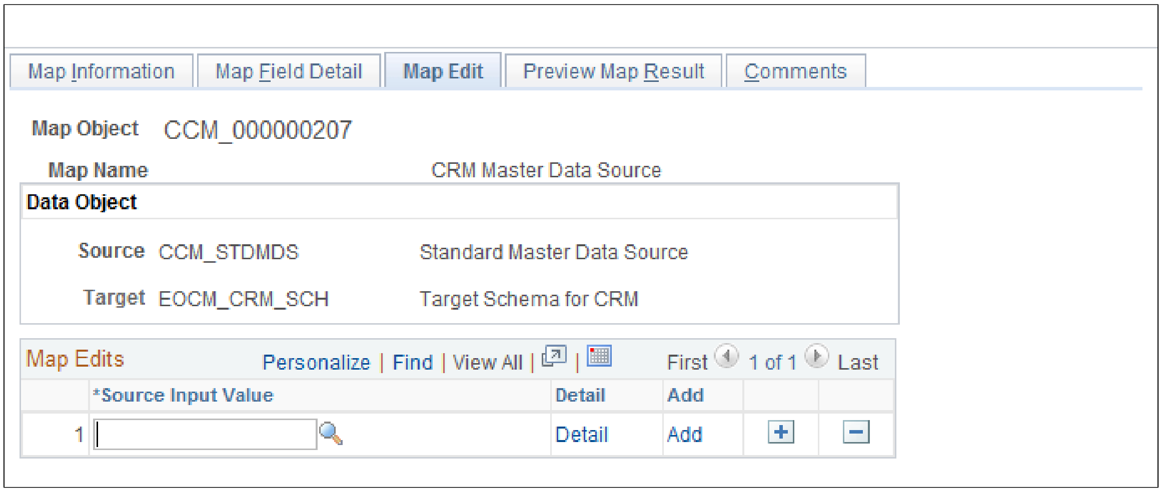
Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Select a partner catalog.

Define Catalog Map > **Map Information**

This example illustrates the fields and controls on the Map Edit page.



Select a new source input value to replace or add to the current source. Click the **Detail** link to access the Transformation Definition page and edit transformation definition information. Click the **Add** link to access the Transformation Definition page and add a new transformation.

Preview Map Results Page

Use the Define Catalog Map - Preview Map Results page (EOEW_TARPREVIEW) to view a subset of the data based on the defined map.

Navigation:

Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Select a partner catalog.

Define Catalog Map > **Preview Map Results**

Click the **Preview** button to view a subset of mapped data based on the map definitions.

Note: Map results are only available to preview after the partner source file has been imported.

Transforming and Loading Data

This topic discusses ways to transform and load offering data.

Pages Used to Transform and Load Data

Page Name	*Definition Name*	*Usage*
Load Catalog Map Page	EOCM_RUNMAP_PAGE	Choose to load either a catalog map or a master catalog map.
Load Catalog Map page	EOCM_RUN_ETL	Transform partner source data to enterprise catalog format based on the defined catalog map, and then load the newly formatted data to the enterprise catalog.Load Catalog Map Page
Load Catalog Master Map page	EOCM_RUNMST_ETL	Transfer and load data from a shared catalog source to the enterprise catalog format using a shared data map.

Understanding the Transformation and Loading Process

After a partner's offering data has been successfully imported into Catalog Management, it can be transformed into the enterprise catalog format and then loaded into the enterprise catalog.

The transformation of data is based on the catalog map that you defined for the partner's source file.

You can use three different methods to load offering data into the enterprise catalog:

- **Incremental update.**

  The system updates the most recently loaded data. Required changes are made to existing data, such as price changes, and new offering data is added.

- **Full load.**

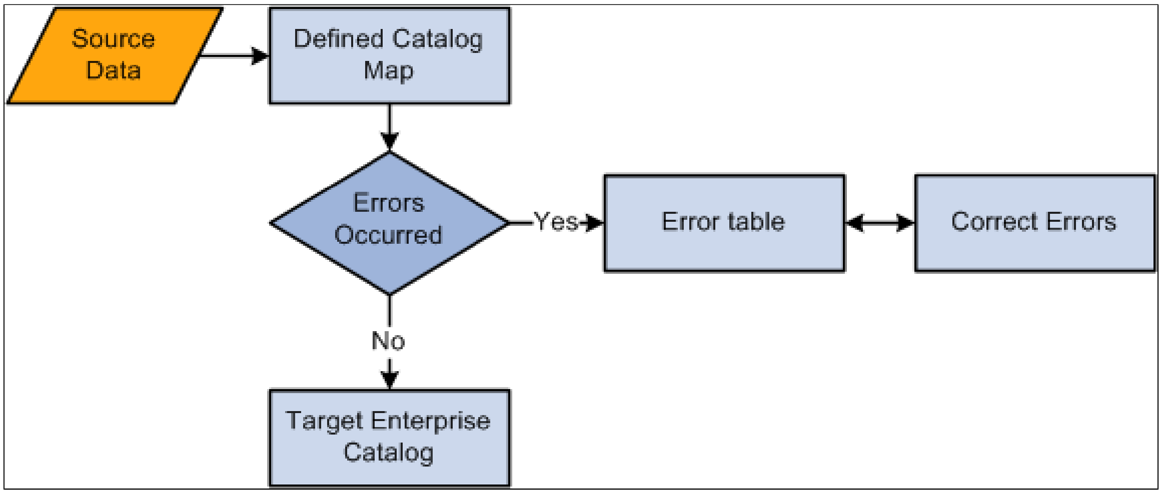
  The system replaces the current data with the new data.

- **Error recycle only.**

  If errors occurred during a previous attempt, this is the only option available. The system uses the data in the corrected error table as the source data.

The following diagram illustrates the transformation and loading process of source data to the target enterprise catalog.

The transformation and loading process of source data to the target enterprise catalog



Note: The process of transferring and loading data from a shared catalog source to the enterprise catalog format, using a master data map is similar to transferring and loading data for a single partner. The only difference is when you select the catalog map object. The selection is restricted to master catalog maps associated to the selected partner.

Related Links

Defining Catalog Maps

Load Catalog Map Page

Use the Load Catalog Map page (EOCM_RUNMAP_PAGE) to choose to load either a catalog map or a master catalog map.

Navigation:

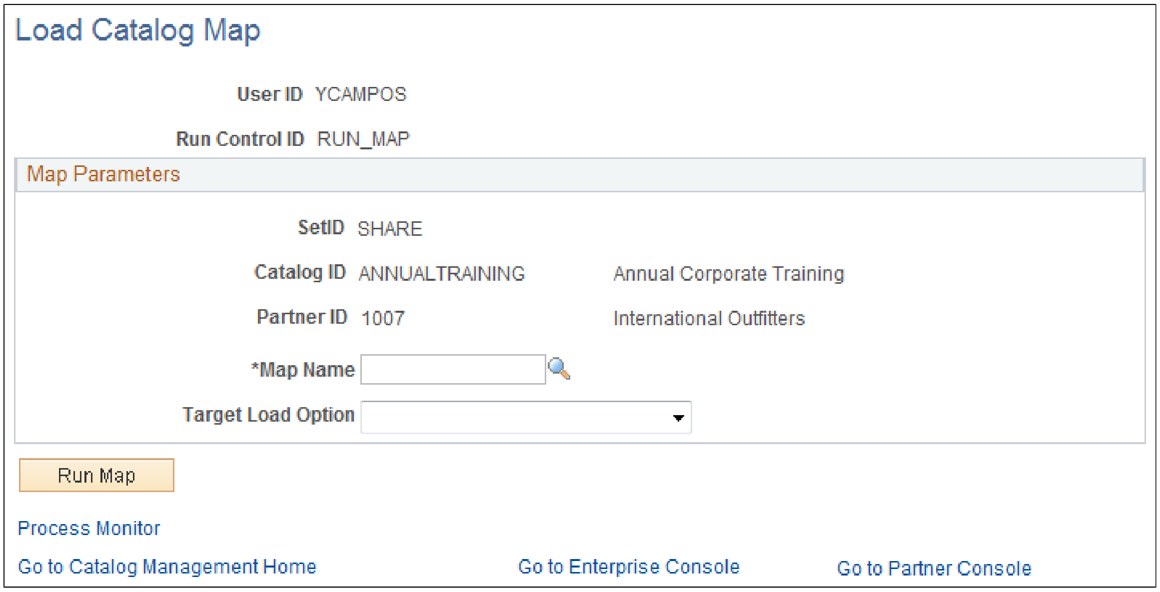
Catalog Management > **Catalog Management Home.**

Select an enterprise catalog.

Select a partner catalog.

Load Catalog Map

This example illustrates the fields and controls on the Load Catalog Map page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Set ID and **Catalog ID**	Values are based on the enterprise catalog selected on the Catalog Management Home page. The name of the enterprise catalog is displayed to the right of the catalog ID.
Partner ID	The value is based on the partner catalog selected on the Enterprise Catalog Console page. The name of the partner source is displayed to the right of the partner ID.
Map Name	Select the catalog map defined for this partner source file.
Target Load Option	Select from: • *Attachment Only.* • *Error Recycle Only.* • *Full Load.* • *Incremental Update.* • *Price Only* **Note:** The *Error Recycle Only* option is available only if errors exist.
Run Map	Click to transform and load the offering data.

Note: A new version of the partner offering data is created once the transformation and load process has completed.

Using Attachment Only Target Load Option

An *Attachments Only* load give users the opportunity to add attachments to offerings that already exist in a staged or production version of the catalog without having to import, load, and categorize the offerings again. Attachments can also be associated to offerings using Maintain Partner Offerings.

If you have a different file format for updating attachments, you will need to create a new source definition and define a second catalog map to use when performing an *Attachments Only* load. At a minimum, this map definition must contain mapping information for the attachment and key fields. For example:

- Supplier Item ID.
- File Name.
- File Extension.
- File Path.

Note: An *Attachments Only* load can be performed only when the most recent version has a status of Staged or Production.

If you performed an *Attachments Only* load, the system will make a copy of the most recent partner version and increment the version by 1. For example, if the most recent version is version 5, the system copies that version to version 6. The system will then update offerings with the new attachments using the key fields to match offerings. The system will ignore offerings that have no match. The new version is automatically staged.

Using Price Only Target Load Option

A *Price Only* source data load give users the opportunity to update price fields for offerings that already exist in a staged or production version of the catalog without having to import, load, and categorize the offerings again.

If you have a different file format for updating prices, you must create a new source definition and define a second catalog map to use when performing a *Price Only* load. At a minimum, this map definition must contain mapping information for the prices and the key fields. For example:

- Supplier Item ID.
- Unit of Measure.
- Supplier Price.

Note: A *Price Only* load can be performed only when the most recent version has a status of staged or production. If the most recent version does not have a status of staged or production, the only available target load options will be *Full Load* or *Incremental Update.*

When you perform a *Price Only* load, the system will make a copy of the most recent partner version and increment the version by 1. For example, if the most recent version is version 5, the system copies that version to version 6. The system will then update offerings with the new prices using the key fields to match offerings. The system will ignore offerings that have no match. The new version is automatically staged.

Related Links

Creating Versioning

Removing Partner Versions

This topic discusses the way to remove unused partner versions.

Page Used to Remove Unused Partner Versions

Page Name	***Definition Name***	***Usage***
Remove Versions Page	EOCM_VER_REM	Delete all the data for the selected partner version and clean up all the records that point to that partner version.

Understanding the Removal Process

Catalog Management allows catalog managers and partners to load and maintain several different versions of a partner's data. Once a version is selected for production, all other versions are stored but not used again. The remove Unused Versions feature provides a way for the catalog manager to remove these unused partner versions.

Important! Remove means deleting all the partner data. Once removed, the partner version cannot be retrieved.

Remove Versions Page

Use the Remove Versions page (EOCM_VER_REM) to delete all the data for the selected partner version and clean up all the records that point to that partner version.

Navigation:

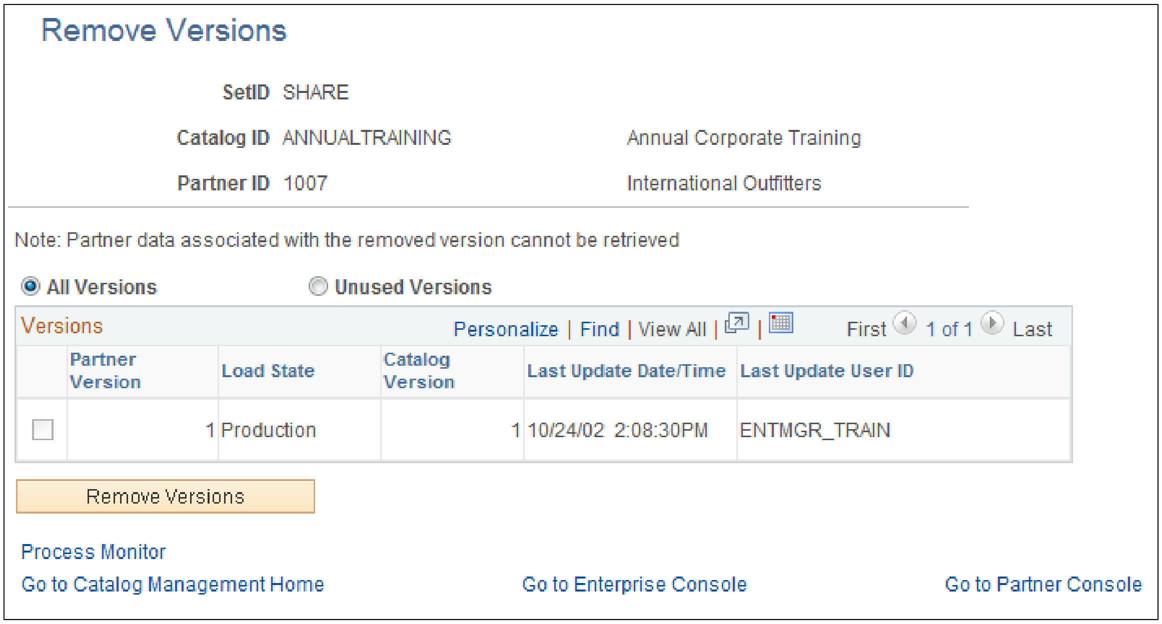
Catalog Management > **Catalog Management Home.**

Select an enterprise catalog.

