
PeopleSoft FSCM 9.2: PeopleSoft eProcurement

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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.

<i>Typographical Convention</i>	<i>Description</i>
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W , hold down the Alt key while you press the W key.
. . . (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.

<i>Typographical Convention</i>	<i>Description</i>
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

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

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

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

Region and Industry Identifiers

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

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

- USF (U.S. Federal)

- E&G (Education and Government)

Translations and Embedded Help

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

Using and Managing the PeopleSoft Online Help

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

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft FSCM Related Links

[Oracle Help Center](#)

[Hosted Online Help](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

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

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[PeopleSoft Business Process Maps \(Microsoft Visio format\)](#)

[PeopleSoft Spotlight Series](#)

Contact Us

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

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

Follow Us

<i>Icon</i>	<i>Link</i>
	<u>Watch PeopleSoft on YouTube</u>
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	<u>Read PeopleSoft Blogs</u>
	<u>Connect with PeopleSoft on LinkedIn</u>

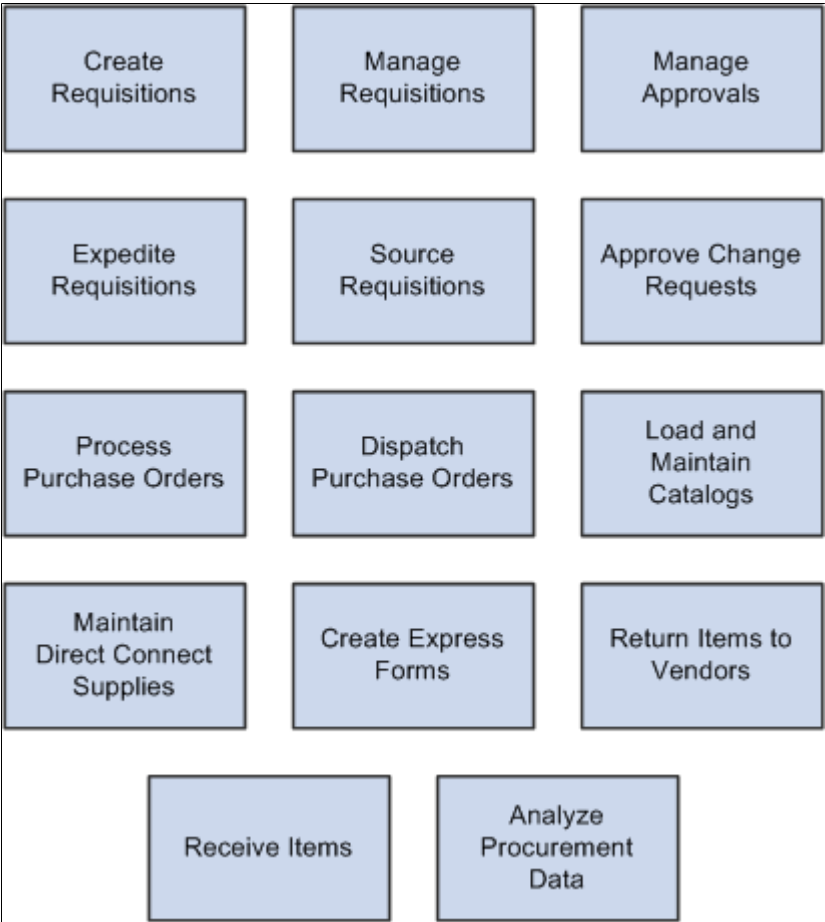
Getting Started with PeopleSoft eProcurement

Oracle's PeopleSoft eProcurement Business Processes

PeopleSoft eProcurement is designed to help you requisition items. This method helps reduce out-of-system purchasing, also known as maverick purchasing. PeopleSoft eProcurement helps enforce contract purchasing as well as capture spending information for future analysis. By improving requisition creation and usage, employee training is simplified, which reduces the total cost of ownership.

The diagram shows the PeopleSoft eProcurement business processes including the actions involving requisitions, change requests, approvals, purchase orders, catalogs, and receipts:

The diagram shows the PeopleSoft eProcurement business processes.

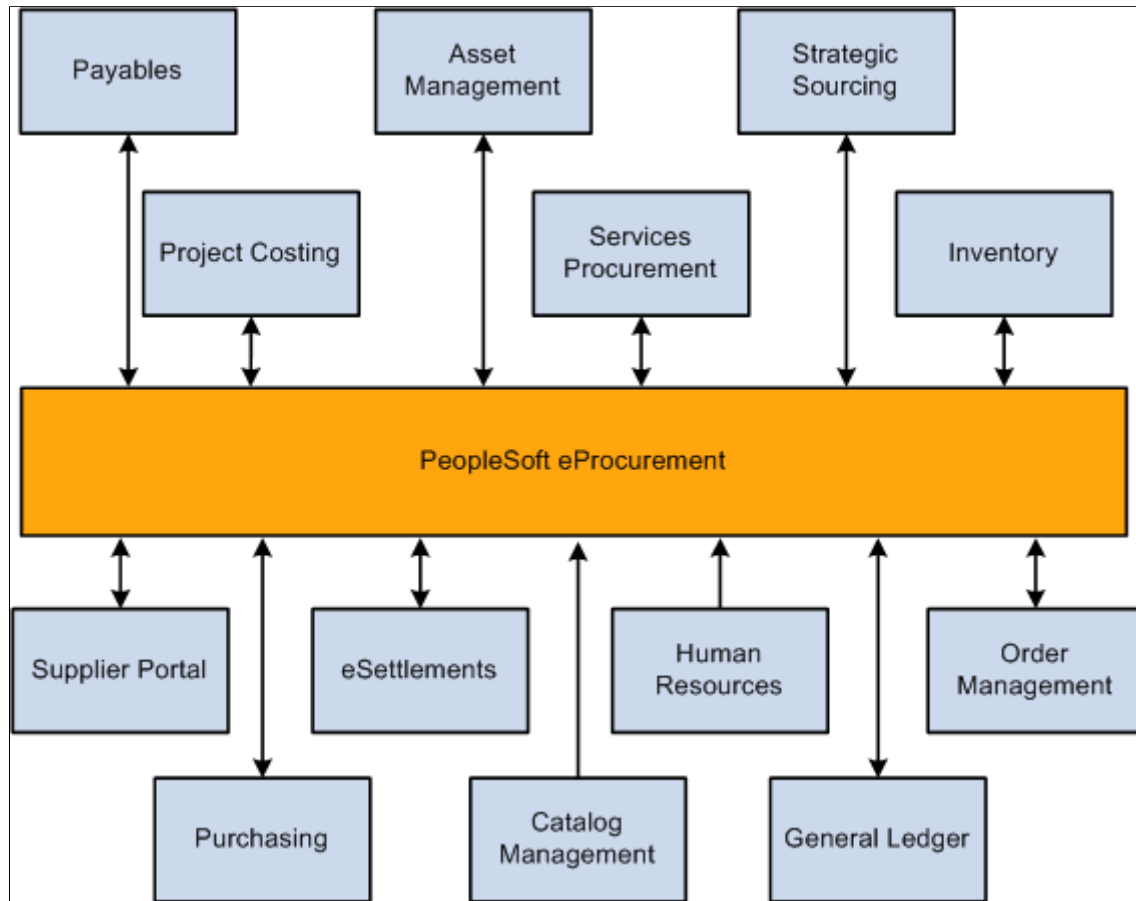


The business process topics in this documentation discuss these business processes.

eProcurement Integrations

This diagram shows how PeopleSoft eProcurement integrates with other PeopleSoft applications within PeopleSoft Financials and Supply Chain Management and PeopleSoft HRMS:

This diagram shows how PeopleSoft eProcurement integrates with other PeopleSoft applications.



As a standalone product, PeopleSoft eProcurement facilitates the process of procuring and managing resources. As an integrated solution, it enhances the existing PeopleSoft Services Procurement, Catalog System, and PeopleSoft HRMS functionality.

PeopleSoft applications interact with one another, sharing the same relational data structures and many of the same core tables. If you are not ready to implement other PeopleSoft applications, you can use PeopleSoft eProcurement as a standalone product, interfacing it with your existing accounting and distribution applications. Because PeopleSoft eProcurement is part of an enterprise solution, it is designed for transparent integration with PeopleSoft Supply Chain Management, PeopleSoft Financials, and PeopleSoft Human Capital Management.

PeopleSoft Payables

The interaction of PeopleSoft eProcurement and PeopleSoft Payables data and processing enables you to match vouchers with all purchase order and receiver details. You can automatically generate debit memos for goods that are returned to a supplier.

PeopleSoft Asset Management

A direct link with PeopleSoft Asset Management streamlines the entry of asset information. Seamless interaction between PeopleSoft eProcurement, PeopleSoft Asset Management, and PeopleSoft Payables enables you to pass asset information, capitalize assets at point of receipt, process modifications to existing assets, and create work orders for maintenance of the asset. Requisitions and purchase orders can be created to acquire parts and services for specific work orders that are associated with the asset.

PeopleSoft Strategic Sourcing

PeopleSoft eProcurement integrates with PeopleSoft Strategic Sourcing to generate contracts and purchase orders. You create requisitions using PeopleSoft eProcurement to send out for bids. This facilitates the collaboration between buyers and suppliers of goods and services, and reduces costs by accepting competitive bidding for goods and services.

PeopleSoft Project Costing

PeopleSoft eProcurement creates requisitions based on project activity requests in PeopleSoft Project Costing and returns ordered material transactions to PeopleSoft Project Costing as committed costs.

PeopleSoft Services Procurement

Integration between PeopleSoft eProcurement and PeopleSoft Services Procurement enables users to have a single common interface to requisition both goods and services. A hiring manager can order a configured workstation and standard office supplies, along with the skills-based request, all from the same requisition.

PeopleSoft Inventory

Close integration between PeopleSoft eProcurement and PeopleSoft Inventory enables you to share common item definitions and set up items from one menu for both PeopleSoft eProcurement and PeopleSoft Inventory. Using the Quick Sourcer feature, you can create material stock requests to fill requisitions from inventory stock.

PeopleSoft Supplier Portal

PeopleSoft eProcurement integrates with the Supplier Portal through the dispatch process. Using the Supplier Portal, buyers can collaborate more efficiently with their suppliers.

PeopleSoft eSettlements

PeopleSoft eProcurement integrates with PeopleSoft eSettlements to enable suppliers to enter invoices against POs that have been generated from PeopleSoft eProcurement.

PeopleSoft Human Resources

PeopleSoft eProcurement incorporates an application message that enables automatic updates to the system from a PeopleSoft HRMS database. Relevant changes to employee data in the JOB record can result in the creation of new requesters in eProcurement. Changes to roles, departments, business units, and database access can also be updated.