Select a partner catalog.

Remove Unused Versions.

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



Field or Control	***Description***
SetID and **Catalog ID**	Values are based on the enterprise catalog selected on the Catalog Management Home page
Partner ID	Value is based on the partner catalog selected on the Enterprise Console.
All Versions or **Unused Versions**	Select *All Versions* to list all versions of partner data for this partner. Select *Unused Versions* to list only those versions that are no longer used (Default).
Versions	Displays a list of partner versions based on the previous selection, including these options: • Partner Version. • Load State. For example, *Loaded, Categorized, Staged, Production.* • Catalog Version. • Last Update Date/Time. • Last Update User ID.

Field or Control	Description
Select	Select the associated check boxes to select the partner versions you want to remove. The check box will be disabled for: • Version that has been moved to production. • Currently staged version. • Latest version.
Remove Versions	Click to run the application engine EOCM_REM_VER process. The process is submitted. Click the **Process Monitor** link to monitor the status of the request. **Note:** Once removed, the partner version cannot be retrieved.

Chapter 8

Categorizing Offering Data

Understanding Configurable Categorization and the Categorization Process

With categorization, you associate partner offerings to catalog offerings, and group them into enterprise catalog categories. Configurable categorization improves the probability of automatically matching a partner's offering to an enterprise offering, and also the probability of automatically matching a partner's category to an enterprise category.

With configurable categorization, you can choose the fields used for matching partner offerings to catalog offerings, and also create rules based on those fields. Each rule can contain multiple conditions and can be applied to several partner catalogs across the same catalog type. It can also be specific to one partner catalog.

Category substitutions automatically match partner categories with enterprise categories, based on user-defined substitute categories. For example, the enterprise category Notebook Computers always matches the partner category Laptops. This feature can be used when you know that partners suggest certain categories and you want them matched with specific enterprise categories.

When reviewing categorization results, you can:

- Manually associate partner offerings to catalog offerings.
- Propose new catalog offerings when no association exists.
- Update partner offering information.
- Manually associate proposed new catalog offerings to catalog categories.
- Propose new categories when there is no match with existing catalog categories.

Note: The above activities, with the exception of creating rules and defining substitutions, can be performed by partners if they have been granted privileges.

After the categorization review process is complete, the offering assignments are ready to be approved by the enterprise catalog manager, and the partner catalog can be staged for inclusion in the next production version of the enterprise catalog.

Creating Categorization Rules

To create categorization rules, use the Maintain Categorization Rules (EOCM_CAT_RULE) component.

You use categorization rules to map between partner offerings and the business categories.

Pages Used to Create Categorization Rules

Page Name	***Definition Name***	***Usage***
Maintain Categorization Rules Page	EOCM_CAT_RULE	Create and maintain rules, made up of conditions in priority order, for the categorization process.

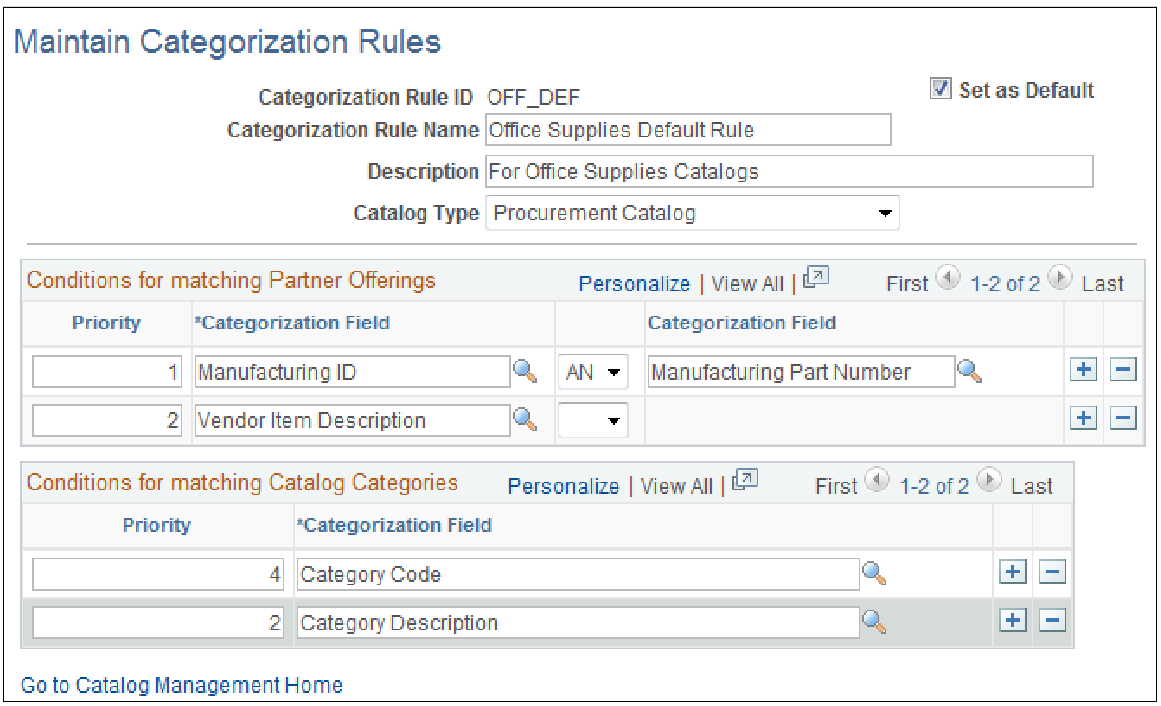
Maintain Categorization Rules Page

Use the Maintain Categorization Rules page (EOCM_CAT_RULE) to create and maintain rules, made up of conditions in priority order, for the categorization process.

Navigation:

Catalog Management > **Catalog Management Home** > **Maintain Categorization Rules**

This example illustrates the fields and controls on the Maintain Categorization Rules page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Catalog Type	Select the catalog type for this rule. **Note:** The categorization fields available to create rule conditions are based on the catalog type and the fields selected on the Installation Options - Categorization page.

Field or Control	***Description***
Set as Default	Select to use the rule as the default for the categorization process. This selection overrides any previous selection. Only one default per catalog type is allowed.
Priority	Define the priority order. The system automatically prioritizes the conditions by the order entered. You can reorder the conditions. The system reads the priority order from low to high. Gaps in the numbering sequence are acceptable.
Categorization Field	Select a field for the condition.
Operator	(Optional) Select a logical operator. Required to add an additional field to the condition. **Note:** Currently, *And* is the only option available. When you link two fields with *And,* an offering is considered a match only if both the first and second field match. Only one categorization field is permitted for catalog category conditions.
Categorization Field	(Optional) Select a second field for the condition.

Relating Multiple Conditions

When a rule includes multiple conditions, PeopleSoft automatically links them using the OR operator. When two conditions are linked with OR, an offering is considered a match if the first or the second condition matches, not necessarily both. The conditions are evaluated in priority order, and as soon as one condition is satisfied, processing is complete for that offering.

Related Links

Procurement Categorization, Customer Categorization or Training Categorization Page

Defining Category Substitutions

To define category substitutions, use the Translate (EOCM_TRANSLATE) component.

You use category substitutions when you know partners suggest certain categories and you want those categories replaced with internal categories.

Pages Used to Define Category Substitutions

Page Name	***Definition Name***	***Usage***
Maintain Categorization Substitutions Page	EOCM_TRANSLATE	Create and maintain substitutions for the categorization process.

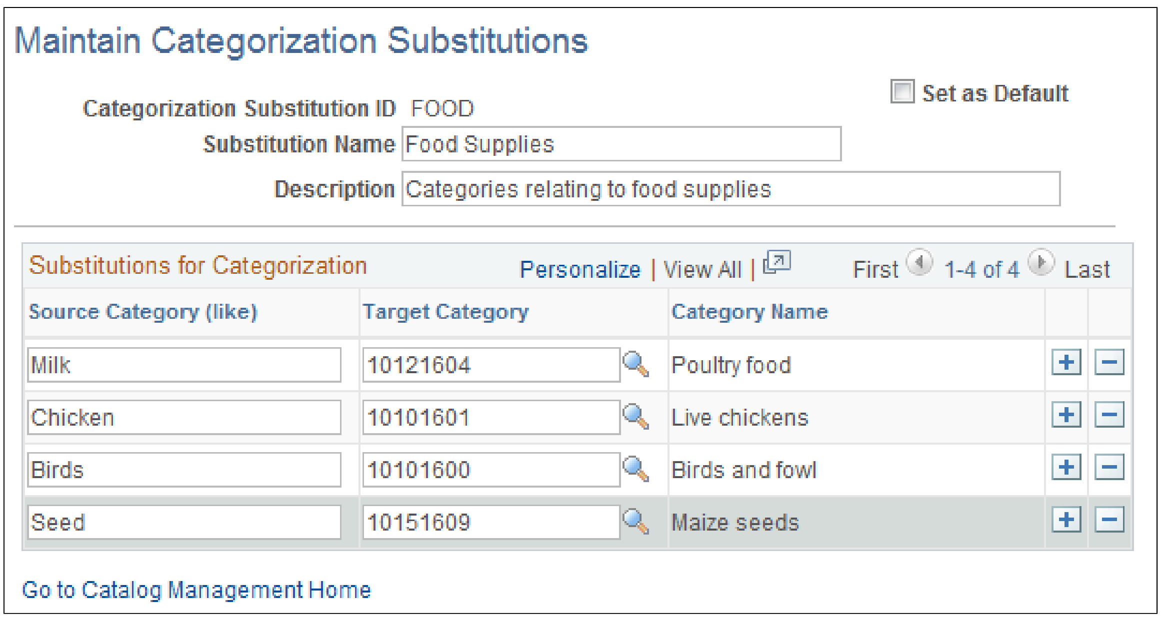
Maintain Categorization Substitutions Page

Use the Maintain Categorization Substitutions page (EOCM_TRANSLATE) to create and maintain substitutions for the categorization process.

Navigation:

Catalog Management > **Catalog Management Home** > **Maintain Categorization Substitutions**

This example illustrates the fields and controls on the Maintain Categorization Substitutions page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Substitution Name	Enter a name for this substitution set. **Note: Categorization Substitution ID** and **Substitute Name** are the only fields available on the Search page.
Set as Default	Select to use the substitution set as the default for the categorization process. This selection overrides any previous selection. Only one default per catalog type is allowed.

Field or Control	***Description***
Source Category	Enter the partner category name. This is a free text field with no validation. The system finds categories that are very similar to the value entered. For example, if you enter *color pencils,* the system also finds *colored pencils* and *coloring pencils.*
Target Category	Select a category from the enterprise catalog. All partner offerings within the source category are grouped under the target category.

Categorizing Partner Offering Data

You use the Categorize Offerings page to review data and run the categorization process.

Note: At this stage of the process, you can only see offering data belonging to the selected partner. Categorization is the last step in preparing the data for consolidating with offerings from other partners.

Pages Used to Categorize Partner Offering Data

Page Name	***Definition Name***	***Usage***
Categorize Offerings Page	EOCM_CATEGORIZE	Review Run Catalog Map process (EOCM_RUN_MAP) results and launch the categorization process.

Categorize Offerings Page

Use the Categorize Offerings page (EOCM_CATEGORIZE) to review Run Catalog Map process (EOCM_RUN_MAP) results and launch the categorization process.

Navigation:

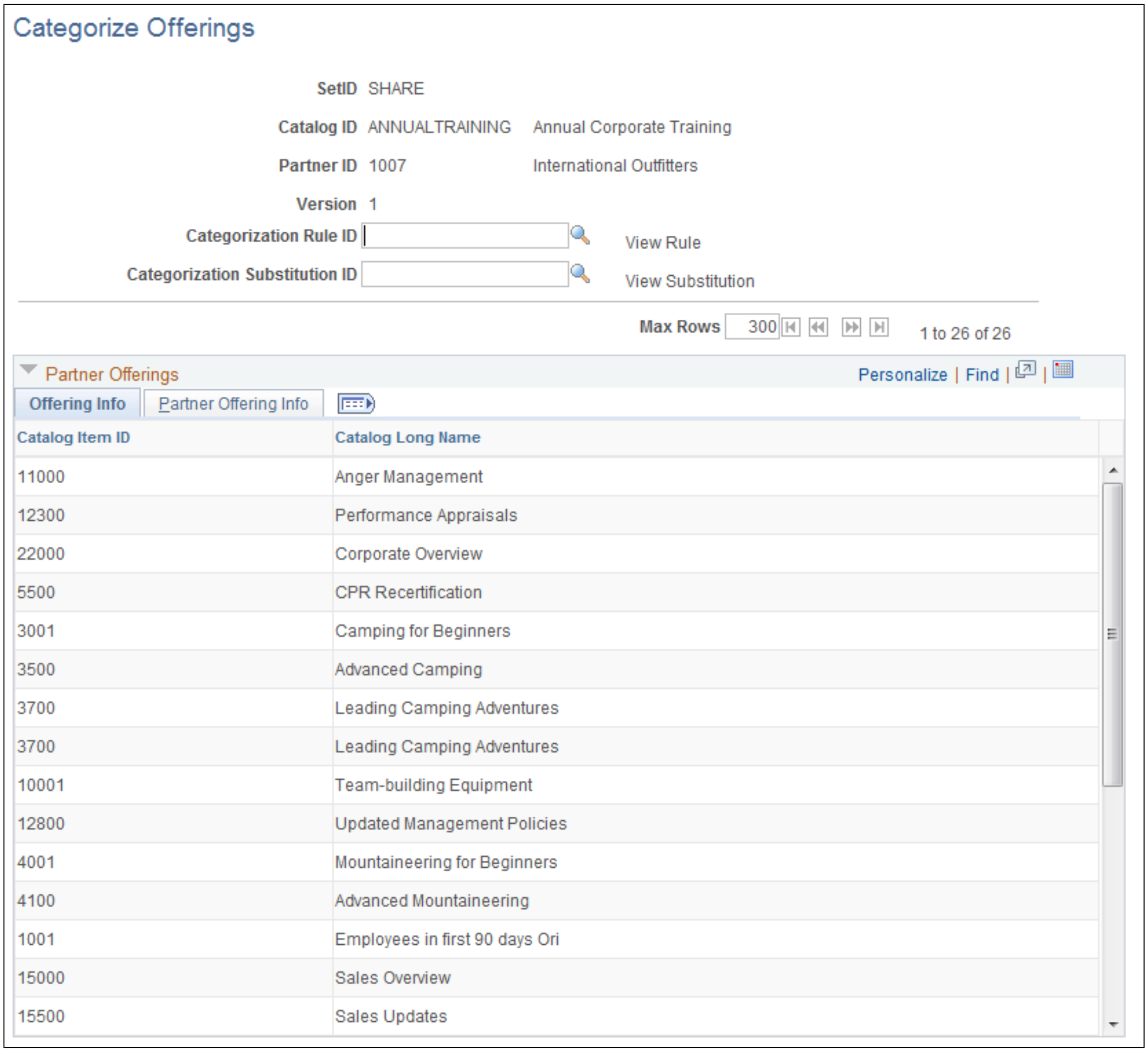
Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Select a partner catalog.

Categorize Offerings

This example illustrates the fields and controls on the Categorize Offerings page: Offering Info tab. You can find definitions for the fields and controls later on this page.



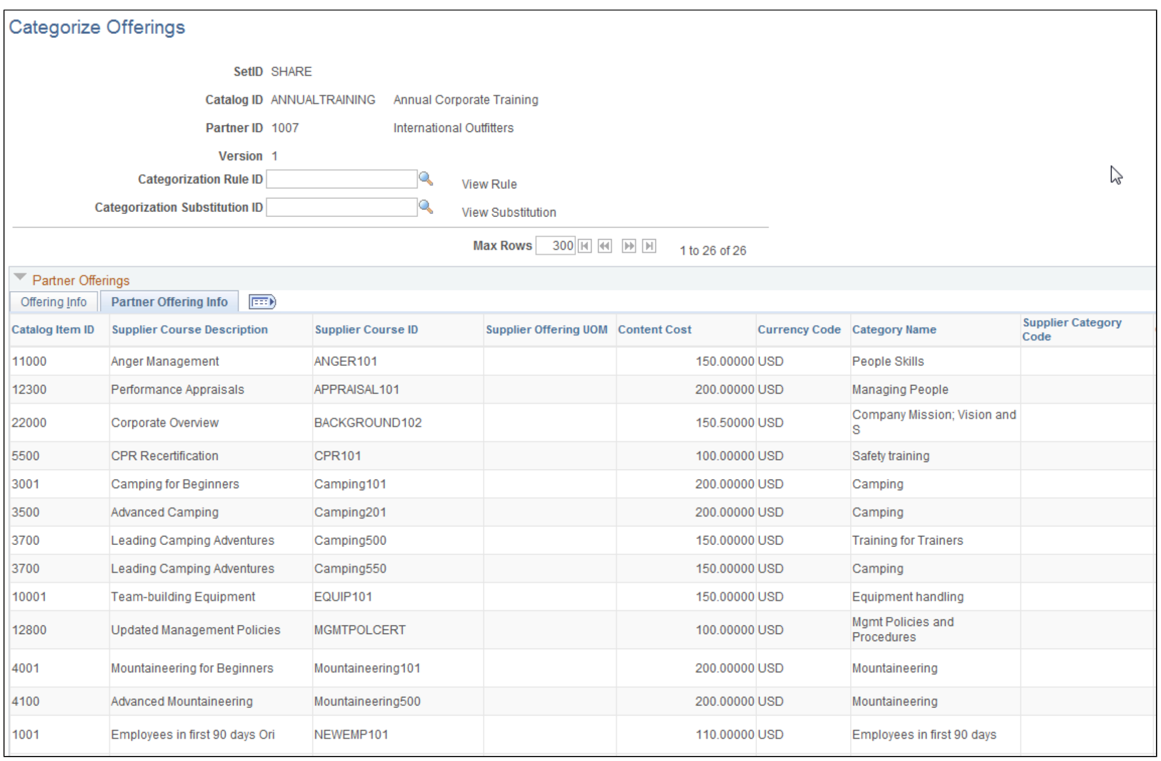
Field or Control	***Description***
Categorization Rule ID	Select a rule. If a rule has been set as the default, it is already selected.
View Rule	Click to view the details of the selected rule in a new browser window.
Categorization Substitution ID	Select a substitution set. If a substitution set has been set as a default, it is already selected.
View Substitution	Click to view the details of the selected substitution set in a new browser window.

Field or Control	***Description***
Max Rows (maximum rows)	Enter the maximum number of rows, no greater than 300, to display in the grid. Use the arrows to page up, page down, go to end, or go to beginning. The rows currently in the grid and the total number of rows are also displayed.
Offering ID and **Offering Description**	Displays the offering description and ID. If a partner offering is not mapped to a catalog offering ID, the offering ID and offering description fields are blank, and values are assigned during categorization. If they are mapped, then new catalog offerings are created with the mapped offering ID and description, providing no association is found between the partner offering and catalog offerings.

Partner Offering Info Tab

Select the Partner Offering Info tab (select the **Partner Offering Info** tab on the Categorize Offerings page).

This example illustrates the fields and controls on the Categorize Offerings page: Partner Offering Info tab. You can find definitions for the fields and controls later on this page.



Catalog Item ID	Supplier Course Description	Supplier Course ID	Supplier Offering UOM	Content Cost	Currency Code	Category Name	Supplier Category Code
11000	Anger Management	ANGER101		150.00000	USD	People Skills	
12300	Performance Appraisals	APPRAISAL101		200.00000	USD	Managing People	
22000	Corporate Overview	BACKGROUND102		150.50000	USD	Company Mission; Vision and S	
5500	CPR Recertification	CPR101		100.00000	USD	Safety training	
3001	Camping for Beginners	Camping101		200.00000	USD	Camping	
3500	Advanced Camping	Camping201		200.00000	USD	Camping	
3700	Leading Camping Adventures	Camping500		150.00000	USD	Training for Trainers	
3700	Leading Camping Adventures	Camping550		150.00000	USD	Camping	
10001	Team-building Equipment	EQUIP101		150.00000	USD	Equipment handling	
12800	Updated Management Policies	MGMTPOLCERT		100.00000	USD	Mgmt Policies and Procedures	
4001	Mountaineering for Beginners	Mountaineering101		200.00000	USD	Mountaineering	
4100	Advanced Mountaineering	Mountaineering500		200.00000	USD	Mountaineering	
1001	Employees in first 90 days Ori	NEWEMP101		110.00000	USD	Employees in first 90 days	

Partner offerings are listed using the field names based on the catalog type. Additional fields reflecting the status of the offerings are described below.

Verify that all offerings listed in the source file are listed here, and that the mapping of the original data is correct.

Note: The total number of offerings is displayed above the grid. For example, 1 to 300 of 3000.

Field or Control	***Description***
Offering Status	Offering status can be one of these options: • *Loaded:* Run Catalog Map process (EOCM_RUN_ MAP) has been performed, and offerings are ready to be categorized. • *Categorized:* The categorization process has been run. • *Staged:* The selected partner's offerings have been consolidated with the offerings from the enterprise's other partners.
Offering State	*New:* This offering has never been offered by this partner. *Updated:* This offering already exists for this partner, but the data has changed. *Unchanged:* There is no change to this offering compared to when it was loaded in a prior version. *Deleted:* This offering was included in a prior load, but is marked as *Inactive* in the current load.
Message Text	Blank until categorization is run.
Run Categorization	Click to run the categorization. A process request is submitted. Click the **Process Monitor** link to monitor the status of the request. **Note:** If the offering status of the selected partner's offerings version is either *Staged* or *Production* the **Run Categorization** button is not displayed.

See the product documentation for *PeopleTools: Process Scheduler*

Reviewing Categorization Results

This topic discusses how to review categorization results, update partner offering details, update proposed offering categories, update catalog offering categories, and revalidate partner offerings.

Important! Changes made to partner offerings should also be made in the partner's catalog source file. This prevents the same errors, rejections, and so forth from occurring again.

Pages Used to Review Categorization Results

Page Name	*Definition Name*	*Usage*
Review Categorization Results Page	EOCM_REPAIR2	Review and update offerings and their associated categories.
Partner Offering Details Page	EOM_GENDTL_SEC	Manually update the partner offering detail record.
Proposed Offering Details Page	EOCM_NEWOFF_DTLS	Assign proposed new offerings to categories.
Catalog Offering Details Page	EOCM_OFFER_DTLS	Assign catalog offerings to categories.
Choose Category Page	EOCM_CHOOSECAT	Assign proposed new catalog offerings to categories using the category hierarchy tree.

Common Elements Used in This Section

Field or Control	*Description*
Offering ID	The enterprise catalog's offering ID for the selected offering. The offering description is displayed to the right.
Primary Category	Select the check box associated with the category that you want as the primary category. If only one category exists, the check box is automatically selected. **Note:** For procurement catalogs, the primary category is the category used with Supply Chain Management.

Review Categorization Results Page

Use the Review Categorization Results page (EOCM_REPAIR2) to review and update offerings and their associated categories.

Navigation:

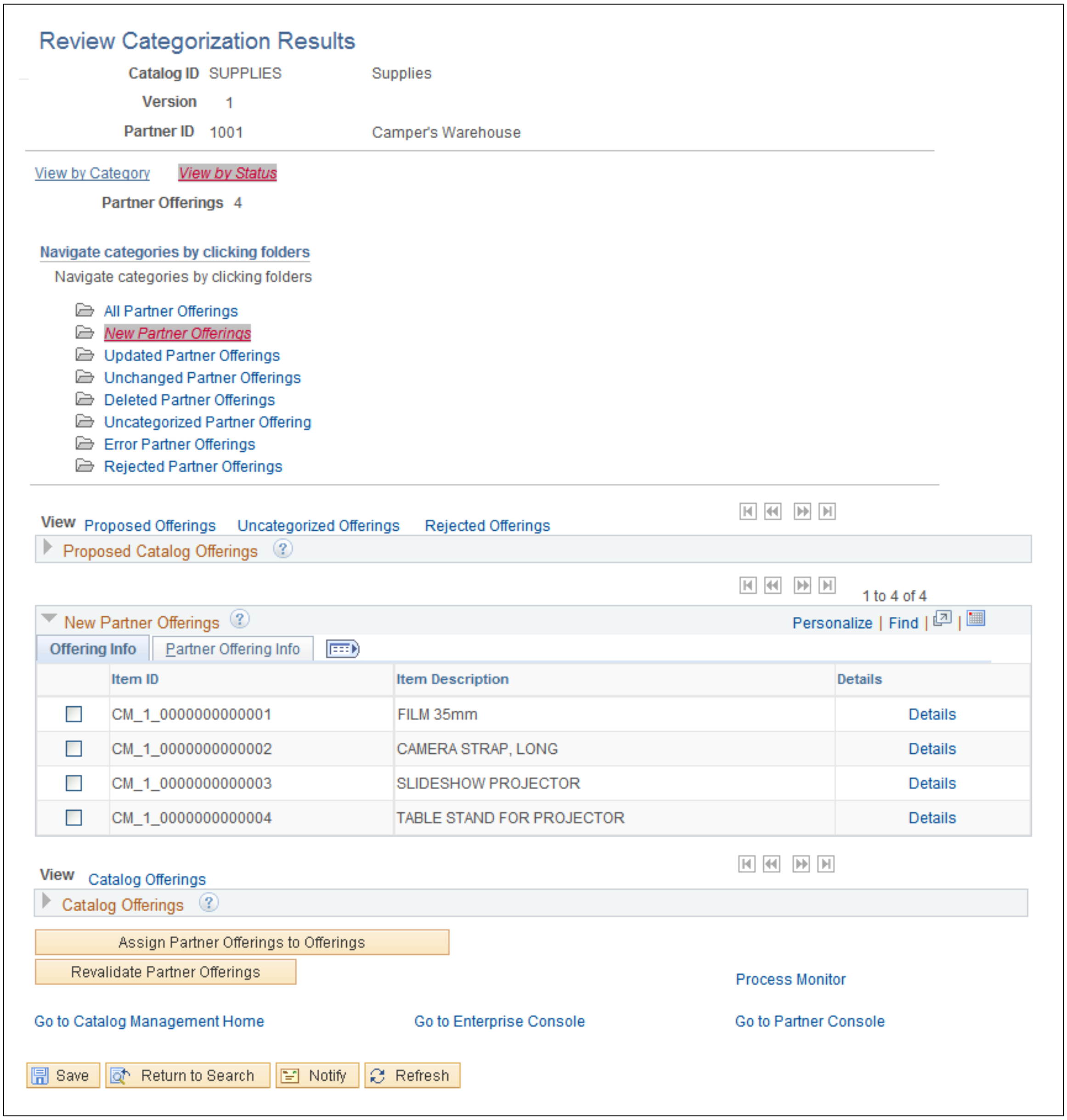
Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Select a partner catalog.

Review Categorization Results

This example illustrates the fields and controls on the Review Categorization Results: View by Status page.