PeopleSoft Order Management

When PeopleSoft Order Management requires that incoming or purchased items be reserved for a specific customer sales order, PeopleSoft eProcurement uses pegging functionality to directly ship the items to the customer, or to ship to an inventory location as reserved for the customer order.

PeopleSoft Purchasing

Close integration between PeopleSoft eProcurement and PeopleSoft Purchasing enables you to share common control data, such as item definitions for both PeopleSoft eProcurement and PeopleSoft Purchasing. It enables you to create requisitions, purchase orders, receipts, and other transactions that will be stored in shared tables. The combination offers a complete solution for direct, indirect, service, and project purchases in an integrated environment.

PeopleSoft Catalog Management

PeopleSoft eProcurement delivers a comprehensive integration to PeopleSoft Catalog Management. Catalog content may be aggregated from multiple suppliers and then loaded into the PeopleSoft Item Master table. This provides a uniform mechanism for ordering goods from multiple suppliers that would otherwise be represented in disparate formats.

PeopleSoft General Ledger

PeopleSoft eProcurement interacts with PeopleSoft General Ledger for budget checking and commitment control. With this integration, you can ensure that funds are available for requisitions before they are submitted.

Other Sources of Integration Information

The integration considerations are discussed in the implementation sections in this documentation.

Supplemental information about third-party application integrations is located on Oracle's My Oracle Support website.

eProcurement Implementation

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

Other Sources of Information

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

Related Product Documentation

This section discusses:

- Where to find additional information for PeopleSoft eProcurement.
- Delivered ChartFields.

Where to Find Additional Information for PeopleSoft eProcurement

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

These companion documentations contain information that applies specifically to PeopleSoft eProcurement:

- *PeopleSoft Application Fundamentals*
- *PeopleSoft Setting Up Global Options and Reports.*
- *PeopleSoft Setting Up and Using Commitment Control.*
- *PeopleSoft Purchasing.*
- *PeopleSoft Managing Procurement.*
- *PeopleSoft Managing Items.*
- *PeopleSoft Working with Third-Party Applications.*

Delivered ChartFields

This table describes the ChartFields delivered for this PeopleSoft application:

Grid Order	Label Long Name	Label Short Name	ChartField Name	Field Length	Active or Inactive	Definition
1	Account	Account	ACCOUNT	10	Active	Classifies the nature of a transaction. This field is required. Use it for corporate accounts.

Grid Order	Label Long Name	Label Short Name	ChartField Name	Field Length	Active or Inactive	Definition
2	Alternate Account	Alt Acct	ALTACCT	10	Active	Classifies the nature of a transaction for regulatory authorities. Use it for statutory accounting.
3	Operating Unit	Oper Unit	OPERATING_UNIT	8	Active	Can be used to indicate a location, such as a distribution warehouse or a sales center.
4	Fund Code	Fund	FUND_CODE	5	Active	The primary structural units of Education and Government accounting.
5	Department	Dept	DEPTID	10	Active	Tracks information according to a divisional breakdown of the organization. This value can be used to indicate who is responsible for or affected by a transaction.
6	Program Code	Program	PROGRAM_CODE	5	Active	Tracks revenue and expenditures for programs within or across the organizations. This value can be used to identify groups of related activities, cost centers, revenue centers, responsibility centers, and academic programs.

Grid Order	Label Long Name	Label Short Name	ChartField Name	Field Length	Active or Inactive	Definition
7	Class Field	Class	CLASS_FLD	5	Active	When combined with a Fund, Organization, Program Code, and Budget Reference, identifies the activity for an appropriation.
8	Budget Reference	Bud Ref	BUDGET_REF	8	Active	Use to identify unique budgets when individual budgets share budget keys and overlapping budget periods.
9	Product	Product	PRODUCT	6	Active	Captures additional information useful for profitability and cash flow analysis by product sold or manufactured.
10	Project ID/Grant	Project	PROJECT_ID	15	Active	• Captures additional information useful for grant and project accounting. • The Project ChartField does not have effective dating.
99	ChartField 3	<i>Variable</i>	CHARTFIELD3	10	Inactive	Generic expansion ChartField is delivered Inactive. It can be configured for use, hidden, or deleted.

Grid Order	Label Long Name	Label Short Name	ChartField Name	Field Length	Active or Inactive	Definition
99	ChartField 2	<i>Variable</i>	CHARTFIELD2	10	Inactive	Generic expansion ChartField is delivered Inactive. It can be configured for use, hidden, or deleted.
99	ChartField 1	<i>Variable</i>	CHARTFIELD1	10	Inactive	Generic expansion ChartField is delivered Inactive. It can be configured for use, hidden, or deleted.
11	Affiliate	Affiliate	AFFILIATE	5	Active	Used to map transactions between business units when using a single interunit account.
12	Fund Affiliate	Fund Affil	AFFILIATE_INTRA1	10	Active	Use to correlate transactions between funds when using a single intraunit account.
13	Operating Unit Affiliate	Oper Unit Affil	AFFILIATE_INTRA2	10	Inactive	Use to correlate transactions between operating units when using a single intraunit account.
14	Statistics Code	Statistics Code	STATISTICS_CODE	3	Active	Identifies non-monetary statistical amounts. Statistic codes are associated with a specific unit of measure.

Grid Order	Label Long Name	Label Short Name	ChartField Name	Field Length	Active or Inactive	Definition
15	Scenario	Scenario	BD_SCENARIO	10	Active	Identifies different budget iterations that use different assumptions.
16	Currency Code	Currency Code	CURRENCY_CD	3	Active	Identifies currencies; for example, FRF for French francs.
17	Book Code	Book Code	BOOK_CODE	4	Active	Identifies subsets of ledger rows to segregate and maintain in the same ledger various accounting, recording and reporting requirements for transactions in different accounting environments.
18	Adjustment Type	Adjustment	GL_ADJUST_TYPE	4	Active	Use to define adjustment types associated with varying accounting treatments of prior period adjustments.

Common Elements Used in eProcurement

Field or Control	Description
Amount	Displays the total item price and the transaction currency from the requisition.
Account	Change this value only to change the standard accounting structure.

Field or Control	Description
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Free-flow text up to 30 characters.
Due Date	The date on which the items are scheduled to arrive at the Ship To location.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
 (Embedded Help)	Click the Embedded Help icon to open up a secondary window with information about this page or section. Embedded help can provide information about specific fields and point the user to additional help. See <i>PeopleTools: Applications User's Guide</i> for more information on creating and modifying embedded help.
GL Unit (general ledger unit)	Displays the PeopleSoft General Ledger business unit that is defined on the Purchasing Definition - Business Unit Definition page.
Item Description	The item description as defined on the Purchasing Attributes page.
Language or Language Code	The language in which you want the field labels and report headings of reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Percent	Enter a percentage of the quantity or the amount to distribute. The system updates either the Amount or Quantity field value, depending on the selection in the Distribute by field.
Price	Displays the supplier's unit price and currency for the item, which are assigned on the Supplier's UOM & Pricing Info (supplier's unit of measure and pricing information) page.
Product	Identifies a product. If you use PeopleSoft Project Costing, a Project ID link replaces this field.

Field or Control	Description
Project ID	Click to access the Projects Information page, where you can enter any information that is relevant to the project. This field appears only if you are using PeopleSoft Project Costing.
Process Frequency (group box)	Designates the appropriate frequency in the Process Frequency group box: <i>Once</i> executes the request-one time only-the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. <i>Always</i> executes the request every time the batch process runs. <i>Don't Run</i> ignores the request when the batch process runs.
Process Monitor	This link takes you to the Process List page, where you can view the status of submitted process requests.
Report ID	The report identifier.
Report Manager	This link takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	A request identification that represents a set of selection criteria for a report or process.
Requisition	The means for ordering goods and services.
Run	Click this button to take you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An identification code that represents a set of control table information or TableSet. A TableSet is a group of tables (records) necessary to define the organizational structure and processing options.
Ship To	The location code that indicates the location where the supplier should deliver the items.
Shopping Cart	A tool used to create requisitions. The cart displays requisition line items, their quantities, and cost.
Short Description	Free-flow text up to 15 characters.

Field or Control	Description
Status	The options in this field are <i>Active</i> or <i>Inactive</i> . By linking status and effective date, you can retain historical information and plan future implementation. For auditing purposes, Oracle encourages inactivating data that is no longer in use instead of deleting it.
User ID	The system identifier for the individual who generates a transaction.

See the product documentation for

PeopleTools: Applications User's Guide

PeopleTools: Process Scheduler

Navigating in PeopleSoft eProcurement

Navigating in PeopleSoft eProcurement

PeopleSoft eProcurement provides a custom navigation center page that contains a grouping of folders that support the activities of an organizational buyer, specific to business processes and tasks.

Note: In addition to the custom navigation center page, PeopleSoft eProcurement provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

PeopleTools: Applications User's Guide

Pages Used to Navigate in PeopleSoft eProcurement

This table lists the custom navigation pages that you use to navigate in the PeopleSoft eProcurement Procurement Card Center.

The Procurement Card Center custom navigation pages are intended for the person in the organization who is responsible for all aspects of the Procurement Card, including setup and maintenance.

<i>Page Name</i>	<i>Navigation</i>	<i>Usage</i>
Procurement Card Center	eProcurement > Procurement Card Center	Access the primary Procurement Card Center menu and activities.
Inquire Procurement Card Request	Click the Request Procurement Card link on the Procurement Card Center page.	Add new or inquire existing procurement card requests.
Statement Summary	Click the Review Bank Statement link on the Procurement Card Center page.	View statement summaries by credit card supplier, billing date, or status.
Reconcile	Click the Reconcile link on the Procurement Card Center page.	Access the Reconcile Statement and Review Disputes menu options on the Reconcile page.
Process Statements	Click the Process Statements on the Procurement Card Center page.	Access the Load ProCard Stage, Load Statement, Correct Errors, Load Voucher Stage, Budget ChartField Validation, Bank Statement Has Arrived, and Grace Period Has Expired menu options on the Process Statements page.