View By Status

Click **View by Status** link to display status types as links. When you select a status, the number of partner offerings associated with that status appears to the right of the **View by Status** link.

The following table lists the different status types and the action that can be taken:

Status	***Description***	***Action***
All	Shows all partner offerings.	Review categorization summary results.

Status	**Description**	**Action**
New	*Incremental Load:* Offerings that are new for this partner. *Full Load:* Previous load version is overwritten so all offerings will be considered new.	Review the category and catalog offering association. Associate partner offerings to existing catalog offerings as necessary.
Updated	Offerings that have been changed since the previous load version.	Review partner offering updates and associations.
Unchanged	Offerings that have no changes between this load and the previous load version.	Review partner offerings associations.
Deleted	Offerings that are marked *Inactive* in the current load, but existed in a previous load version.	Verify that these partner offerings are no longer offered.
Uncategorized	Offerings with no category assigned.	Assign partner offerings to existing catalog categories.
Error	Offerings that contain errors.	Determine and correct errors.
Rejected	Proposed catalog offerings that were rejected during the approval process.	Reassign partner offerings to existing catalog offerings.

The following three grids are displayed in a collapsed state below the status links. Only the partner offerings associated with the selected status appear in the grids:

- Partner Offerings.
- Proposed Offerings.
- Catalog Offerings.

View By Status: Partner Offerings Grid

The Partner Offerings grid contains information about the partner offerings after categorization. The Offering Info section includes a **Detail** link for each partner offering listed. This link is used to update offering information.

To assign one or more partner offerings to a proposed or enterprise catalog offering:

1. Select the check box for each partner offering to assign.
2. Go to either the Catalog Offerings grid or the Proposed Offerings grid and select the check box associated with the catalog offering to associate to the selected partner offerings.

Note: To prevent the selection of more than one catalog offering, the check boxes associated with the remaining catalog offerings are inactive.

3. Click the **Assign Partner Offerings to Offerings** button.

Note: Refresh the page to view assignments.

You can also review the message text generated by the categorization process for all partner offerings. The following table lists the messages that can be generated:

Message Text	***Description***
Partner Offering Found.	Matches the existing partner offering.
Catalog Offering Found.	Matches the catalog offering.
Catalog Offering Name/Partner Offering Name Missing.	Error: Catalog and partner offering names are required.
Category Found	Partner offering category matches the catalog category.
New Offering/Category	Either the partner offering, the category it is assigned to, or both, do not exist in the enterprise catalog. **Note:** Although an offering may be new for this partner, it still exists in the enterprise catalog if it is offered by another partner.
Duplicate Offering ID/Unit of Measure/EFFDT	Error: Duplicate partner offerings in this load.
No Offering ID	Error: Catalog offering ID is missing.
Duplicate Offering ID	Error: Duplicate Catalog offering ID.

View By Status: Proposed Catalog Offerings Grid

The Proposed Catalog Offerings grid is not populated until a status is selected and one of these links, located above the title bar, is selected:

- Proposed Offerings.

  The grid is populated with proposed catalog offerings that currently do not exist in the catalog for the selected status. For example, no other partner offers this offering.

  For each offering listed, the system automatically generates an offering ID and copies the supplier description to the offering description.

- Uncategorized Offerings.

  The grid is populated with proposed catalog offerings that have no category provided.

  Click the Detail link associated with each proposed catalog offering to access the Proposed Offering Details page and assign a category.

- Rejected Offerings.

  The grid is populated with proposed new catalog offerings that were rejected during the approval process.

  Move the associated partner offerings to catalog offerings.

  Note: When the Stage Partner Offerings (EOCM_STAGE) process is run, only approved partner offerings are staged.

View By Status: Catalog Offerings Grid

The Catalog Offerings grid is not populated until a status is selected and the Catalog Offerings link, located above the title bar, is selected. The grid is populated with all catalog offerings currently in the catalog.

Click the **Detail** link associated with each catalog offering to access the Catalog Offering Details page and review or remove assigned categories, and assign additional categories.

Results By Category

Navigation:

Click the **View by Category** link.

View categorization results by category to verify if partner offerings have been assigned to the correct categories. As each category within a group is highlighted, the number of partner offerings, catalog offerings, and proposed catalog offerings contained in that category are displayed to the right. You can use the Find Category feature to search for a specific category within the hierarchy.

See Maintain Category Hierarchies Page.

You can review offerings by these groups:

- Catalog categories.

  Use the folder icons to navigate through the enterprise catalog's category hierarchy. The number of offerings contained in each category appears as the category is selected.

  Note: Only the number of offerings contained in the highlighted category are counted. For instance, the number of offerings displayed for a parent category does not include the number contained in its child categories.

- Proposed categories.

  Review offerings that are assigned categories that do not exist in the enterprise catalog and are proposed to be included.

- Unknown category.

  Review all offerings that have no category assigned.

- Rejected categories.

  Review offerings that are assigned to categories that were rejected during the approval process.

Related Links

Categorizing Partner Offering Data

Partner Offering Details Page

Use the Partner Offering Detail page (EOM_GENDTL_SEC) to manually update the partner offering detail record.

Navigation:

Catalog Management > **Catalog Management Home**

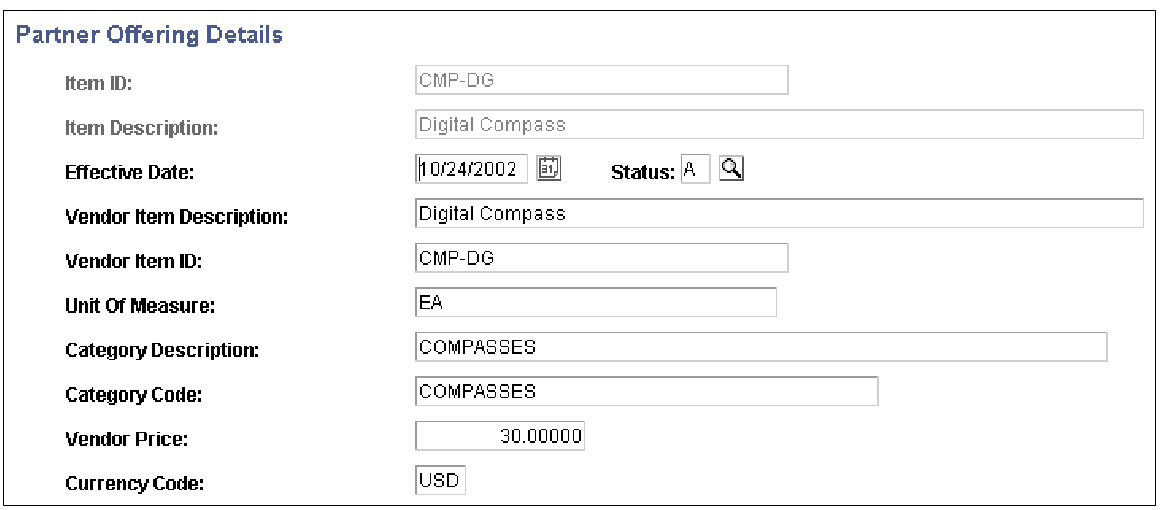
Select an enterprise catalog.

Select a partner catalog.

Review Categorization Results

Select Partner Offerings.

This example illustrates the fields and controls on the Partner Offering Details page.



Update detail information for the selected partner offering. All field values, except the offering ID and description, can be updated.

The fields that appear are based on the enterprise catalog type.

Click **OK** to save changes and return to the Review Categorization Results page.

Note: Remember to update the partner source file with any changes made to offering detail information.

Proposed Offering Details Page

Use the Proposed Offering Details page (EOCM_NEWOFF_DTLS) to assign proposed new offerings to categories.

Navigation:

Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Select a partner catalog.

Review Categorization Results

Select Proposed Offerings

This page is used to:

- Propose a new category.
- Remove a proposed new category and assign an existing category.
- Add additional categories.
- Change the primary category.

Field or Control	*Description*
Category ID, Category Name and **Category Code**	Displays one or more of these options: • Category information of a proposed new category. • Category information of a matched enterprise catalog category. • No information.

Catalog Offering Details Page

Use the Catalog Offering Details page (EOCM_OFFER_DTLS) to assign catalog offerings to categories.

Navigation:

Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Select a partner catalog.

Review Categorization Results

Select Catalog Offerings.

This example illustrates the fields and controls on the Catalog Offering Details page.

Associate an existing catalog category with the selected catalog offering.

Choose Category Page

Use the Choose Category page (EOCM_CHOOSECAT) to assign proposed new catalog offerings to categories using the category hierarchy tree.

Navigation:

Catalog Management > **Catalog Management Home**

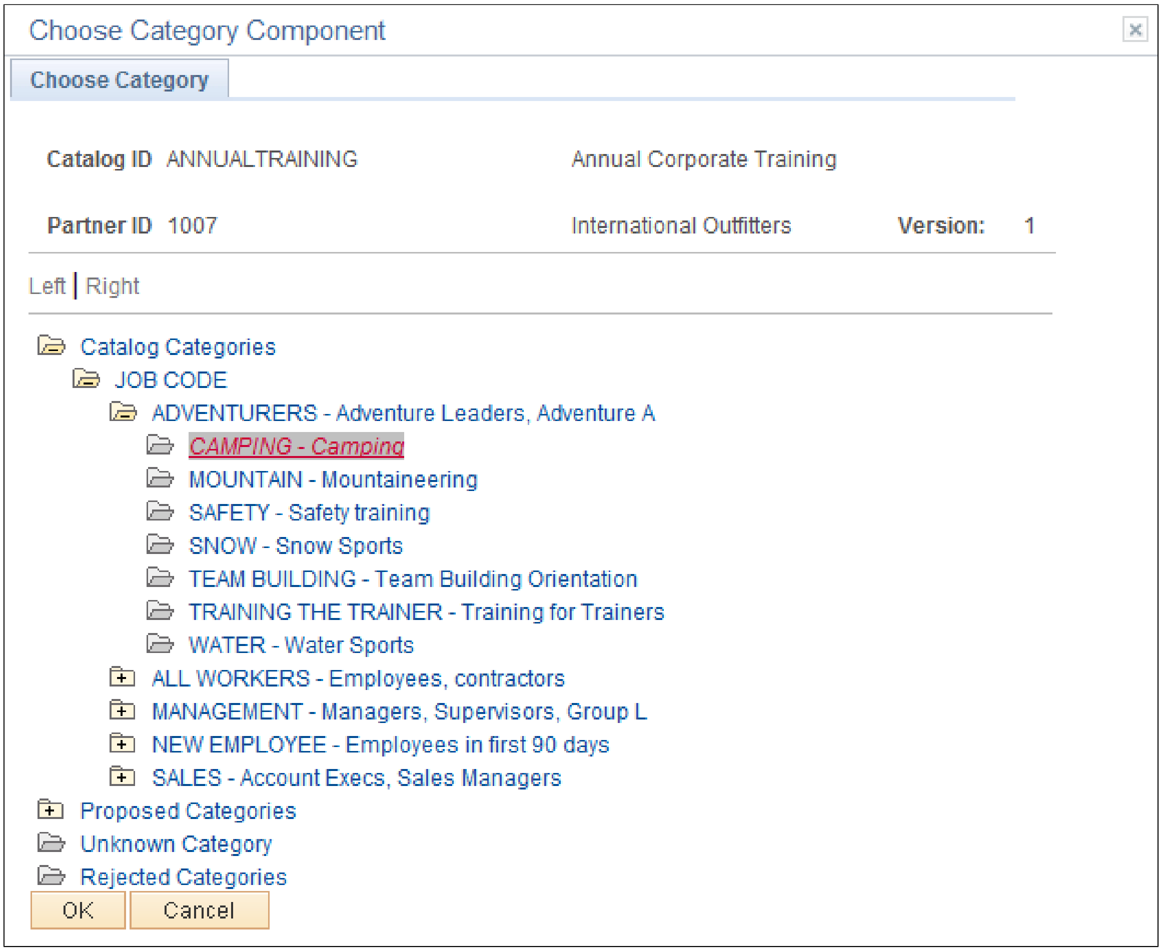
Select an enterprise catalog.

Select a partner catalog.

Review Categorization Results

Click Assign Offerings to Category.

This example illustrates the fields and controls on the Choose Category page.



Select the appropriate category group and navigate to the category you want to assign to the selected offering. Click OK.

Revalidating Partner Offerings

When you revalidate partner offerings, you run the validation (EOCM_REVALID) process to detect any errors that may have resulted from updating partner data. Review the initial categorization results completely before revalidating.

Once you have completed the review and all the required adjustments are made, click **Revalidate Partner Offerings.** A process request is submitted. Click the **Process Monitor** link to monitor the status of the request. When it has the process has completed successfully, return to the Review Categorization Results page to once again review results. When you are satisfied, the partner offerings are ready for approval.

See the product documentation for *PeopleTools: Process Scheduler*

Approving Categorization Results

The enterprise catalog manager is responsible for approving, or rejecting proposed categories and proposed catalog offerings based on categorization results.

Pages Used to Approve Categorization Results

Page Name	***Definition Name***	***Usage***
Approve Proposed Categories and Catalog Offerings Page	EOCM_APPROVE	Approve (or reject) proposed categories and catalog offerings.

Approve Proposed Categories and Catalog Offerings Page

Use the Approve Proposed Categories and Catalog Offerings page (EOCM_APPROVE) to approve (or reject) proposed categories and catalog offerings.