Page Name	Navigation	Usage
List of Merchants	Click the Preferred Suppliers link on the Procurement Card Center page.	Define preferred suppliers by associating a merchant with a specific supplier.
Review Disputes - Procurement Card Transactions	Click the Review Disputes link on the Procurement Card Center page.	Review and enter comments for disputed transactions.
Correct Errors	Click the Correct Errors link on the Procurement Card Center page.	Review and correct errors for statements loaded to the staging tables.
Reports	Click the Reports link on the Procurement Card Center page.	Generate reports for procurement card summary and exception reporting. Reports include: Account Summary, Cardholder Information, Expected Credits, Purchase Details, Purchase Exceptions, Credit Detail By MCG, Non-Preferred Supplier, Top Supplier Chains, Top Merchant Category, and MCC Exceptions (merchant category code exceptions).
Security	Click the Security link on the Procurement Card Center page.	Define roles, access rights, proxies and SpeedCharts for procurement cards. Menu options include: Register Roles, Assign Access Rights, Assign Proxies, and Assign SpeedCharts.
Definitions	Click the Definitions link on the Procurement Card Center page.	Define procurement card setup data such as card profiles and card-issuing banks. Menu options include: Cardholder Profile, Preferred Suppliers, and UOM Mappings.

Note: In this release of eProcurement the left hand menu navigation will not appear by default. To make the left hand menu navigation appear navigate to **PeopleTools** > **Portal** > **General Settings**. On General Settings page select Navigation Type as Left and click the Save button. Now the left hand menu navigation will appear constantly till you change the Navigation Type setting.

See the product documentation for
PeopleTools: Portal Technology

Navigating in PeopleSoft eProcurement Implementation

PeopleSoft eProcurement provides navigation pages that you can use to find implementation tasks.

Note: In addition to the custom navigation center pages, PeopleSoft eProcurement provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

Pages Used to Navigate in PeopleSoft eProcurement Implementation

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Administer Procurement Page</u>	PV_ADM_MAIN	This page provides links to all functional and technical setup pages that you need to complete the PeopleSoft eProcurement installation.
<u>Procurement Setup Guide - Default Page</u>	PV_ADM_SETUP_GUIDE	PeopleSoft eProcurement delivers the setup guide to provide sequential steps to enable users to implement PeopleSoft eProcurement and link to the pages that define organizational structure in PeopleSoft applications.

PeopleTools: Applications User's Guide

Determining Technical Implementation Options

Understanding PeopleSoft eProcurement System Administration

Specific implementation and maintenance tasks are targeted to system administrators. The system contains links to technical setup pages for the overall PeopleSoft implementation.

Many of these links are to the PeopleSoft general installation, PeopleTools, PeopleSoft Workflow approvals pages, and PeopleSoft eProcurement specific implementation pages.

Working with the Administer Procurement Component

To define eProcurement technical setup, use the Administer Procurement component (PV_ADM_PNL_GRP).

This section discusses how to access the technical setup pages for implementation, set up an eProcurement setup guide ID and description, work with the setup guide, and view results for key word searches.

Pages Used to Work with the Administer Procurement Component

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Administer Procurement Page</u>	PV_ADM_MAIN2	Access the pages that are needed to implement and maintain PeopleSoft eProcurement.
<u>Maintain Procurement Setup Guide ID Page</u>	PV_ADM_PROJECT	Establish setup guide IDs to use a separate checklist for implementation in each department in the PeopleSoft Procurement and Workflow setup guides.
<u>Procurement Setup Guide - Default Page</u>	PV_ADM_SETUP_GUIDE	Provide a procedural step-by-step listing of pages that you can review for the initial functional setup of business units, codes, accounting structure, procurement options, suppliers, items, and users.

Page Name	Definition Name	Usage
Administer Procurement - Search Result Page	PV_ADM_SRCH_RESULT	View the results of the search for key words in the title, menu name, or description of an implementation or maintenance page that is linked to the Administer Procurement Main page.

Administer Procurement Page

Use the Administer Procurement page (PV_ADM_MAIN) to provide links to all functional and technical setup pages that you need to complete the PeopleSoft eProcurement installation.

Navigation:

eProcurement > Administer Procurement

This example illustrates the fields and controls on the Administer Procurement page (1 of 2).

Administer Procurement

Description Search

[Procurement Setup Guide](#)

System Administration

[Maintain Overall System Options](#)
Installation Options, File Attachment Servers, Admin Procurement Menu Items and Admin Page Links

[Maintain Backbone Interlinks](#)
Jobcodes and Role Definition; Create Operators

[Maintain System Users and Roles](#)
Permission Lists, Roles, User Types, User Profile, eProcurement Role Action Assignment

[Maintain Workflow](#)
Requisition and Change Request Approval, Approval Escalation, Receipt Notification, Workflow Roles and Approval Users

[Maintain Supplier Integration](#)
Marketplace Buyers and Suppliers, Validate and Process CUP (Catalog Upload Process) Data, Direct Connect Suppliers, Define and Build Search Indices

[Run eProcurement Processes](#)
Run all eProcurement processes in Requisitions, Purchase Orders, Receiving, Marketplace, Workflow, Pcard, etc.

This example illustrates the fields and controls on the Administer Procurement page (2 of 2).

Maintain Procurement

Maintain Business Units
TableSet IDs, Purchasing Business Unit definitions and options, etc.

Maintain Codes
Unit of Measure, Locations, Tax, Shipping, Comments, Commodity, File Location, etc.

Maintain Accounting Structure
Accounts, Departments, Products, SpeedCharts, Entry Template, Statistics Code, etc.

Maintain Procurement Options
Requisitions, Purchase Orders, Receiving, and Procurement Cards Setup Options, etc.

Maintain Suppliers
Supplier Profile(name, address, contact, location), Supplier Control, Procurement Card Suppliers

Maintain Items
Manufacturers, Item Families/Groups, Definition, Purchasing Kits, Approval, etc.

Maintain Procurement Users
User Preferences, Buyers, Requesters, Employee Profile

Maintain Catalogs
Maintain Catalog Security and other Catalogs related information.

This is the main page for implementation and maintenance of PeopleSoft eProcurement. You can redesign this page to fit the organizational structure. To access the **System Administration** region of this page, the user profile (**PeopleTools > Security > User Profiles > User Profiles > Roles**) must be linked to the role name, *ePro Admin*.

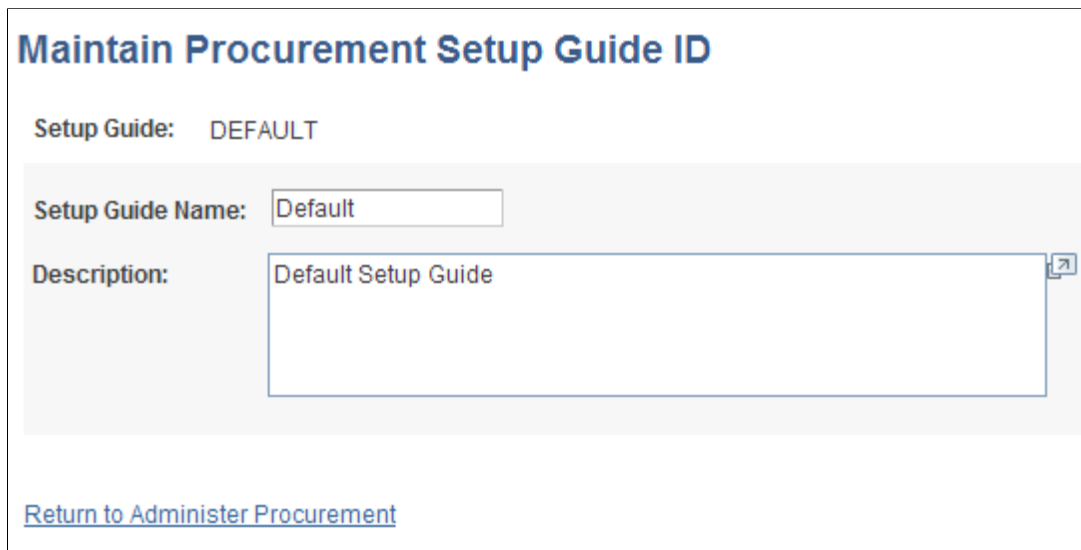
Maintain Procurement Setup Guide ID Page

Use the Maintain Procurement Setup Guide ID page (PV_ADM_PROJECT) to establish setup guide IDs to use a separate checklist for implementation in each department in the PeopleSoft Procurement and Workflow setup guides.

Navigation:

eProcurement > Administer Procurement > Maintain Overall System Options > Setup Guide

This example illustrates the fields and controls on the Maintain Procurement Setup Guide ID page.



Maintain Procurement Setup Guide ID

Setup Guide: DEFAULT

Setup Guide Name:

Description:

[Return to Administer Procurement](#)

Use this page to establish setup guide IDs to use a separate checklist for implementation in each department in the PeopleSoft procurement and workflow setup guides. Enter the setup guide name and a description in the appropriate fields. Click **Save** when you are finished.

Procurement Setup Guide - Default Page

Use the Procurement Setup Guide - Default page (PV_ADM_SETUP_GUIDE) to deliver the setup guide to provide sequential steps to enable users to implement PeopleSoft eProcurement and link to the pages that define organizational structure in PeopleSoft applications.

Navigation:

eProcurement > Administer Procurement

Click the **Procurement Setup Guide** link.

Click the **Default** link.

This example illustrates the fields and controls on the Procurement Setup Guide page (partial page shot).

Procurement Setup Guide - Default

This page provides a procedural step-by-step listing of pages you may go through for the initial setup activities for PeopleSoft eProcurement. As you click on the hyperlink to go to a particular page, the check box next to it will be automatically checked. This indicates that you have accessed the page via this setup guide. You could also uncheck the box if you are not done with the step.

☒ 1 Business Units
 ☒ 2 Codes
 ☒ 3 Accounting Structure
 ☒ 4 Procurement Options
 ☒ 5 Suppliers
 ☒ 6 Items
 ☒ 7 Users

check boxes to start over with the procurement setup process.

Part 1-A: Setup Business Unit (Create) Personalize | Find | First 1-3 of 3 Last

☐	Step 1:	Create Business Unit	Create a new purchasing business unit.
☐	Step 2:	TableSet ID	Setup TableSet ID
☐	Step 3:	TableSet Control	Define relationship between Business Units, TableSet IDs and Record Groups

Part 2: Setup Codes Personalize | Find | First 1-16 of 16 Last

☐	Step 1:	Units of Measure	Setup Units of Measure
☐	Step 2:	Countries	Setup Country Codes
☐	Step 3:	States	Setup State Codes
☐	Step 4:	Tax Authorities	Setup Sales Tax Authorities
☐	Step 5:	Tax Codes	Setup Sales Tax Codes
☐	Step 6:	Location Codes	Setup Location Codes

PeopleSoft eProcurement delivers a setup guide that provides sequential steps that enable users to implement PeopleSoft eProcurement and link to the pages that define organizational structure in PeopleSoft applications. Access the setup guide by entering a setup guide ID. Define separate IDs for different implementation teams, departments, or individuals based on their work tasks. The system is delivered with a default setup guide ID.

Related Links

“PeopleSoft Purchasing Implementation” (PeopleSoft Purchasing)

Administer Procurement - Search Result Page

Use the Administer Procurement - Search Result page (PV_ADM_SRCH_RESULT) to view the results of the search for key words in the title, menu name, or description of an implementation or maintenance page that is linked to the Administer Procurement Main page.

Navigation:

eProcurement > Administer Procurement

Click the **Search** button.

This example illustrates the fields and controls on the Administer Procurement - Search Result page (partial page shot).

Select the **Portal Registry** option to expand the search for key words to the entire PeopleSoft implementation.

Configuring the Administration and Maintenance Pages

This section provides an overview of how you can modify the administration and maintenance pages to reflect the implementation approach and discusses how to configure the Administer Procurement Main page and change the setup guide and second-level links for the Administer Procurement Main page.

Pages Used to Configure the Administration and Maintenance Pages

Page Name	Definition Name	Usage
<u>Maintain the Administration Page</u>	PV_ADM_PAGE_TBL	Configure the Administer Procurement Main page: change titles, change descriptions, and reorder steps.
<u>Administer Procurement Menu Items Table Page</u>	PV_ADM_ITEM_TBL	Change the second level of links (or steps) for the System Administration region on the Administer Procurement Main page.

Understanding How You Can Modify the Administration and Maintenance Pages to Reflect the Implementation Approach

You can change the administration and maintenance pages to reflect the organization's approach to implementation. To do this, PeopleSoft enables you to:

- Reorder the administrative steps.
- Remove some administrative steps.
- Display different page links.
- Rename the titles and links.

Maintain the Administration Page

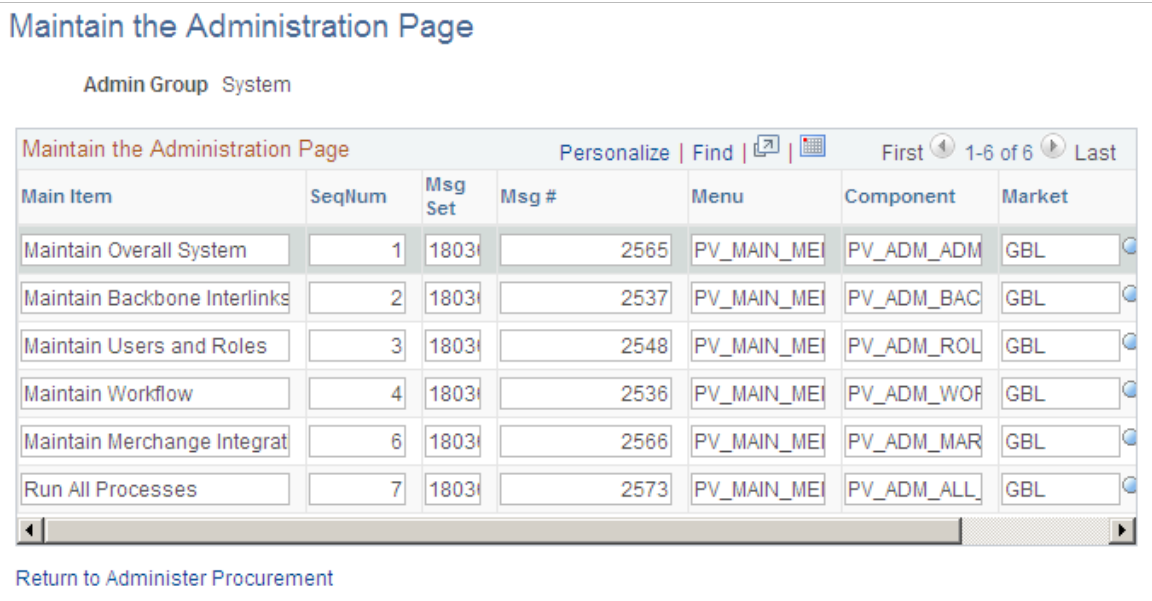
Use the Maintain the Administration page (PV_ADM_PAGE_TBL) to configure the Administer Procurement Main page: change titles, change descriptions, and reorder steps.

Access is limited to users with the SYSTEM_ADMIN eProcurement role action.

Navigation:

eProcurement > Administer Procurement > Maintain Overall System Options > Maintain the Administration Page

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



Use the administration group values, *System* and *Procurement*, to configure the **System Administration** and **Maintain Procurement** regions on the Administer Procurement Main page.

Field or Control	Description
Main Item	Displays the title for each option (group of steps) on the Administer Procurement Main page.
SeqNum (sequence number)	Displays the order in which the steps appear on the Administer Procurement Main page.

Field or Control	Description
Msg Set (message set)	Displays the message catalog that was delivered with PeopleSoft eProcurement.
Msg # (message number)	Displays the message that contains the title and description for each step. You can change the message numbers to use messages that you create.
Menu, Component, and Market	Select the component to which you want the user to transfer.

Related Links

[Understanding PeopleSoft eProcurement System Administration](#)

Administer Procurement Menu Items Table Page

Use the Administer Procurement Menu Items Table page (PV_ADM_ITEM_TBL) to change the second level of links (or steps) for the System Administration region on the Administer Procurement Main page.

Access is limited to users with the SYSTEM_ADMIN action role.

Navigation:

eProcurement > Administer Procurement > Maintain Overall System Options > Maintain Administration Menu Items

This example illustrates the fields and controls on the Administer Procurement Menu Items Table page. You can find definitions for the fields and controls later on this page.

Administer Procurement Menu Items Table

Admin Item Code ADM-02 Description eProcurement Processes

Administer Procurement Menu Items Table Personalize | Find | | First 1-7 of 7 Last

Admin Item Description Menu Navigation Setup

Step #	Sub Item	Sub-item Group	Msg Set	Msg #	Menu Item		
2	Buyer Station Pr	NONE	18036	2497	PV_MAIN_MENU		
3	MarketSite Proc	NONE	18036	2496	PV_MAIN_MENU		
4	Pcard Processe	NONE	18036	2499	PV_MAIN_MENU		
5	Receiving and R	NONE	18036	2498	PV_MAIN_MENU		
6	Requisition Proc	NONE	18036	1103	PV_MAIN_MENU		
7	Workflow Proces	NONE	18036	2471	PV_MAIN_MENU		
8	Education and G	EG	18036	3651	PV_MAIN_MENU		

Message catalog entries are required with the same Sub Item name for the links to be displayed in Administer eProcurement. Education and Government related processes are grouped under the "EG" Sub-item Group.

[Return to Administer Procurement](#)

After you configure the Administer Procurement Main page, you can define the links that appear on the page.

Field or Control	Description
Admin Item Code (administration item code)	Define a section for the Administer Procurement Main page. Values are: <i>ADM-01</i>: Accounting. <i>ADM-02</i>: eProcurement processes. <i>ADM-03</i>: Backbone Interlink <i>ADM-04</i>: Business units. <i>ADM-05</i>: Codes. <i>ADM-06</i>: Items. <i>ADM-07</i>: Merchants integration. <i>ADM-08</i>: Overall system options. <i>ADM-09</i>: Procurement options. <i>ADM-10</i>: Publishing rules. <i>ADM-11</i>: System users and roles. <i>ADM-12</i>: Suppliers. <i>ADM-13</i>: Workflow. <i>ADM-14</i>: Procurement users. <i>ADM-15</i>: Maintain catalogs.

Admin Item Description Tab

Select the Admin Item Description (administration item description) tab.

Field or Control	Description
Step # (step number)	Designates the order in which the steps appear on the Procurement Setup Guide page, which contains this information: business unit, codes, accounting, procurement options, suppliers, items, and procurement users.
Sub Item	Assigns a reference name to the steps for this administration item code. For example, <i>ADM-05</i> lists sub-item 1 names, such as units of measure, tax codes, and location codes.

Field or Control	Description
Sub-item Group	Lists predefined groups (or subheadings) on the established page. For example, the Maintain Business Units page has two groups (subheadings): General Setup and Setup Purchasing Business Units. The sub-item groups are SetID and BU (business unit). You can restrict a sub item by using the Maintain group, which removes it from the admin setup guide but not from the Maintain Business Units page.
Msg Set (message set)	Displays the message catalog that was delivered with PeopleSoft eProcurement.
Msg # (message number)	Displays the message that contains the title and description for each step. You can change the message numbers to use messages that you write.
Menu Items	Defines the location for the step item.

Menu Navigation Setup Tab

Select the Menu Navigation Setup tab.

The fields on this tab link the step to a PeopleSoft table. The bar name establishes a connection to the step table location.

PeopleTools: Applications User's Guide

Understanding Search Framework Search Engine

The Oracle PeopleSoft Search Framework provides a standard method to use search indexes for all PeopleSoft applications. The Search Framework depends on the Search Framework search engine.

This section discusses:

- Search Category
- Search Definition
- Connected Queries and Regular Queries
- Terminology

Search Category

The Search Category is the highest level object in the Search framework. It is comprised of one or more Search Definitions. All the searches in the application are performed against Search Categories. In the search criteria if one particular search category is not specified then Search Framework searches across

all categories defined in the Search Framework instance. For global search it is necessary to set up search categories as Search Groups.

The search category used in eProcurement for all searches is EP_PV_MASTERITEMVENDOR_CAT.

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

The screenshot shows the 'General Settings' tab for the search category 'EP_PV_MASTERITEMVENDOR_CAT'. The settings include:

- Search Category Name:** EP_PV_MASTERITEMVENDOR_CAT
- *Description:** Catalog Items
- Duplicates:** Use API (dropdown menu)
- Search Group:** ☐ (checkbox)
- Object Owner ID:** eProcurement (dropdown menu)

Below the settings is a table of search definitions:

*Search Definition	Description		
EP_PV_EXPRESSITEM	eProcurement Express Items	+	-
EP_PV_MASTERITEMV	eProcurement Items with Suppliers	+	-
EP_PV_MASTERITEM	eProcurement Items without Suppliers	+	-

A 'Save' button is located at the bottom left of the form.

The eProcurement search category is exposed to global searches. All available items in the Search Framework repository is displayed in the search result for global search. However, related action and item detail are only available to the items that the requester has access to based on the catalog security setup.

Note: A new search category called EP_CATALOG_ITEMS was created for global searches. This search category has the same search definitions as EP_PV_MASTERITEMVENDOR_CAT.

Search Definitions

Search Definitions are a critical component of the Search Framework. The main objective of the search definition is data extraction. A search definition must be linked to either a PeopleSoft query or a PeopleSoft connected query.