Navigation:

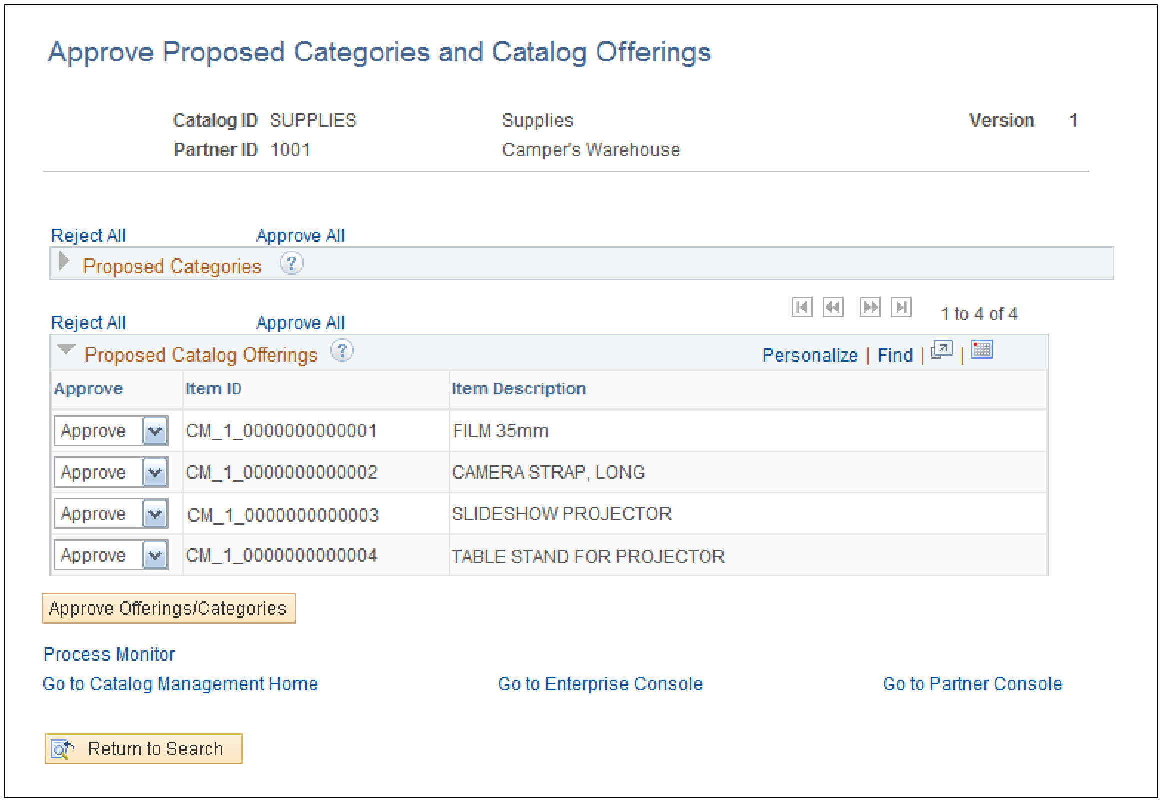
Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Select a partner catalog.

Approve Proposed Categories and Catalog Offerings

This example illustrates the fields and controls on the Approve Proposed Categories and Catalog Offerings page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Approve Offerings/Categories	Click to approve all new categories and catalog offerings that are not marked for rejection. A process request is submitted. Click the Process Monitor link to monitor its status. Once it has completed successfully, you can return to the Approval page. Only the categories and catalog offerings that were initially rejected are listed.

Proposed Categories

Field or Control	***Description***
Category Hierarchy	Select a hierarchy. The category is added to the root level of the category hierarchy. **Note:** If no hierarchy is selected, the category will be approved, but will not appear on any hierarchy.

Field or Control	*Description*
Reject	Select to reject a category. Rejected categories do not become part of the enterprise category hierarchy. You cannot browse associated partner offerings by this category.

Proposed Catalog Offerings

Lists all the proposed new catalog offerings.

Select the Reject check box located to the left of each catalog offering to reject. Rejected catalog offerings and associated partner offerings are not in the current enterprise catalog. To include partner offerings, they need to be assigned to existing enterprise catalog offerings.

Chapter 9

Staging and Browsing Partner Offerings

Staging Partner Offerings

The staging process indicates that a partner's offerings and associated categories have been approved by the enterprise catalog manager and are ready to be included in the current version of the enterprise catalog. The staging process consolidates selected partner offerings with the offerings from the enterprise's other partners.

Page Used to Stage Partner Offerings

Page Name	***Definition Name***	***Usage***
Stage Partner Offerings Page	EOCM_LOAD_NEW	Consolidate partner offerings and indicate that they are ready to be included in the enterprise catalog.

Stage Partner Offerings Page

Use the Stage Partner Offerings page (EOCM_LOAD_NEW) to consolidate partner offerings and indicate that they are ready to be included in the enterprise catalog.

Navigation:

Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Select a partner catalog.

Stage Partner Offerings

This example illustrates the fields and controls on the Stage Partner Offerings page.

Click **Stage Partner Offerings** to run the staging process.

A process request is submitted. Click the **Process Monitor** link to monitor the status of the request.

see the product documentation for *PeopleTools: Process Scheduler*

Browsing Staged Offerings

This topic discusses how to browse staged partner offerings and browse staged partner offerings by hierarchy. It also discusses how to browse staged enterprise catalog offerings and browse staged enterprise catalog offerings by hierarchy

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Note: The field names and information regarding selected catalogs and offerings displayed on the browse pages vary based on the catalog type.

When you browse partner offerings, you only see offerings for an individual partner and partners will only see their own. When you browse enterprise catalog offerings, you see a consolidated view of all partner offerings. Information on these pages is read-only.

Note: All partner users can browse their own partner offerings. However, partners must be granted privileges to browse enterprise catalog offerings.

Pages Used to Browse Staged Offerings

Page Name	***Definition Name***	***Usage***
Browse Staged Partner Offering Page	EOCM_BRWSE_P_STG	Browse staged offerings for the selected partner.

Page Name	*Definition Name*	*Usage*
Partner Offering Pricing	EOCM_SOFF_SEC	View pricing for the selected partner offering.
Partner Offering	EOCM_BRWSDTL_S_SEC	Browse detailed information for the selected partner offering.
Browse Staged Partner Offerings by Hierarchy Page	EOCM_BROWSEC_TP	Browse the staged version of the selected partner's offerings by category hierarchy.
Browse Staged Enterprise Catalog by Offering Page	EOCM_BROWSE_PROD_S	Browse the staged version of the selected enterprise catalog offerings.
Browse Enterprise Catalog Offerings by Hierarchy Page	EOCM_BROWSEC_TP	Browse the staged version of the selected partner's offerings by category hierarchy.

Related Links

Maintain Catalogs - Partners Page

Browse Staged Partner Offering Page

Use the Browse Staged Partner Offerings page (EOCM_BRWSE_P_STG) to browse staged offerings for the selected partner.

Navigation:

Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Select a staged version of a partner catalog.

Browse Staged Partner Offerings

Categories for This Offering

This grid lists categories assigned to the selected partner offering.

Partner Listings for This Offering

This grid displays information for each partner that offers this product or service.

Field or Control	*Description*
Offering Prices	Click to access the Partner Offering Pricing page and view pricing information for this offering.

Field or Control	*Description*
Offering Details attachments and images viewing	Click to access the Partner Offering Detail page and view details for the selected offering. **Note:** The URL field located on the Partner Offering Detail page contains the URL address from the partner source data file. Click **Open** to link to the URL address in a new browser window. To view attachments in a new browser window go to the Attachments grid and click the **View File** button associated with the desired attachment.
Edit Offering	Click to access the Maintain Partner Data page and manually update offering details.

Browse Staged Partner Offerings by Hierarchy Page

Use the Browse Staged Partner Offerings by Hierarchy page (EOCM_BROWSEC_TP) to browse the staged version of the selected partner's offerings by category hierarchy.

Navigation:

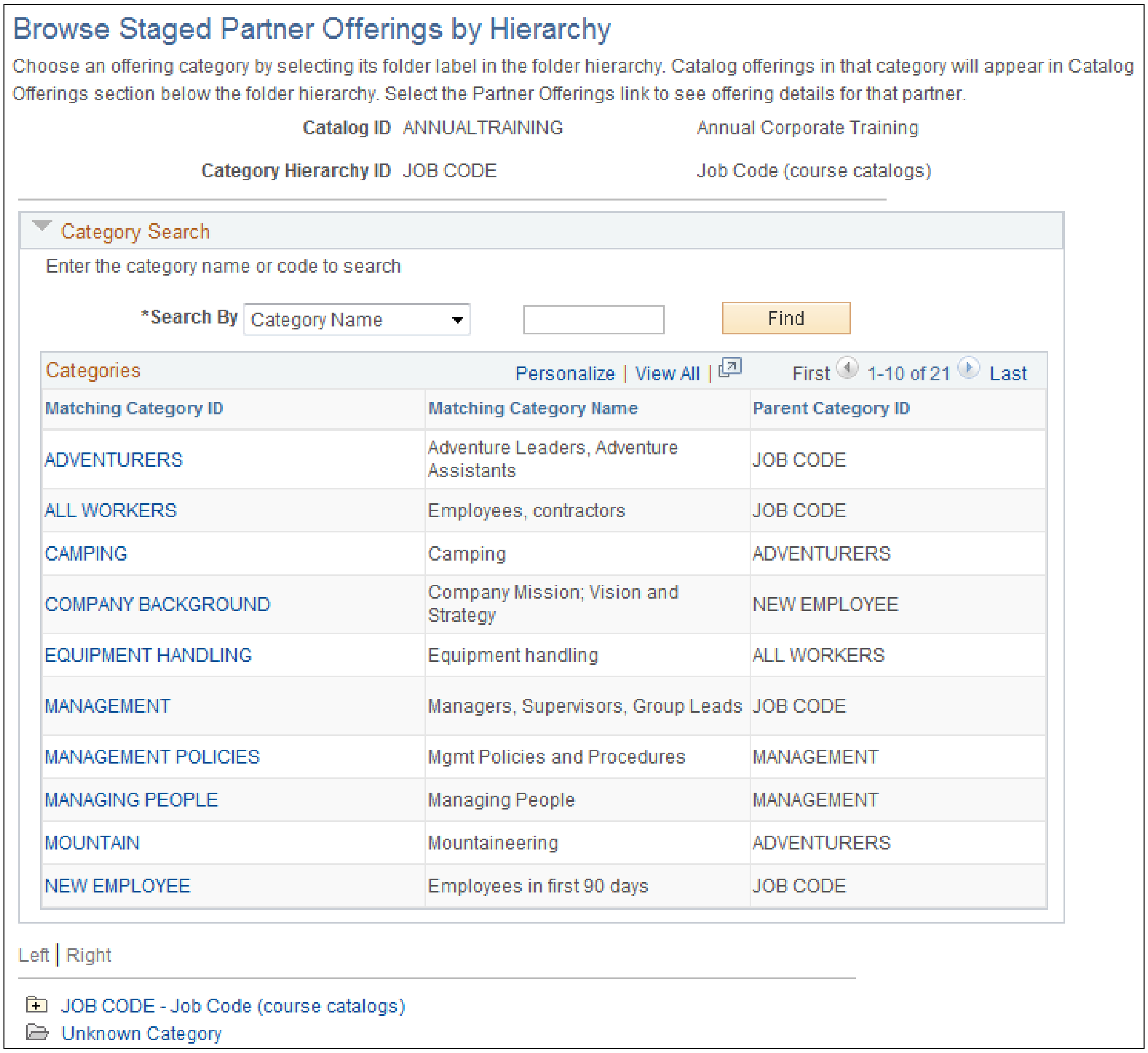
Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Select a staged version of a partner catalog.

Browse Staged Partner Offerings by Hierarchy

This example illustrates the fields and controls on the Browse Staged Partner Offerings by Hierarchy page. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Browse Staged Partner Offerings by Hierarchy page. You can find definitions for the fields and controls later on this page.

Use the **Find Category** feature to locate a specific category, or use the folder icons to navigate through the selected hierarchy. Catalog offerings in a selected category appear in the grid below.

Field or Control	*Description*
Catalog Hierarchy ID	Value reflects the hierarchy selected on the search page. The name of the hierarchy is displayed to the right.
Partner Offerings	Click to access the Browse Staged Partner Offering page and view detail information for the selected offering.

Browse Staged Enterprise Catalog by Offering Page

Use the Browse Staged Enterprise Catalog by Offering page (EOCM_BROWSE_PROD_S) to browse the staged version of the selected enterprise catalog offerings.

Navigation:

Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Browse Staged Enterprise Catalog by Offering

This page is essentially the same as the Browse Staged Partner Offering page.

See Browse Staged Partner Offering Page.

Browse Enterprise Catalog Offerings by Hierarchy Page

Navigation:

Catalog Management > **Catalog Management Home** > **Browse Enterprise Catalog Offerings by Hierarchy**

This page is essentially the same as the Browse Staged Partner Offerings by Hierarchy page.

See Browse Staged Partner Offerings by Hierarchy Page.

Chapter 10

Producing and Syndicating Enterprise Catalogs

Moving Catalogs to Production

This topic discusses how to move catalogs to production status.

Page Used to Move Catalogs to Production

Page Name	***Definition Name***	***Usage***
Move Catalog to Production Page	EOCM_CATALOG_MTP	Move a catalog to production status.

Understanding Catalog Versioning

Because Catalog Management maintains multiple versions of catalogs, you can work on a current version without affecting the production version. When a version of the catalog is successfully moved to production, a new catalog version is automatically created by copying the production version and incrementing the catalog version by one. For example, when catalog version two is moved to production, catalog version three is automatically created from version two. When you go to the Catalog Management homepage, version three is listed as the working copy.

Move Catalog to Production Page

Use the Move Catalog to Production page (EOCM_CATALOG_MTP) to move a catalog to production status.