Three search definitions are linked to the eProcurement search category EP_PV_MASTERITEMVENDOR_CAT. They are:

- EP_PV_MASTERITEMVENDOR_SD (Items attached to Suppliers)
- EP_PV_MASTERITEM_SD (Items not attached to Suppliers)
- EP_PV_EXPRESSITEMS_SD (Express Catalog Items)

Note: For FSCM Update Image 42, EP_PV_MASTERITEMVENDOR_SD and EP_PV_MASTERITEM_SD are certified for Real Time Indexing (RTI). EP_PV_EXPRESSITEMS_SD does not support RTI.

For more information on Real Time Indexing, see *PeopleTools: Using Real Time Indexing*, “Understanding Real Time Indexing in FSCM” (Application Fundamentals).

Connected Queries and Regular Queries

In eProcurement every search definition is attached to a Connected Query. A connected query is a hierarchical ordering of the existing queries. For example:

- Search Definition - EP_PV_MASTERITEMVENDOR_SD, Connected Query - PV_SRCH_MST_ITM_CQRY
- Search Definition - EP_PV_MASTERITEM_SD, Connected Query - PV_SRCH_MST_ITEM_N_CQRY
- Search Definition - EP_PV_EXPRESSITEMS_SD, Connected Query - PV_SRCH_EXPRITEM_CQRY

The level 0 query is the most important as it is the driver query for data extraction. Every row found at level 0 becomes a document in the Search Framework repository. All other queries provide additional data that could be present or missing in the repository. Multiple rows at lower level, results in repeating attributes that will be indexed. There is no concept of parent/child data in the Search Framework repository for a document.

Facets

Facets are fields that are used to filter search results such as business unit, a field date, a system assigned transaction number, and so on.

Below is a list of facets delivered for eProcurement:

- PV_PREF_VNDR (Preferred Supplier)
- NAME1_VENDOR (Supplier Name)
- CATDESCR_SES_LABEL (Category Description)
- DESCR60_SES-MFG-DESCR (Manufacturer Name)
- PV_CATEGORYPATH (Category Path)

Facet PV_CATEGORYPATH is required and should not be removed from the facet list in the search category. It is necessary to define at least one facet in addition to PV_CATEGORYPATH.

Terminology

This table lists terminology related to the PeopleSoft Search feature:

Term	Definition
Search Group	A flag on Search Category that makes the category available in the Application Search bar in the portal header. Search Groups help manage search definitions deployed in Search Framework and provide a way to combine them into functional groups that the user will understand. Selecting these functional groupings enables the user to narrow the scope of their search and thereby reduce the number of search results that they need to review.
Search Pages	A keyword search that is specific to an application component.
Search Attribute	Search attributes are the basic building blocks of Search Framework data. A search attribute is mapped from a query field. Search Framework identifies three types of attributes - string, numeric, and date/time. An Search Framework document can have multiple data indexed with the same attribute name.

For information on Search Framework settings see [Setting Up Installation Options](#).

For information on how item search works in eProcurement see [Creating Requisitions](#).

See the product documentation for

PeopleTools: Search Technology

“Understanding Financials and Supply Chain Search” (Application Fundamentals)

Click to view a short video about [PeopleSoft Global Search](#).

Real Time Indexing Switch

RTI Batch Switch allows you to set a threshold that is checked by a set of delivered batch programs. When a batch program is enabled and the threshold is exceeded, RTI is disabled until the next incremental build.

To set the threshold for your organization, access the Configure Real Time Indexing page to and enter a value for beyond which RTI will be temporarily disabled. This page will also allow you to see which batch programs are delivered by eProcurement for the RTI Switch.

See *PeopleTools: PeopleSoft Search Technology* documentation.

RTI Switch is coded for the following search definition and batch program combinations. If a batch job is not listed below, then it has not been coded to use RTI Switch due to lower volume/usage.

Search Definition	Batch Programs
EP_PO_REQUISITIONS	• PO_AUTO_SRC • PO_POCHNG • PO_POCREATE • PO_POROLL1 • PO_POROLLOPN • PO_POSTGPRG • PO_REQINVS • PO_REQLOAD • PO_REQRCON • PO_REQREOPN • PO_REQSORC • PV_AUTO_SRC

As of Update Image 54, EP_PO_REQUISITIONS have adopted data partitioning for high volume indexes. PeopleTools 8.61 is required. For more information on Index By Data Partition option, see *PeopleTools Search Technology*, Administering PeopleSoft Search Framework, Working with Search Indexes, *Partitioning Application Data in the Search Index Build Process Using Data Partition*.

Setting Up Installation Options

This topic discusses how to set up PeopleSoft eProcurement installation options.

To set up installation options for fluid and classic user interface pages, use the eProcurement Installation components: PV_INSTALLATION_PV and PV_CLASSIC_INS_SEC.

Pages Used to Set Up Installation Options

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Installation Options - Purchasing Page	INST_LINKS	Access the pages that are used to set overall system-installation options for PeopleSoft Purchasing, PeopleSoft Inventory, and other applications. Access is limited to users with the SYSTEM_ADMIN action role. For information on Installation Options - Purchasing page, see “Installation Options - Purchasing Page” (Application Fundamentals).
<u>Setting Up Installation Options for Fluid eProcurement</u>	PV_INSTALLATION_PV	Determine requisition options for fluid user interface pages. Access is limited to users with the SYSTEM_ADMIN action role.
<u>Setting Up Installation Options for Classic eProcurement</u>	PV_CLASSIC_INS_SEC	Determine requisition options for classic user interface pages. Access is limited to users with the SYSTEM_ADMIN action role.

Setting Up Installation Options for Fluid eProcurement

Use the eProcurement Installation Options page (PV_INSTALLATION_PV) to determine requisition options for fluid user interface pages.

Note: Unless specifically stated, the settings on the fluid installation page may affect classic. Since classic ePro is no longer under support, the option must be tested in fluid first to determine proper behavior.

Access is limited to users with the SYSTEM_ADMIN action role.

Navigation:

eProcurement > Administer Procurement > Maintain Overall System Options > eProcurement Installation Options

This example illustrates the fields and controls on the ePro Installation Options page (1 of 2). You can find definitions for fields and controls later on this page.

eProcurement Installation Options

[Classic Installation Options](#)

Item Catalog Options

*Item Source OptionMaster Items Only

☐ Catalog Management as eProcurement Item Source

Requisition Catalog Search

Catalog Search TypeSearch Engine

[Search Settings](#)[Customize Search Results](#)

Requisition

*Edit Requisition OptionsGo To Checkout First

*Save OptionsDisplay Both Buttons

*Line Overview Item PreferenceItem ID

Return Page After PunchoutCheckout Page

☒ Allow Editing of UOM
☒ Disable Chartfield Error

☒ Expand Distribution with Schedule
☒ Show Other Suppliers
☒ Show Item Images
☒ Allow Multi Image

☒ Suppress trailing zeros up to the currency decimal position for Price field
☒ Suppress trailing zeros for Quantity field

Filter Retention Options

Fluid Filter Default Days14

☐ Retain Common Filter Values

Default Days For ReceivingUse Receiver Settings

Filter Search Field OptionsUse Wildcard

This example illustrates the fields and controls on the ePro Installation Options page (2 of 2). You can find definitions for fields and controls later on this page.

Allow Saving Items in Favorites, Templates and Item History

☒ Direct Connect

Express Entry

☐ Disable Special Request☐ Restrict Prompt and Data Entry

Requisition Type

☐ Bill Only☐ Bill and Replace

Order Sheet

☒ Edit Chartfield Combinations

Casual Receiving Authorization

Receiving Options designate access to Receiving for other people. If 'Use Requisition Authorization' is selected, it is assumed that Authorization has been designated in User Preferences. Please refer to FSCM PeopleBooks for more information.

Receiving Options

Use Role Actions

Max Rows To Retrieve For

Warning: Increasing the search results quantity may negatively impact performance.

Search Results

50

Return to Maintain Overall System Options

Return to Administer Procurement

Save

Notify

Item Catalog Options

Field or Control	Description
Item Source Option	Select the source for items to be placed on the PeopleSoft eProcurement transactions. Items can come from the item master tables, the express catalog, or both.
Catalog Management as eProcurement Item Source	Select to indicate that items from PeopleSoft Catalog Management are to be used as the source.

Requisition Catalog Search

The fields within the Requisition Catalog Search group box are used to configure the item search and catalog browse abilities within the Create Requisition component.

Field or Control	Description
Catalog Search Type	Select the type of catalog and item search to use on the Catalog page in the Create Requisition component. Options are: • <i>Search Engine</i>: Select for quick and effective search. Note: This is the only option available for Fluid. The search option type is read-only. Note: Select this option once specific eProcurement search definitions and search categories have been deployed and indexing has been run for the search definitions. • <i>Structured Query Language</i>: Used for limited search and is not recommended to be used in production environments. Note: This option is only for the classic page.
Search Settings	Click this link to access the Search Settings Page, where you can narrow the search to a few fields or select all of them.
BU Catalog control (business unit catalog control)	To limit the access of item catalogs within certain business units, enter <i>Y</i>, and access the Assign Catalog to Business Unit page to set up the item catalogs to use in each business unit. Enter <i>N</i> to enable every business unit to access all catalogs. If you are using the rule-based item catalog security feature, use this field and the Assign Catalogs to Business Unit page in coordination with the Catalog Security page. This field is available only when rule based catalog security is activated for the business unit.
Customize Search Results	Use the Customize Search Results page to determine the fields to display in search results.

Requisition

<i>Field or Control</i>	<i>Description</i>
Edit Requisition Options	Select <i>Go To Cart First</i> or <i>Go To Checkout First</i>. Based on your selection, the Edit option on the My Requisitions page displays the Cart page or Checkout page when the requisition is in the Edit mode. The default selection is <i>Go To Cart First</i>. This option also controls which page the user is sent to when Copy Requisition is used in My Requisitions page.
Save Options	Select an option to indicate that the associated button appears on the Checkout page. Select from these options: • Display Both Buttons • Save Button Only • Submit Button Only.
Line Overview Item Preference	The available options are <i>Item ID</i> and <i>Supplier Item ID</i> .
Return Page After Punchout	Specify the landing page to display after items are added from an external punchout supplier site. • <i>Checkout Page</i>: Redirects the user to the Create Requisition – Checkout page after items are added to the cart from the external punchout site. • <i>Initial Page</i>: Redirects the user to the requisition landing page, as defined in Requisition Page Navigation, after items are added to the cart from the external punchout site. By default, the system redirects to the Checkout Page. Note: Punchout from the Checkout page returns the user to the same Checkout page after items are added from the external supplier site, regardless of the setup.
Allow Editing of UOM	Select to allow users to edit the unit of measure on Requisition pages using Fluid.
Disable Chartfield Error	Select to disable Chartfield error when you save the requisition.

Field or Control	Description
Enable Mobile Logging	Select to have the system log errors and warnings when creating and editing fluid requisitions.
Expand Distribution with Schedule	Select the check box to keep the distribution section on the Schedule detail page expanded as the default view.
Show Other Suppliers	Select to display other supplier information on the Item Details page. This option is also dependent on the role action VIEW_ALL_SUPPLIERS: • If this role action is enabled then other supplier information is available to show or hide on this page, based on this setting. • If this role action is not enabled then other suppliers are not displayed and this setting is not considered.
Show Item Images	Select to display the item image on the Requisition pages.
Allow Multi Image	Select to enable the multi image functionality. On selecting this check box user can set up many images to display when looking at a catalog item in Create Requisition. Multi images can be defined at purchasing and supplier level.
Suppress Trailing Zeros up to the currency decimal position for Price field	Select to suppress extra zeros till currency decimal position. Decimal Positions setup for the currency will be used to determine the number of decimal positions that will be displayed for price. This is no rounding off done for Price.
Suppress Trailing Zeros for Quantity Field	Select to suppress any extra zeros. This setting is applicable to line, schedule and distribution.

Filter Retention Options

The controls in this section apply to the fluid filter pages on My Requisitions, My Receipts, My Returns, and Review Change Requests, unless otherwise noted.

Field or Control	Description
Fluid Filter Default Days	Enter the number of days for the fluid filters to restrict or expand the number of items in the search results. The system subtracts this value from the current date to calculate the From Date, setting that date as the default. The default is 14 days.
Default Days For Receiving	Select any of the following options to set the default From Date for receiving. • <i>Use Filter Default Days:</i> If selected, the From Date for receiving is calculated and defaulted from Fluid Filter Default Days. • <i>Use Receiver Settings:</i> If selected, the From Date for receiving is defaulted from the requester page and you can configure it on the User Preferences—Procurement: Receiver Setup page. The default is Use Receiver Settings.
Retain Common Filter Values	If enabled, the system prevents the filters from automatically resetting to their default values. The system remembers your filter criteria even if you navigate to another page or enter from another tile or the ePro home page. For example, enter a PO number 0000000058 on the My Requisitions filters page and filter the requisitions based on the entered PO number. Once you navigate to the My Receipts page, the My Receipts filters page also retains the same PO number. The default value is disabled.

Field or Control	Description
Filter Search Field Options	Select any of the following options to configure the search field behavior. • <i>Use Exact Value:</i> If selected, you need to enter the exact values in the filters to get the result, and the system displays only the data that exactly matches (equals) the entered criteria. Special or wildcard characters are not allowed. • <i>Use Wildcard:</i> If selected, you are allowed to enter special characters in the filter that can substitute any other character in the search result to display the list without matching the entire contents. For example, let's say we are searching for a requisition ID 0000000018, but we are uncertain about the number of zeros present in the requisition ID. Then, in this case, use the special character "%" to exclude the zeros. The "contains" operator is used when building the search. The default is wildcard.

Allow Saving Items in Favorites, Templates and Item History

The field within this group box is used to determine the type of direct connect items that can be saved as a favorite item or on a template list.

Field or Control	Description
Direct Connect	Select this check box to allow Punchout and Roundtrip direct connect items to be saved as favorites or as items on a template. This method saves the requester time when creating additional requisitions for the same item. Deselect this check box to prevent Punchout and Roundtrip items from being added as favorites or template items. Each time the direct connect item is ordered, the requester must use the Web page of the Create Requisition component to access the supplier's online catalog, select the item, and then return to the eProcurement requisition.

Express Entry

<i>Field or Control</i>	<i>Description</i>
Disable Special Request	If the check box is selected, special request item lines will not be available on the Express Entry page. That is, you will be able to add only catalog items. The description field will be display only.
Restrict Prompt and Data Entry	If the check box is not selected, the prompts on the Supplier Information and Manufacturer Information tabs will be open. If the check box is selected, then: • The Supplier ID prompt will display only those suppliers, who have been defined for the item. • The Supplier Item ID, Supplier's Catalog, and UPN ID fields will be display only and will be updated when the Supplier or Manufacturing ID is changed. • If the Item and supplier fields are non-blank and the Item/Supplier manufacturers exist, then the Manufacturer ID displays those values. Else, it displays the Item level Manufacturers. If neither of the Item/Supplier or Item level manufacturers exists, the prompt will be blank. If the Supplier field is blank, then it displays the Item level prompt. • When the Supplier field is blanked out, the system updates the Supplier Item ID, Supplier's Catalog and details on the Manufacturer Information tab, if the manufacturing information was set up at the Item/Supplier level. If the manufacturing information was set up at the Item level, then that would not change. Note: If the Express Entry Options are unchecked, the fluid Express Entry pages will act very similar to the classic Express Item pages with regard to the prompt values.

Requisition Type

<i>Field or Control</i>	<i>Description</i>
Bill Only and Bill and Replace	• Bill Only requisition means items were used but no replacements are needed. • Bill and Replace requisition means that the part which was used needs to be billed, but a replacement part is also required. Select any or both the check boxes to configure Requisition Type for the requisition pages. Users can create and manage requisitions for the selected requisition type. If none of the check boxes are selected, users can create and manage Standard requisitions only.

Order Sheet

<i>Field or Control</i>	<i>Description</i>
Edit ChartField Combinations	Select the Edit ChartField Combinations check box to check the valid ChartField combinations on the distribution lines for an order sheet. If this check box is selected, an error message displays when you save an order sheet with invalid ChartField combinations.

Casual Receiving Authorization

The field within this group box is used to determine the requisition authorization to create Receipt.

Field or Control	Description
Receiving Options	This section allows the requester to receive the requisitions on behalf of another requester. The default action is Use Role Actions. Select a Receiving Option: <i>Use Role Actions:</i> If selected, the requester can Receive a requisition for others based on certain role actions. If RECV_BY_SHIPTO is enabled against a role, the requester can receive all the transactions for a particular Ship To ID that is set up in the user preferences for the user, irrespective of being a requester of record for the transaction. If RECV_ALL_SHIPTO is enabled against a role, then the requester with that role will be able to receive for all Ship Tos in the system. Note: If both role actions are enabled, then RECV_ALL_SHIPTO will be the one that is used to determine what pending receipt lines the requester can receive against. <i>Use Requisition Authorization:</i> If selected, the requester can receive the requisition based on authorization configuration defined on the Requisition Authorization page. The Requisition Authorization page grants a user the authority to perform specific actions for additional requesters. The user can receive on behalf of any requesters (if the check box <i>Full Auth for All Requesters</i> is enabled) or other requesters when Add authority is given. For more details, see “User Preferences – Requisition Authorizations Page” (Application Fundamentals).

Max Rows To Retrieve For

The field within this group box is used to determine the maximum number of items that can be displayed.

Field or Control	Description
Search Results	Enter the maximum number of values that the system retrieves on page searches. This field only applies to the following pages: <i>Search Catalog</i> <i>Advanced Search</i> <i>Item History</i> <i>Manage Requisitions</i> <i>Manage Purchase Orders</i> <i>Receipts for a Power User</i> <i>Receipts for a Casual User</i> <i>My Requisition</i> Note: If a search returns more rows than you specify, a message appears.

Related Links

“Understanding Financials and Supply Chain Search” (Application Fundamentals)

Search Settings Page

Use the Search Settings page (PV_SRCH_SET_TBL) to determine search settings.

Navigation:

eProcurement > Administer Procurement > Maintain Overall System Options > eProcurement Installation Options > Search Settings link

This example illustrates the fields and controls on the Search Settings Page (1 of 3). You can find definitions for fields and controls later on this page.

Search Settings

×

Help

Search Settings

Basic Search Options

☒ Search All Fields

☐ Narrow Search to these Fields

- ☐ Item Description
- ☐ Category Description
- ☐ Category ID
- ☐ Item ID
- ☐ Manufacturer
- ☐ Manufacturer's Item ID
- ☐ Supplier
- ☐ Supplier Item ID
- ☐ UPN ID

Optional Search Fields

Purchasing Attributes to display on the Advanced Search Page:

☒ Price Range☒ Model

This example illustrates the fields and controls on the Search Settings Page (2 of 3). You can find definitions for fields and controls later on this page.

Search Settings

Sort Option Configuration

☒ Description

☒ Price - low to high

☒ Price - high to low

☐ Relevance

Initial Sort

Description

Indexing Options

Common Currency Code

USD

☒ Current Active Items Only

☐ Update Tree Changes

Search Options

Warning. Do not change these settings unless instructed by the development team.

☐ Display Search Filters

Search Category Name

☐ Display Search Score

This example illustrates the fields and controls on the Search Settings Page (3 of 3). You can find definitions for fields and controls later on this page.

Special Request Search Options

☒ Item Description

☐ Category ID

☐ Supplier ID

☐ Supplier Item ID

☐ Manufacturer ID

☐ Manufacturer's Item ID

OK

Cancel

Field or Control	Description
Basic Search Options	Select the attributes in the Basic Search Options to appear on the Advanced Search page.
Optional Search Fields	Select from the given two Purchasing Attributes to be displayed on the Advanced Search page. Attributes are Price Range and Model. These are optional search fields, which you can select to appear on the Advanced Search page.
Sort Option Configuration	Select the check boxes to configure the sort options for eProcurement. The selected sort options are displayed in the <i>Sort By</i> drop-down of Create Requisition Search Results page. Depending on the Initial Sort Option, the Create Requisition search results will be sorted. Once the search result is displayed, you can sort the result as per desired sort option. Note: Relevance sort option is visible only when the PeopleTools version is 8.59.18, 8.60.06, 8.61, or above. To make Relevance Sort Option available, APPLY_WEIGHTED_SORT Role Action should be enabled for the requester and an active Weighted Sort Rule. To know more about Role Actions, see Maintaining System Users and Roles. To configure Weighted Sort Rules, see Manage Weighted Sort Rules Page.
Indexing Options	• <i>Common Currency Code:</i> Select a common currency code to be used when indexing item prices to facilitate sorting and comparison with indexed prices. If the default value of USD is changed after indexing then a full index is required as all item pricing that is stored in the search framework repository would be in this default currency code. • <i>Current Active Items Only</i> • <i>Update Tree Changes:</i> Select this check box for running the Tree update during incremental run.
Search Options	Select required search framework options. Select Display Search Score check box to display the search score on the requisition catalog search result. This option is intended for developers only.
Special Request Search Options	Select the attributes in the Special Request Search Options to appear on the Advanced Search page.