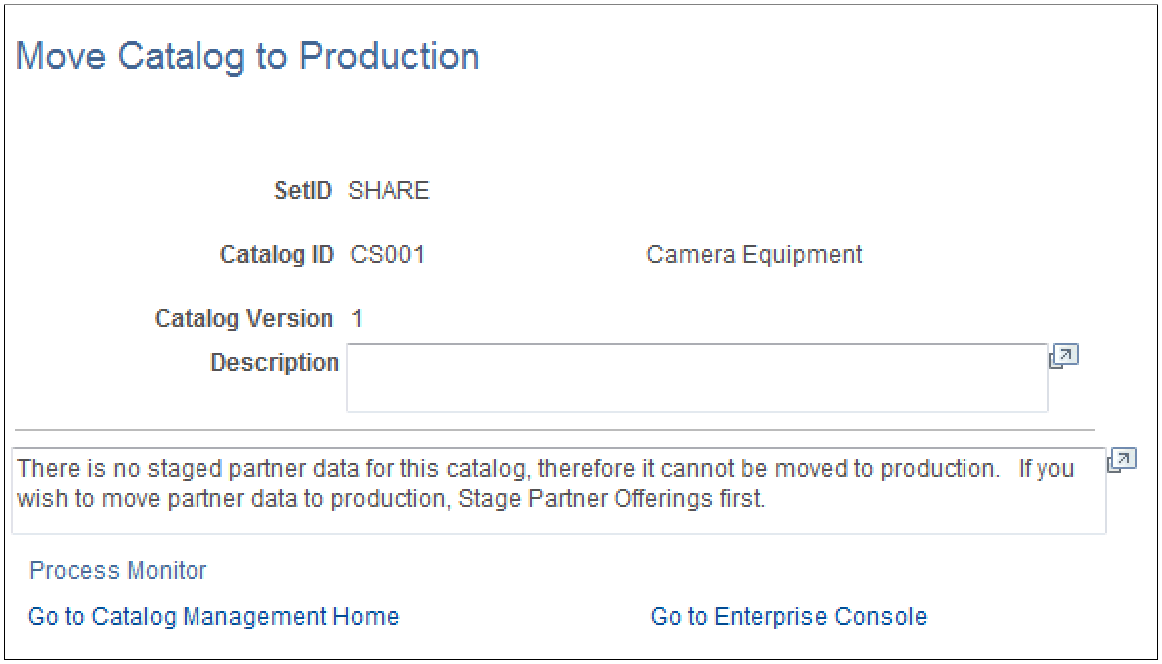
Navigation:

Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Move Catalog to Production

This example illustrates the fields and controls on the Move Catalog to Production page.



Click **Run Move to Production Process** to move the staged working version of the enterprise catalog to production.

A process request is submitted. Click the **Process Monitor** link to monitor its status.

See the product documentation for *PeopleTools: Process Scheduler*

Browsing Production Offerings

This topic discusses how to browse production partner offerings and production partner offerings by category hierarchy. It also discusses how to browse production enterprise catalog offerings and production enterprise catalog offerings by category hierarchy.

Note: The field names and information regarding selected catalogs and offerings displayed on the browse pages vary based on the catalog type.

When you browse partner offerings, you only see offerings for an individual partner and partners will only see their own. When you browse enterprise catalog offerings, you see a consolidated view of all partner offerings. Information contained on these pages is read-only.

Note: All partner users can browse their own partner offerings. However, partners need to be granted privileges to browse enterprise catalog offerings and have access to other partners' catalog data.

Pages Used to Browse Production Offerings

Page Name	***Definition Name***	***Usage***
Browse Production Enterprise Catalog by Offering Page	EOCM_BROWSE_PROD	Browse the production version of the selected enterprise catalog by offering.
Browse Production Enterprise Catalog by Hierarchy Page	EOCM_BROWSECAT_MTP	Browse the production version of the selected enterprise catalog by category hierarchy.
Browse Production Partner Offering Page	EOCM_BRWSE_TP_PROD	Browse the selected partner's offerings within the production version of the selected enterprise catalog.
Browse Production Partner Offerings by Hierarchy Page	EOCM_BROWSETP_MTP	Browse the selected partner's offerings within the production version of the enterprise catalog by category hierarchy.
Offering Details	EOCM_BRWSEDTL_SEC	View offering, pricing, and attachment details for the selected partner offering.

Related Links

Maintain Catalogs - Partners Page

Browse Production Enterprise Catalog by Offering Page

Use the Browse Production Enterprise Catalog by Offering page (EOCM_BROWSE_PROD) to browse the production version of the selected enterprise catalog by offering.

Navigation:

Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Browse Production Enterprise Catalog by Offering

This page is essentially similar to the Browse Staged Enterprise Catalog by Offering page.

See Browse Staged Partner Offering Page.

Browse Production Enterprise Catalog by Hierarchy Page

Use the Browse Production Enterprise Catalog by Hierarchy page (EOCM_BROWSECAT_MTP) to browse the production version of the selected enterprise catalog by category hierarchy.

Navigation:

Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Browse Production Enterprise Catalog by Hierarchy

This page is essentially similar to the Browse Staged Enterprise Catalog by Hierarchy page.

See Browse Staged Partner Offerings by Hierarchy Page.

Browse Production Partner Offering Page

Use the Browse Production Partner Offering page (EOCM_BRWSE_TP_PROD) to browse the selected partner's offerings within the production version of the selected enterprise catalog.

Navigation:

Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Select a partner catalog.

Browse Production Partner Offering

This page is essentially similar to the Browse Staged Partner Offerings page.

See Browse Staged Partner Offering Page.

Browse Production Partner Offerings by Hierarchy Page

Use the Browse Production Partner Offerings by Hierarchy page (EOCM_BROWSETP_MTP) to browse the selected partner's offerings within the production version of the enterprise catalog by category hierarchy.

Navigation:

Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Select a partner catalog.

Browse Production Partner Offerings by Hierarchy

This page is essentially similar to the Browse Staged Partner Offerings by Hierarchy page.

See Browse Staged Partner Offerings by Hierarchy Page.

Rolling Back Catalogs to a Previous Version

This topic discusses how to roll back to a previous catalog version.

Page Used to Roll Back Catalogs to a Previous Version

Page Name	***Definition Name***	***Usage***
Rollback Catalog Page	EOCM_CATALOG_RB	Revert to a previous version of a catalog.

Understanding Catalog Versioning and Rollbacks

You roll back a catalog when there is a problem with the production version. Rollback enables you to overwrite the current catalog version with whatever version is selected as rolling-back.

For example, if the current version is 5, and you rollback to version 3, version 3 overwrites version 5, leaving the current version as 5 with information from version 3.

Note: Once the rollback is through, the previous version 5 becomes nonexistent and not recoverable.

Rollback Catalog Page

Use the Rollback Catalog page (EOCM_CATALOG_RB) to revert to a previous version of a catalog.

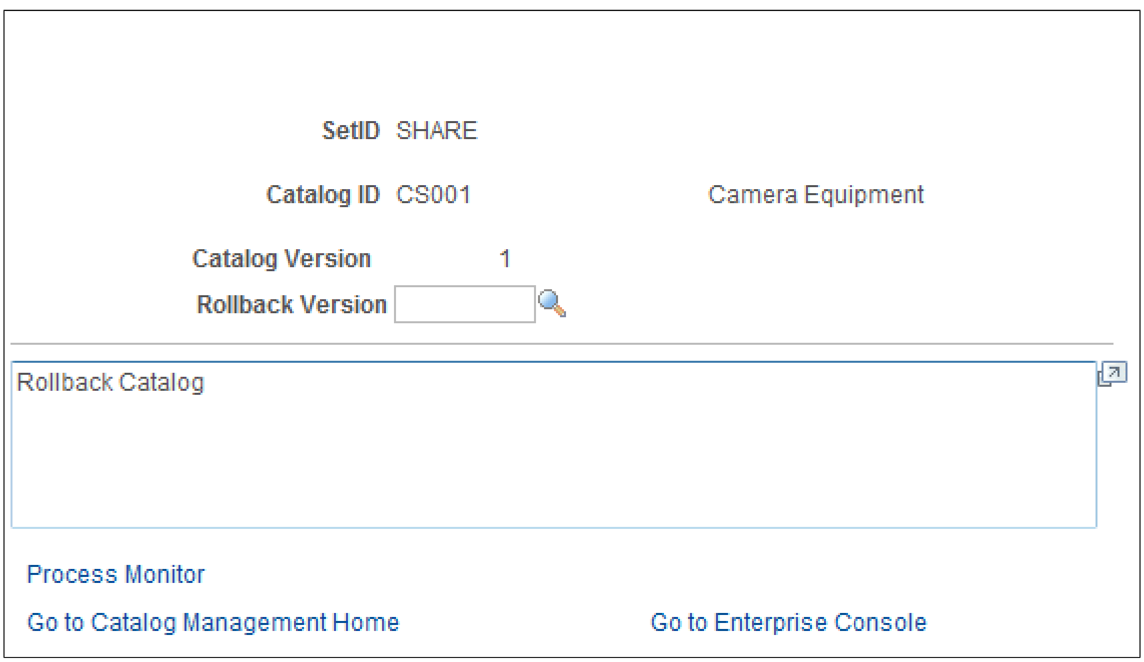
Navigation:

Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Rollback Catalog

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



Field or Control	***Description***
Rollback Version	Select the catalog version to roll back to.
Process Rollback	Click to run the rollback process. A process request is submitted. Click the Process Monitor link to monitor its status.

see the product documentation for *PeopleTools: Process Scheduler*

Syndicating Catalogs

After a catalog has been moved to production, it is ready to be syndicated (distributed) to partners.

Page Used to Syndicate Catalogs

Page Name	***Definition Name***	***Usage***
Syndicate Catalog Page	EOCM_CTLG_SYND	Distribute the catalog to partners.

Syndicate Catalog Page

Use the Syndicate Catalog page (EOCM_CTLG_SYND) to distribute the catalog to partners.

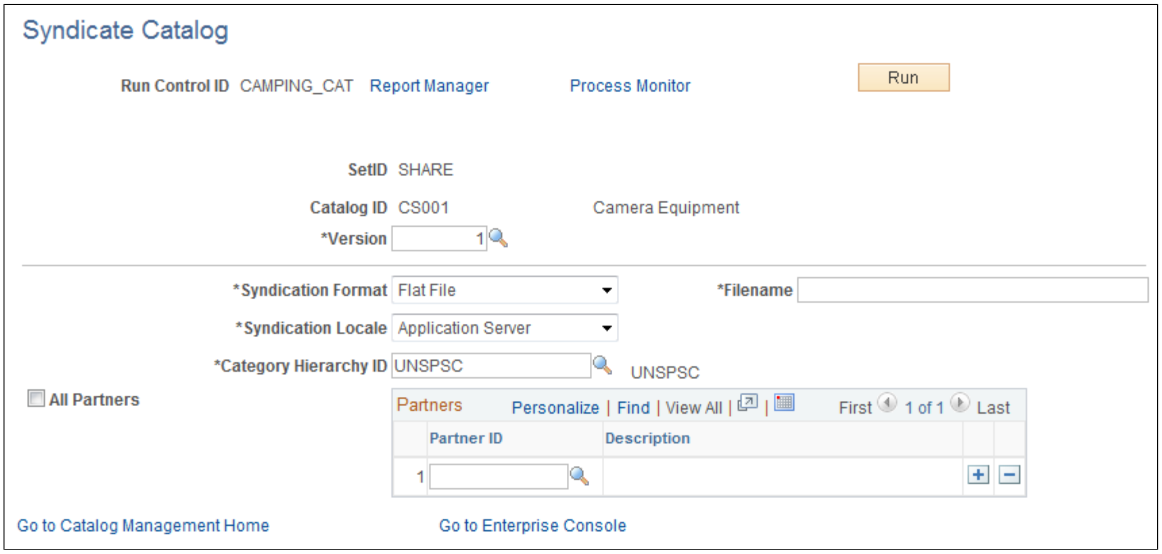
Navigation:

Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Syndicate Catalog

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



Field or Control	***Description***
Version	Select a production version of this catalog.
Syndication Format	Select a format for the syndicated file. Select from *CSV, Flat,* or *xCBL file.* **Note:** If flat file is selected, the category hierarchy structure is not included.
Filename	Enter a description for the syndicated file.
Syndication Locale	Select the distribution location for the file, either *Application Server* or *FTP.*
Category Hierarchy ID	Select the category hierarchy to syndicate. The system automatically selects the hierarchy if only a single hierarchy exists for this catalog.
All Partners	Select to syndicate all partners' offerings in this catalog.
Partner ID	Select partners individually by ID. Only offerings of the selected partners are syndicated.
Run	Click to run the syndication process. The process is submitted. Click the **Process Monitor** link to monitor the status of the process.

See the product documentation for *PeopleTools: Process Scheduler*

Archiving and Purging Catalog Data

This topic discusses how to use the archive/purge catalog data feature, archive enterprise catalog data, purge archived data, and restore archived data.

Page Used to Archive and Purge Catalog Data

Page Name	***Definition Name***	***Usage***
Archive/Purge Catalog Data Page	EOCM_CTLG_ARCH	Archive enterprise catalog data by catalog version. Purge archived data from the system. Restore archived data to online files.

Understanding the Archive Process

Archiving enterprise catalog data allows catalog managers to manage the volumes of data maintained by Catalog Management by moving enterprise catalog data, that is no longer required, to history files. Removing this historical data from online tables prevents the database from increasing to an unmanageable size, and improves overall performance. The purge feature deletes previously archived data from the system. Once purged, the data cannot be restored.

Archive/Purge Catalog Data Page

Use the Archive/Purge Catalog Data page (EOCM_CTLG_ARCH) to archive enterprise catalog data by catalog version.

Purge archived data from the system. Restore archived data to online files.