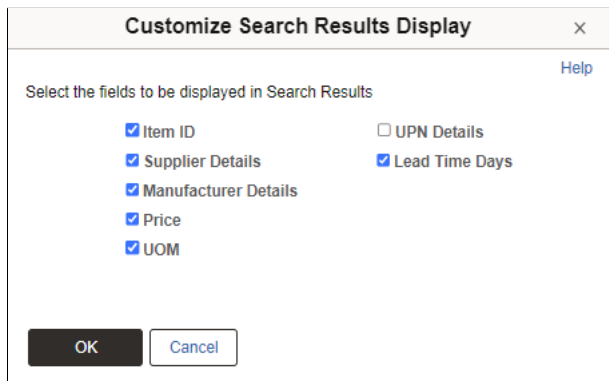
Customize Search Results Display Page

Use the Customize Search Results Display page (PV_SRCH_DISP_SEC) to determine the fields to display in search results.

Navigation:

eProcurement > Administer Procurement > Maintain Overall System Options > eProcurement Installation Options > Customize Search Results link

This example illustrates the fields and controls on the Customize Search Results Display page.



The screenshot shows a dialog box titled "Customize Search Results Display" with a close button (X) in the top right corner. Inside the dialog, there is a "Help" link in the top right. The main text reads "Select the fields to be displayed in Search Results". Below this, there are two columns of checkboxes. The left column contains: ☒ Item ID, ☒ Supplier Details, ☒ Manufacturer Details, ☒ Price, and ☒ UOM. The right column contains: ☐ UPN Details and ☒ Lead Time Days. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

Setting Up Installation Options for Classic eProcurement

Use the Classic Installation Options page (PV_CLASSIC_INS_SEC) to determine requisition options for classic user interface pages.

Navigation:

eProcurement > Administer Procurement > Maintain Overall System Options > eProcurement Installation Options

Select **Classic Installation Options** link.

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

Classic Installation Options

Help

Classic Installation Options

*sProcurement

*sProcurement Installation Option

eProcurement with sProcurement

Requisition Catalog Search

*Catalog Search Type

Structured Query Language

BU Catalog Control

N

Customize Search Results

You have selected to use the Structured Query Language to do the item catalog search for a requisition. Structured Query Language will be supported only in Classic requisition and not in Fluid Requisition.

☐ Non Dynamic Range

☐ Override Existing Categories with Item Ranges

☐ Allow Transparent Punchout Items

☐ Consolidate Marketplace Items in Search Results and Facets

Requisition

☐ Display Approval Chunking

Allow Saving Items in Favorites, Templates and Recently Ordered From

☐ Transparent Punchout

Max Rows To Retrieve For

Requisition

20

Approval Monitor

5

Transparent Punchout

25

OK

Cancel

sProcurement

Field or Control	Description
sProcurement Installation Option	Select the type of PeopleSoft Services Procurement options that you want to use. You can integrate PeopleSoft eProcurement with PeopleSoft Services Procurement, use PeopleSoft Services Procurement as a standalone application, or select not to use the PeopleSoft Services Procurement application.

Requisition Catalog Search

The fields within the Requisition Catalog Search group box are used to configure the item search and catalog browse abilities within the Create Requisition component.

Field or Control	Description
Catalog Search Type	Select the type of catalog and item search to use on the Catalog page in the Create Requisition component. Options are: • <i>Search Engine</i>: Select for quick and effective search. Note: Select this option once specific eProcurement search definitions and search categories have been deployed and indexing has been run for the search definitions. • <i>Structured Query Language</i>: Used for limited search and is not recommended to be used in production environments.
BU Catalog control (business unit catalog control) business unit catalog control catalog control, business unit	To limit the access of item catalogs within certain business units, enter <i>Y</i>, and access the Assign Catalog to Business Unit page to set up the item catalogs to use in each business unit. Enter <i>N</i> to enable every business unit to access all catalogs. If you are using the rule-based item catalog security feature, use this field and the Assign Catalogs to Business Unit page in coordination with the Catalog Security page. This field is available only when rule based catalog security is activated for the business unit.
Non Dynamic Range	Select this check box to use non-dynamic range categories for the item search and catalog browse feature within the Create Requisition component. If an item category is marked as a non-dynamic range in PeopleTool Tree Manager then the item search returns only those items that belong to the catalogs that the user has access to and are within the item ranges specified in the item categories and sub-categories of the accessible catalogs. In addition, selecting this check box enables the item load processes for CUP file sources and Catalog Management sources to load non-dynamic item ranges defined for a category. Deselect this check box to treat all item categories as dynamic ranges within the item search and catalog browse feature of the Create Requisition component. Search results include all items belonging to the specified category and is not limited to any item ranges defined for the category. In addition, deselecting this check box prevents the item load processes for CUP file sources and Catalog Management sources from loading non-dynamic item ranges.

Field or Control	Description
Override Existing Categories with Item Ranges	Select this check box to enable the item load processes for CUP file sources and Catalog Management sources to change categories from dynamic to non-dynamic when loading items into an existing category. In other words, if items loaded belong to existing categories, these categories will all have non-dynamic item ranges loaded regardless of its original type; a category that was originally a dynamic category, is now changed to non-dynamic with item ranges. Any new categories are created as non-dynamic ranges. Deselect this check box to enable the item load processes for CUP file sources and Catalog Management sources to retain the category type (dynamic or non-dynamic) when loading items into an existing category. In other words, if the existing categories have item ranges, then new item ranges are loaded; however, if the existing categories are dynamic, then no new item ranges are loaded. Any new categories are created as non-dynamic ranges.
Allow Transparent Punchout Items	Select to enable the Transparent Punchout feature and display the Transparent Punchout Node field on the Linked Supplier page. Note: Only if this field is selected, the Transparent Punchout field in Allow Saving Items in Favorites and Templates From and Max Rows To Retrieve For section is enabled for editing.
Consolidate Marketplace Items in Search Results and Facets	Select to display internal and external marketplace items in a single search result tab. Also facets will combine both external and internal items while filtering. Note: This check box is available only when the field Catalog Search Type is set to Search Engine option and Allow Transparent Punchout Items check box is selected.
Customize Search Results	Use the Customize Search Results page to determine the fields to display in search results.

Requisition

<i>Field or Control</i>	<i>Description</i>
Display Approval Chunking	Select to enable chunking in the Review/Edit Approvers section of the workflow approval components (Requisition Approval page) and on the Confirmation page of the Create Requisition component. This only impacts the line level approvals.

Allow Saving Items in Favorites, Templates and Recently Ordered From

The field within this group box is used to determine the type of direct connect items that can be saved as a favorite item or on a template list.

<i>Field or Control</i>	<i>Description</i>
Transparent Punchout	Click this check box to allow Transparent Punchout items to be added as a favorite or included in a template. For more information on Transparent Punchout see Understanding Transparent Punchout Note: This check box is enabled for editing only if Allow Transparent Punchout Items check box is selected.

Max Rows To Retrieve For

The fields within this group box are used to determine the maximum number of items that can be displayed.

<i>Field or Control</i>	<i>Description</i>
Requisition	Enter a value that determines the number of requisition lines to be displayed in chunks on the Edit Requisition - Review and Submit page. The system automatically defaults to value 9999. You can override this value. However, this value does not impact the number of requisitions retrieved while searching for requisitions.

Field or Control	Description
Approval Monitor	Enter a value to control the display of requisition lines for approval on the Requisition Confirmation page and Requisition Approval page. Chunking displays the requisition lines in groups to make large requisitions more manageable. The size of the group is determined by the value entered for this field. If Display Approval Chunking check box is selected and Approval Monitor value is set to for example 5, then the requisition with line level approval will trigger approval chunking on eProcurement Confirmation and Manage Requisition Approval pages when the requisition lines for approval exceed five.
Transparent Punchout	Enter the maximum number of items per transparent punchout suppliers to be displayed at one time on the search results section of the requisition. Note: This field is enabled for editing only if Allow Transparent Punchout Items check box is selected.

Once Search Engine searching is enabled and has been selected, you can perform Search Engine search from the catalog browse page and the main search page. In the Catalog browse page when you browse a selected catalog or category, the search results are displayed along with facets and breadcrumbs for each search. You can select facet values and perform further search on the catalog.

For information on how item search works in eProcurement classic user interface, see [Creating Requisitions](#).

See the product documentation for *PeopleTools: Search Technology*

Related Links

“Understanding Financials and Supply Chain Search” (Application Fundamentals)

Setting Up eProcurement Requisition Navigation: Classic Page

This section provides an overview of setting up eProcurement requisition left navigation order and labels, which can be configured for the Classic User Interface.

Page Used to Set Up eProcurement Requisition Navigation for Classic Page

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>eProcurement Requisition Navigation: Classic Page</u>	PV_LEFTNAV	Set up eProcurement requisition left navigation order and labels for the Classic User Interface.
<u>eProcurement Navigation Setup: Assign Roles Page</u>	PV_LEFTNAV_XTRA	Assign Role Names to a specific Navigation ID.

eProcurement Requisition Navigation: Classic Page

Use the eProcurement Requisition Navigation: page (PV_LEFTNAV) to set up eProcurement requisition left navigation order and labels for the Classic User Interface.

This setting will be the default, system level setting for the left navigation.

Navigation:

eProcurement > Administer Procurement > Maintain Overall System Options > eProcurement Requisition Navigation

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

eProcurement Requisition Navigation

Requisition Left Navigation ⓘ

<

>

1-18 of 18

>

>

Default Navigation Label	Level	Visible	Initial Page	Display Order	Message Set Number	Message Number	Override Navigation Label
All Request Options	1	☒	☐	5	18036	1521	All Request Options
Catalog	1	☒	☒	10	18036	1500	Catalog
Web	1	☒	☐	20	18036	1504	Web
Express Item Entry	1	☒	☐	30	18036	1501	Express Item Entry
Special Request	1	☒	☐	40	18036	1502	Special Requests
Service Request	1	☒	☐	50	18036	1507	Services Procurement
Resource	2	☒	☐		18036	1522	Resource
Deliverable	2	☒	☐		18036	1523	Deliverable
Multi Resource	2	☒	☐		18036	1524	Multi Resource
Forms	1	☒	☐	60	18036	1505	Forms
Favorites	1	☒	☐	70	18036	1503	Favorites
Templates	1	☒	☐	80	18036	1519	Templates
ePro Services	1	☒	☐	90	18036	1506	ePro Services
Fixed Cost Service	2	☒	☐		18036	1513	Fixed Cost Service
Variable Cost Service	2	☒	☐		18036	1514	Variable Cost Service

[Return to Maintain Overall System Options](#)
[Role Navigation Templates](#)

Select the number of sub-categories to be displayed in the left navigation.