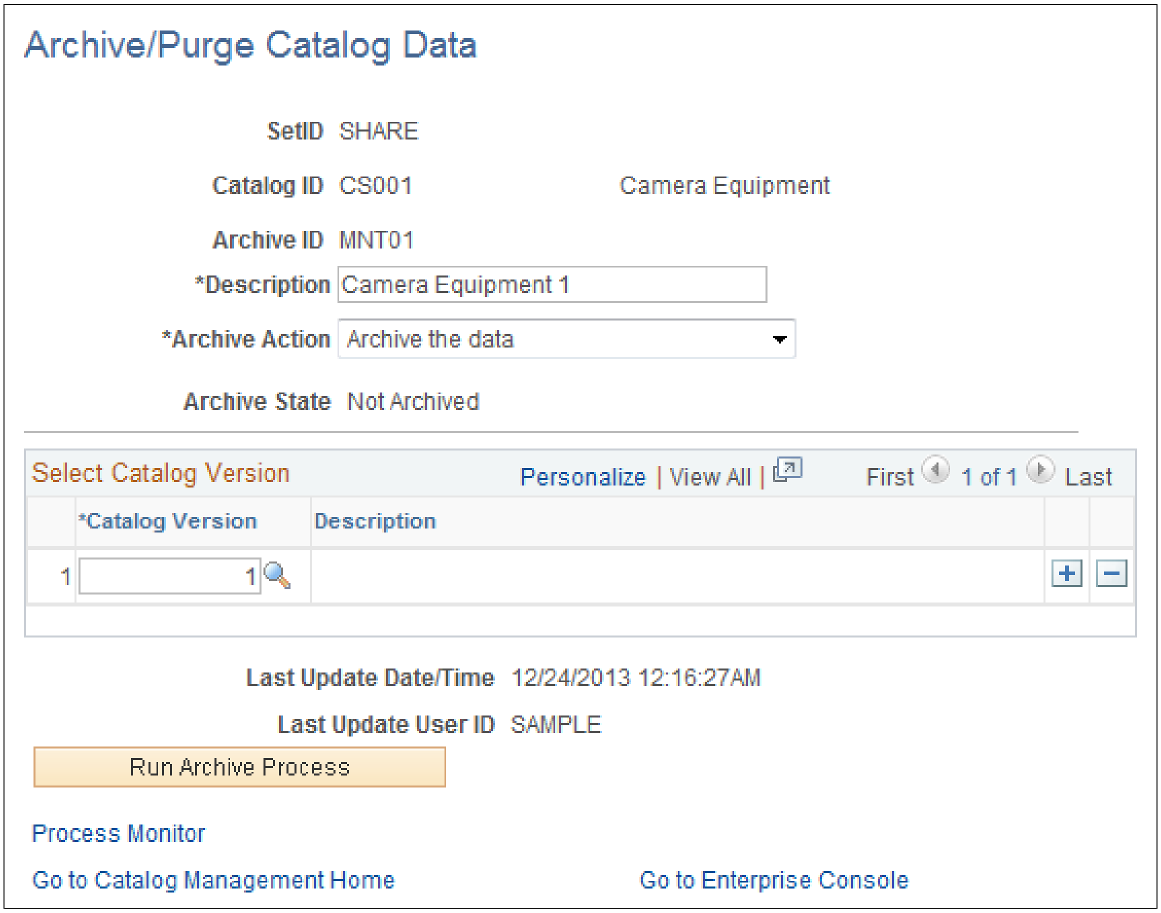
Navigation:

Catalog Management > **Catalog Management Home.**

Select an enterprise catalog.

Archive/Purge Catalog Data.

This example illustrates the fields and controls on the Archive/Purge Catalog Data page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
SetID and **Catalog ID**	Values are based on the enterprise catalog selected on the Catalog Management Home page.
Archive ID	Displays the value entered on the Search page.
Archive Action	Archive action can be one of these options: *Archive the Data:* Copies the data from the online tables into the history table, and then removes the data from the online tables. This is the only option available for data that has not been archived. *Purge from Archive:* Deletes previously archived data from the history table. Once purged, the data cannot be restored. *Restore from Archive:* Moves previously archived data from the history table back to the online tables.
Archive State	Displays the current state of the selected catalog data. States include: *Not Archived, Archived, Purged,* and *Restored.*

Field or Control	***Description***
Select Catalog Version	Select the catalog versions that you want to archive, purge, or restore. The versions available will be based on the selected action.
Run Archive Process	Select to run the application engine EOCM_ARCH archive process. The process is submitted. Click the **Process Monitor** link to monitor the status requests. **Note:** The archive state will change accordingly when the process has successfully completed.

Archiving Enterprise Catalog Data

The archive feature copies the enterprise catalog data from the online tables into the history table, and then removes the data from the online tables. This is the only option available for data that has not been archived.

To archive enterprise catalog data:

1. Go the Archive/Purge Catalog Data page.

   Select the desired archived enterprise catalog version. The displayed archive state is: *Not Archived.*
2. Select the archive action *Archive the Data.*
3. Click **Run Archive Process.**

   The application engine EOCM_ARCH process is submitted.
4. Click the **Process Monitor** link to monitor the status requests.

Note: The archive state will change to *Archived* when the process has successfully completed. The catalog version will no longer be available for selection from Catalog Management.

Purging Archived Data

The purge feature deletes previously archived data from the system. Once purged, the data cannot be restored.

To purge archived data:

1. Go the Archive/Purge Catalog Data page.

   Select the desired archived enterprise catalog version. The displayed archive state is: *Archived.*
2. Select the archive action *Purge from Archive.*
3. Click **Run Archive Process.**

   The application engine EOCM_ARCH process is submitted.

4. Click the **Process Monitor** link to monitor the status of requests.

Note: The archive state will change to *Purged* when the process has successfully completed, and the archive action field will be inactive.

Restoring Archived Data

The restore feature moves previously archived data from the history table back to the online tables.

To restore archived data:

1. Go the Archive/Purge Catalog Data page.

   Select the desired archived enterprise catalog version. The displayed archive state is: *Archived.*

2. Select the archive action *Restore from Archive.*

3. Click **Run Archive Process.**

   The application engine EOCM_ARCH process is submitted.

4. Click the **Process Monitor** link to monitor the status of requests.

Note: The archive state will change to *Restored* when the process has successfully completed. The catalog version will be available for selection from Catalog Management.

Chapter 11

Maintaining Enterprise Catalog and Partner Offerings

Adding or Changing Enterprise Catalog Data

You use the Maintain Enterprise Catalog Data page to manually enter and change data about the enterprise catalog.

Pages Used to Add or Change Enterprise Catalog Data

Page Name	***Definition Name***	***Usage***
Maintain Enterprise Catalog Data Page	EOCM_ADD_PROD	Manually enter and change data about the enterprise catalog and its associated partners' offerings.
Partner Offering Detail page	EOCM_SOFFDTL_SEC	Review associated partner offering information.

Maintain Enterprise Catalog Data Page

Use the Maintain Enterprise Catalog Data page (EOCM_ADD_PROD) to manually enter and change data about the enterprise catalog and its associated partners' offerings.

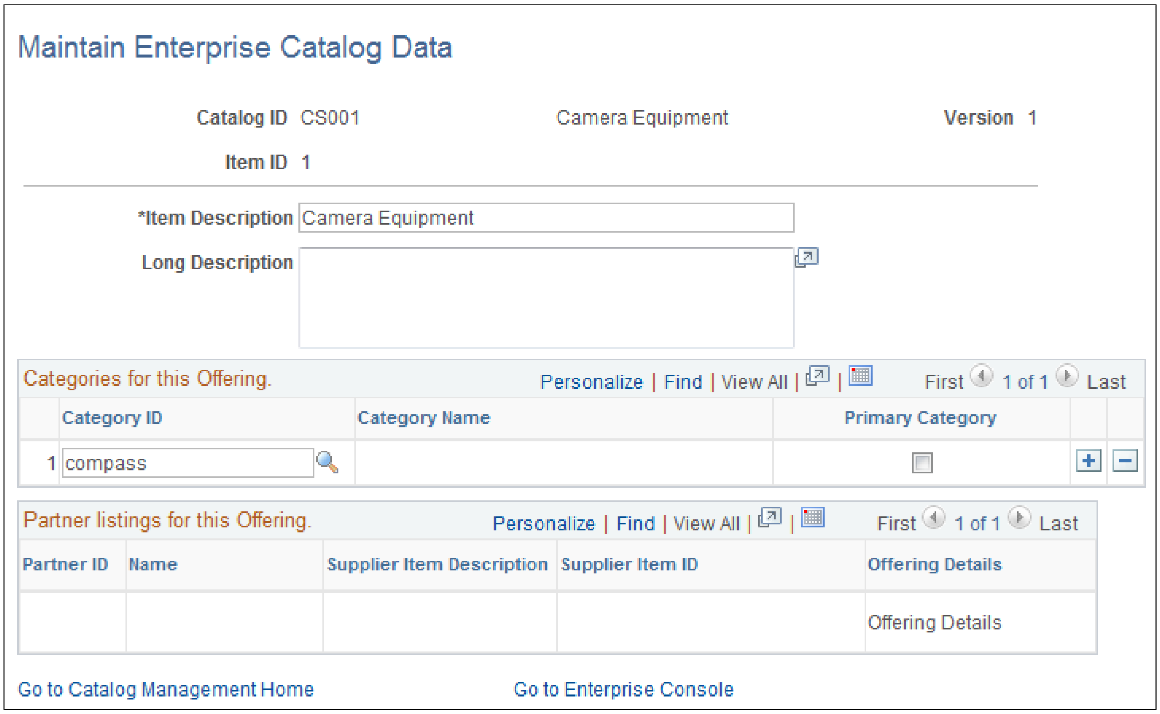
Navigation:

Catalog Management > **Catalog Management Home**

Select an enterprise catalog

Maintain Enterprise Catalog Data

This example illustrates the fields and controls on the Maintain Enterprise Catalog Data page.



You use this page to:

- Add new catalog offerings.
- Modify catalog offering descriptions.
- Add, remove, or change categories.
- Review associated partner offerings.

Note: New catalog offerings are added to the current working version of the enterprise catalog. Any catalog offerings that have been manually added can only be updated when they are either staged or in production.

Field or Control	***Description***
Category ID	Change the existing category or add a new category.
Primary Category	Select to indicate the offering's primary category. This is the category used for Supply Chain Management.
Offering Details	Click to access the Partner Offering Detail page and view more information about an offering.

Adding or Changing Partner Offering Data

You use the Maintain Partner Offering Data page to manually enter and change data about partner offerings.

Page Used to Add or Change Partner Offering Data

Page Name	***Definition Name***	***Usage***
Maintain Partner Data Page	EOCM_ADD_TP_PROD	Manually enter and change data about partner offerings.

Maintain Partner Data Page

Use the Maintain Partner Data page (EOCM_ADD_TP_PROD) to manually enter and change data about partner offerings.

Navigation:

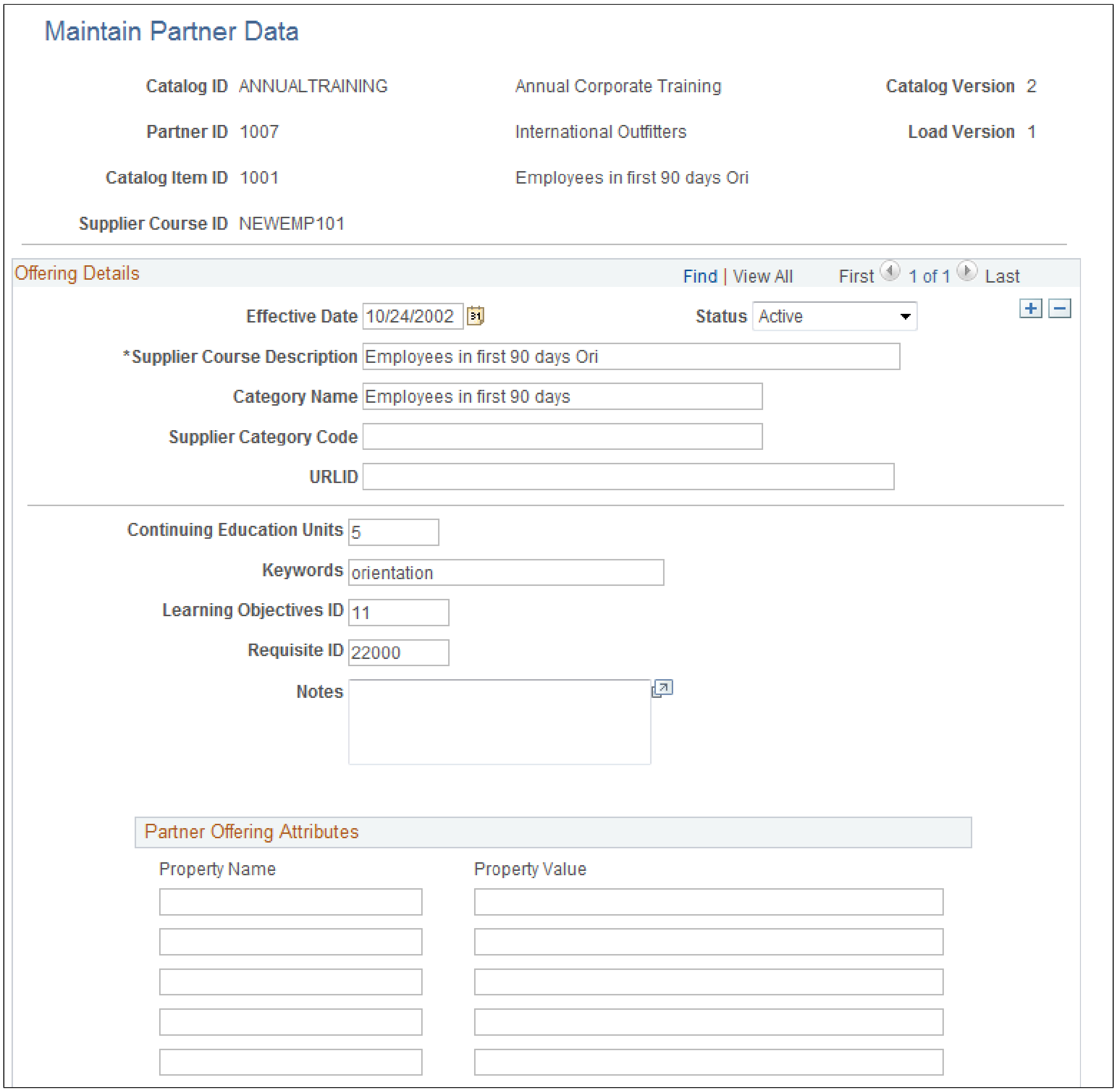
Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

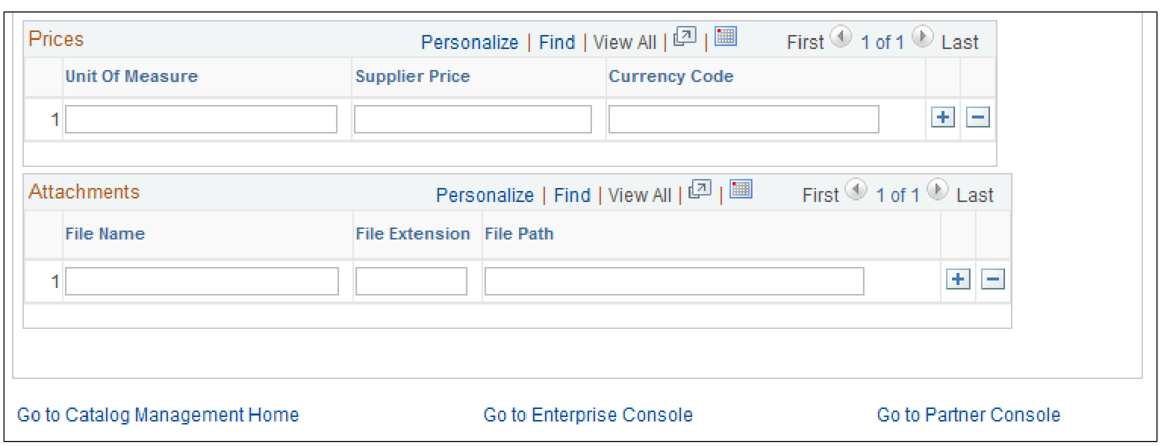
Select a partner catalog.

Maintain Partner Data

This example illustrates the fields and controls on the Maintain Partner Data page.



This example illustrates the fields and controls on the Maintain Partner Data page.



Use this page to:

- Add new partner offerings.
- Modify current partner offering detail information.
- Change effective date information for an existing partner offering.

To prevent errors, you should be familiar with the format and the field type for each value you need to update before adding or changing partner offering detail information.

Note: These functions can be performed in any existing version of a partner catalog. The selected version can be in created, loaded, categorized, staged, or production.
A warning message appears when you attempt to save changes to partner offerings that are part of a production enterprise catalog.

Offering Details

The fields here correspond with the catalog map definition for the selected partner source. Modify any field or add more units of measure with associated prices and currency codes. You can also add a new effective-dated record.

Chapter 12

Comparing Versions of Partner Catalogs

Generating Comparison Reports

You can compare two versions of a partner catalog.

Page Used to Generate Comparison Reports

Page Name	***Definition Name***	***Usage***
Compare Versions Page	EOCM_COMPARE_VER	Compare two partner catalog versions.

Compare Versions Page

Use the Compare Partner Versions page (EOCM_COMPARE_VER) to compare two partner catalog versions.

Navigation:

Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Select the newer of the partner catalogs that you want to compare.

Compare Versions

Field or Control	***Description***
Compare partner version *n* **to partner version**	Select the second partner versions to compare. **Note:** Only partner versions that are earlier than the version selected on the Enterprise Catalog Console page are available.
Field Name	Select the check boxes associated with attributes that you want to compare. The list of attributes is based on catalog type. The report includes only those offerings that have differences between the selected versions, considering only the attributes selected. **Note:** Avoid selecting all fields for a single report, as this can create many rows and increase report generation time.

Field or Control	*Description*
Generate Report	Click to generate the comparison report. The Process Scheduler Request page is displayed.

See the product documentation for *PeopleTools: Process Scheduler*

Viewing Comparison Reports

You can filter comparison results to analyze the data most effectively.

Page Used to View Comparison Reports

Page Name	*Definition Name*	*Usage*
View Report Page	EOCM_VIEW_VERSIONC	View comparison data between two partner catalog versions.

View Report Page

Use the View Report page (EOCM_VIEW_VERSIONC) to view comparison data between two partner catalog versions.

Navigation:

Catalog Management > **Catalog Management Home**

Select an enterprise catalog.

Select the newer of the partner catalogs that you want to compare.

Compare Versions > **View Report**

If you do not need this data again, click Delete Report to remove the report from the system.

Numeric Filter

You can filter comparison results by a selected numeric field based on an amount or percent difference. For example, results can be displayed in the filtered rows view if the supplier price of an offering shows a difference greater than 10.00.

Field or Control	*Description*
Numeric Field	Select a numeric field. Only numeric fields selected for comparison are available.

Field or Control	***Description***
Amount Difference and **Percent Difference**	To apply a filter: 1. Select to filter by amount or percent. 2. Select an operator. Choose from: • Less than. • Less than or equal to. • Equal to. • Greater than. • Greater than or equal to. 3. Enter the amount or percent difference to filter by.
Filter Rows	Click to view results based on the filter criteria entered.
All Rows	Click to remove any previous filtering and view results without filtering.

Results

For each offering in the partner catalog that contains differences, the Results grid displays the fields selected for comparison.

Field or Control	***Description***
Max Rows	Enter the maximum number of rows, no greater than 300, to display in the Results grid.
Supplier Item ID	Click the ID to access the Maintain Partner Data page for that offering and update the data. **Note:** The Maintain Partner Data information updates the newer version of the catalog. Any updates made are not seen on the comparison report until it has been regenerated.

View Values Tab

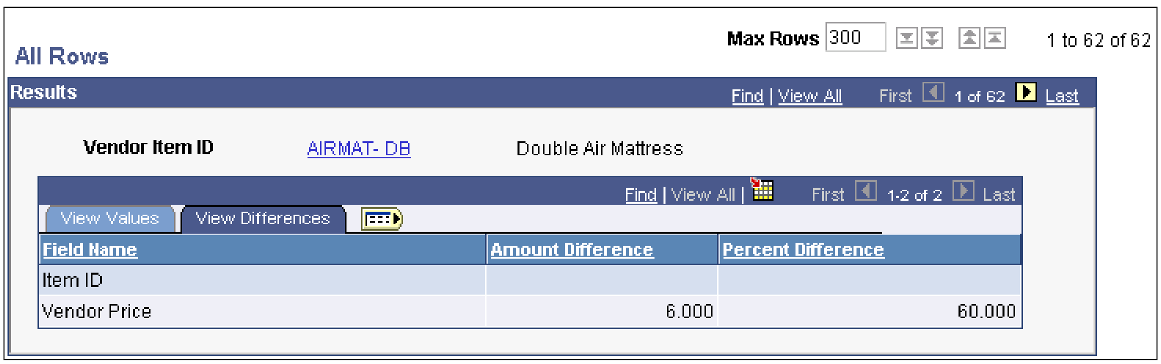
Select the View Values tab.

Field or Control	***Description***
Version <Newer Catalog Version Number> Value	Displays the value found in the newer catalog version for the associated field.
Version <Older Catalog Version Number> Value	Displays the value found in a previous catalog version for the associated field.

View Differences Tab

Select the **View Differences** tab.

This example illustrates the fields and controls on the View Report page: View Differences tab. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Amount Difference	Displays the amount difference from the older version to the newer version, for numeric fields only.
Percent Difference	Displays the percent difference from the previous version to the newer version, for numeric fields only.

Related Links

Maintain Partner Data Page

Chapter 13

Using Component Interfaces

Using Component Interfaces to Access Components

A component interface is a PeopleTools object created in Application Designer. It allows you to access a PeopleSoft component from another application, a PeopleSoft application engine program, or another external application. The application can simultaneously update a component's underlying data and use its business logic without knowing the details of page structures or component definitions.

The Maintain Catalog Partners and Maintain Categories components, delivered with Catalog Management, use component interfaces to update partner registration and category information, respectively.

Suppose you want to create 500 new categories. You can use PeopleCode to call the EOCM_CATEGORY_CI component interface to load the data more efficiently into the EOCM_CATEGORY table using an excel spreadsheet or another application.

PeopleSoft provides component interfaces for the following areas in Catalog Management:

Component Interface	***Description***
EOTP_QUICKPARTNER_CI	Maintain Partner Registration
EOCM_CATEGORY_CI	Maintain Categories

See the product documentation for

PeopleTools: Component Interfaces

Chapter 14

Setting Security Options For Workflow

Setting User Profile Attributes

Workflow settings and a valid primary email address must be specified for all Catalog Management users who need to receive notifications.

To specify workflow settings and a primary email address:

1. Select PeopleTools, Security, User Profiles, User Profiles, Workflow.
2. Select **Routing Preferences for Worklist User and Email User.**
3. Select the General tab.
4. Click the **Edit Email Address** link.
5. Select the email type, and select the **Primary Email Account** check box.

   Workflow notification emails will be sent to this email address.

See the product documentation for *PeopleTools: Security Administration*

Setting Permissions

PeopleSoft delivers the EOCM1500 (partner users), and EOCM6500 (enterprise catalog managers) permission lists. These permission lists enable users to perform specific catalog management activities. Permissions are preconfigured as:

- Component interfaces.
- PeopleSoft Query access groups and profiles.

To set the permissions for these permission lists:

1. Select PeopleTools, Security, Permissions & Roles, Permission Lists.
2. Select a permission list.
3. Access the Component Interfaces page.
4. Select *EOCM_CATEGORIZE_CI* and assign full access to all methods.
5. Access the Query page.
6. Make sure that the access group permissions are set to with these options:

The tree name is *QUERY_TREE_EOCM.*

The access group is *EOCM_ACCESS_GROUP.*

The Accessible check box is selected.

7. For the query profile, make sure that the **Only allowed to run queries** check box is selected.

Note: If you create permission lists for partner users and enterprise catalog managers, you must also perform these steps for those lists.

See the product documentation for *PeopleTools: Security Administration*

Defining Role Options

PeopleSoft delivers predefined workflow roles, including Catalog Partner and Enterprise Catalog Manager, which are assigned to partner and enterprise catalog manager users.

To define role options for workflow:

1. Select PeopleTools, Security, Permissions & Roles, Roles, Workflow.
2. Select the **Use Query to Route Workflow** check box.
3. Select *EOCM_ROLE_QUERY* for the query name.

Creating a New Enterprise Catalog Manager Role

To associate the Enterprise Catalog Manager role with the workflow step object:

1. Select Application Designer, Activity.
2. Open *EOCM_APPROVE_CAT_OFF.*
3. Right-click and select Approve Offerings WL, Item Properties.
4. In the Worklist Definition window, click the **Field Mapping** button.
5. In the Field Map window, double-click **OPRID** to open the Map Field window.
6. Select the role name created for the enterprise catalog manager.
7. Click **Specify Bind Variables** to open the Specify Query Bin Variables window.

   Verify the *SetID* and *EOCM_CATALOG_ID* are listed as bind variables.

   Note: If they are not listed, define the role options for workflow.

See the product documentation for *PeopleTools: Security Administration*

Updating SMTP Settings

SMTP settings must be modified to enable email notifications. This task must be performed for the application server and the Process Scheduler server.

See the product documentation for *PeopleTools: Process Scheduler*

Chapter 15

Setting Automatic Daily Partner Cleanup

Understanding Daily Partner Cleanup

All partners must be registered and have the required services and users assigned before they can be associated with a catalog in Catalog Management. If a registered partner terminates the partnership, these cleanup operations are performed automatically:

- Assigned services are deleted.
- Assigned users are deleted.
- User profiles are deleted.
- Partner status is changed to *Ended Partnership.*

The Application Engine batch process (EOCM_TRDP_AE) runs at a scheduled time to monitor changes in partner status. If a partner's registration has been terminated, this process sets Catalog Management partner status to *Inactive* and deletes partner users from their associated catalogs.

PeopleSoft delivers a Process Scheduler recurrence schedule, EOCM Daily Partner Cleanup, as an example.

Initiating Automatic Daily Partner Cleanup

This section discusses how to:

- Set the recurrence schedule.
- Set process definition options.
- Initiate the Application Engine process request.

Once the request is initiated, the process runs automatically at the scheduled time without any user intervention.

Setting the Recurrence Schedule

To set the recurrence schedule:

1. Select PeopleTools, Process Scheduler, Recurrences.
2. Open the recurrence titled EOCM Daily Partner Cleanup.
3. Provide parameters for the Recurrence Pattern, Start Request, End Request, and Repeat regions.

4. In the Schedule Next Recurrence when section, select Current Request is Initiated.

Setting Process Definition Options

To define process definition options for the EOCM_TRDP_AE process:

1. Select PeopleTools, Process Scheduler, Processes.
2. Select the EOCM_TRDP_AE process.
3. Access the Process Definition Options page.
4. Enter the following information:

Field or Control	***Description***
Server Name	Enter a valid Process Scheduler server name.
Recurrence Name	Select *EOCM Daily Partner Cleanup.*
Component	Select *AE_REQUEST.*
Process Groups	Select *EOCMALL.*

Initiating the Application Engine Process Request

To initiate automatic daily partner cleanup:

1. Select PeopleTools, Application Engine, RequestAE.
2. When adding the new run control, select *EOCM_TRDP_AE* for the program name.
3. On the Application Engine Request page, select *Always* in the Process Frequency field.

   This selection automatically runs the process on the defined recurrence schedule.
4. Click Run to initiate the request.

See the product documentation for *PeopleTools: Process Scheduler* and

PeopleTools: Application Engine