Sub-Categories Displayed

Field or Control	Description
Default Navigation Label	Displays all the labels for the left navigation that has been defined through message catalog. The items appear in the following order: • All Request Options • Catalog • Web • Express Item Entry • Special Requests • Services Procurement • Resource • Deliverable • Multi Resource • Forms • Favorites • Templates • eProcurement Services • Fixed Cost • Variable Cost • Time and Materials • Recently Ordered • External Catalogs
Level	Displays the level for the label. Level 1 labels will be at the top followed by level 2 labels.
Visible	Select to show level 1 labels. Level 2 labels cannot be hidden, hence the check box cannot be edited.
Initial Page	Select to set a page as initial page to be displayed when accessing the create requisition component for the first time. Initial page can also be set at the role action level. Note: Only level 1 page can be selected as initial page also you can select only one level 1 page as initial page.

Field or Control	Description
Display Order	Enter the order in which you want the level 1 labels to be displayed. Level 2 labels cannot be re-ordered.
Message Set Number, Message Number	Enter appropriate number to modify the left navigation label. The message number is associated with the message text in the message catalog. Hence if you enter invalid label which does not correspond with the message text associated with the message number then the user will get an error message.
Override Navigation Label	Enter required label name. The label name you enter here will override the navigation label.
Sub-categories Displayed	Enter the number of sub-categories to be displayed in the left navigation. Default value is 5.

eProcurement Navigation Setup: Assign Roles Page

Use the eProcurement Navigation Setup: Assign Roles page (PV_LEFTNAV_XTRA) to assign Role Names to a specific Navigation ID. In addition to the default navigation defined, you can change the Navigation options and the initial page for a subset of requesters by role. This section is applicable for the Classic User Interface.

Navigation:

eProcurement > Administer Procurement > Maintain Overall System Options > eProcurement Requisition Navigation. Click the Role Navigation Templates link.

This example illustrates the fields and controls on the eProcurement Navigation Setup: Assign Roles page. You can find definitions for fields and controls later on this page.

eProcurement Navigation Setup [Close]

[Help](#)

Assign Roles

Navigation List [Search] | [First] [Previous] [1 of 1] [Next] [Last] | [View All](#)

*Navigation ID [Text Box] *Priority [Text Box] [+] [-]

▼ **Roles**

[Search] [First] [Previous] [1-1 of 1] [Next] [Last] | [View All](#)

*Role Name [Text Box] [Search] [+] [-]

OK **Cancel** **Apply**

Role Navigation Templates

Settings on this page takes precedence over the system level settings.

Field or Control	Description
Navigation ID	Enter required navigation ID. You can define multiple navigation IDs.
Priority	Enter priority for the navigation ID. The priority decides what navigation IDs will be used for a role if there are multiple navigation IDs associated with it.
Role Name	Select required role name to be assigned. Each navigation ID can be associated with multiple role names.

When you assign a navigation ID and a priority, the Requisition Navigation options from the defaults are copied to this page. You can change the visibility and the initial page for the entire group of people identified by the Role Name(s) identified in the Roles grid.

Setting Up Attachments for Transactions

To set up attachments for transactions, use the File Attachments Administration component (PV_ATTACH_ADMIN).

This section provides an overview of transaction attachments and discusses how to identify servers, component names, and paths for stored attachments, define supplier email addresses for sending attachments, and set up locations for storing attachments.

Pages Used to Set Up Attachments for Transactions

Page Name	Definition Name	Usage
Administer File Attachments Page	SAC_ATT_ADMIN	Identify servers on which to store attachments. See “Administer File Attachments Page” (Application Fundamentals)
<u>Supplier Address Page</u>	VNDR_ADDRESS	Define supplier email addresses for sending attachments.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
URL Maintenance Page	URL_TABLE	Requires end users to manually enter the file location for attachments (not the recommended method). See “URL Maintenance Page” (Approval Framework)

Understanding Transaction Attachments

A transaction attachment is a file that you can attach to a transaction, such as a PeopleSoft eProcurement requisition. The file can be a Microsoft Word file, a Microsoft Excel spreadsheet, a Microsoft PowerPoint presentation, a Microsoft Visio diagram, or any other type of document. Requesters and buyers can view these attachments. The system adds the attachment automatically to the purchase order that is created from the requisition. You can then send these attachments to a supplier.

Note: Other PeopleSoft applications use transaction attachments. This section uses PeopleSoft eProcurement transaction examples, but these examples can apply to any PeopleSoft transaction.

PeopleSoft applications enable you to store attachments to and retrieve attachments from a server. After you set up attachments for the system:

- Requesters can add attachments to their requisitions using header, line, or ship to comments from the Review and Submit page.
- Requesters can add attachments to the receipt header and receipt line using the comment pages from the Receive page.
- Requesters or buyers can view attachments to requisitions using the Requisition Details page and the Requisition Schedule and Distribution page within the Manage Requisitions component.
- Buyers can view attachments to requisitions using the Expedite Requisitions page.
- Buyers can view attachments to purchase orders using the Manage Purchase Orders page.
- Buyers can notify the supplier of an attachment to be sent with the purchase order by running the Notify Suppliers of Attachment process (PV_EMAIL_AE).

This process sends the supplier an email with the purchase order, line number, and attachment.

To add attachments to transactions, you can:

- Use the attachment utility that is provided by PeopleSoft PeopleTools.

This utility enables the system administrators to control where attachments are stored. Administrators can configure more than one server and change the server settings when needed. This utility standardizes the use of attachments. Users do not need to remember or enter the network path for attachments. This is the recommended method.

- Set up a server location for storing attachments.

Users manually place their attachments on a file share on the network and add the path to the attachment file into the transaction that they want it associated with. This method uses the “URL Maintenance Page” (Approval Framework) to set up a location for storing attachments. This is usually an FTP server. In the root directory, add a subfolder named PV and then give read and write privileges to anonymous users, or any users who are specified in the FTP string. For PeopleSoft eProcurement attachments, create a URL identifier that is named PV for the FTP location and then specify the FTP server address. The FTP root location must contain a subdirectory that is named PV.

Using the Attachments Utility for Other PeopleSoft Applications

This attachments utility enables you to set up and administer file attachment servers in one component. You no longer need to add code to hold explicit references to URLs or identify the type of database. All of this is accomplished using the Administer Attachment Servers component. You can change the active server, without changing code.

Records that you need to store attachments to and retrieve attachments from a PeopleSoft eProcurement requisition have already been defined by PeopleSoft. However, you can design attachments to be used in PeopleSoft Purchasing, PeopleSoft Services Procurement, and PeopleSoft Strategic Sourcing.

Use the completed attachment feature in PeopleSoft eProcurement as an example. Using the PeopleSoft eProcurement example, the basic expectation is that the application has a record in which it stores attached file references. This record is a child of the parent records for the application and appears in a scroll.

To store references to attached files, every application must define a record that is associated with an underlying table. For example, the PeopleSoft eProcurement requisition component has the record PV_REQ_ATTCH in which it stores references to all attached files. Following the usual pattern, this record uses the key fields of its parent records and adds a unique key of its own. This utility expects the applications to have such a record (the attachment reference record for the application).

The attachment reference records must include these two fields: **SCM_ATTACH_ID** and **ATT_VERSION**. These two fields are the key fields of the PV_ATTACHMENTS record, which is the central repository of all attachment information.

The **PV_ATTACH_NUM** field is no longer necessary, although it does not need to be deleted. Include any other field from PV_ATTACHMENTS in the attachment reference record for the application.

When you are designing the user interface, only the user file and description fields should be made visible to the users. For PeopleSoft eProcurement, the work record PV_ATTACH_WRK includes these two fields. Also, if you use the application development framework class, Application Interface, then this work record and the class resolve all persistence issues.

In general, you should enable users to attach more than one file. Use the Line Comments page (PV_REQ_COMMENTS) in PeopleSoft eProcurement as an example of the proper scrolls, buttons, and grids to use. The Line Comments page enables you to add and view attachments using buttons.

The **View** button is inside the scroll and associated with SCM_ATTACH_WRK.SCM_DOWNLOAD. For the **Add** button, copy the PeopleSoft eProcurement **ATTACHADD** field in the work record PV_REQ_WRK, and then change the one piece of the code that refers to PeopleSoft eProcurement:

```
Local Rowset &rs = GetLevel0 () (1). GetRowset (Scroll.REQ_LINE) (&Level1Row).
GetRowset (Scroll.PV_REQ_ATTACH);
```

If you decide that you want to include the **Add** button inside the grid, the SCM_ATTACH_WRK record provides the **SCM_UPLOAD** field, which can be bound to an **Add** button within a grid. In this case, you do not need to add any code. Verify that the attachment reference record for the application is included in the same grid. As long as the system can find an attachment reference record for the application, which includes the fields **PV_ATTACH_ID** and **ATT_VERSION**, the utility manages every event, including row insertion, attachment upload, download, and save.

When attachment files are to be stored in a server, PeopleSoft PeopleTools requires the database to have a record structured in a specific way. These delivered records meet these requirements: FILE_ATTDET_SBR for database servers and FILE_ATTACH_SBR for File Transfer Protocol (FTP) servers.

Supplier Address Page

Use the Supplier Address page (VNDR_ADDRESS) to define supplier email addresses for sending attachments.

Navigation:

eProcurement > Administer Procurement > Maintain Suppliers > Supplier Information > Address

This example illustrates the fields and controls on the Supplier Address page.

The screenshot shows the 'Supplier Address' page in PeopleSoft. The page has tabs for 'Summary', 'Identifying Information', 'Address', 'Contacts', 'Location', and 'Custom'. The 'Address' tab is selected. The page displays the following information:

- SetID:** SHARE
- Supplier ID:** 0000000044
- Short Supplier Name:** MELS-001
- Supplier:** Mel's Diner

The main section is titled 'Supplier Address' and includes a grid with one row. The grid has columns for Address ID (1), Description (Diner), Effective Date (01/01/2003), and Effective Status (Active). Below the grid, there are fields for Country (USA), Address 1 (396 Thunderbird Dr.), Address 2, Address 3, City (Phoenix), County, Postal (85375), State (AZ), and Email ID. At the bottom, there is a section for 'Payment/Withholding Alt Names' and a 'Phone Information' table with columns for Type, Location, Prefix, Telephone, and Extension.

To send an attachment to the supplier, for the *001* address ID, enter the supplier's email ID address in the **Email ID** field. When you run the Notify Suppliers of Attachments (PV_EMAIL_AE) process, attachments are sent to the supplier email address, along with the purchase order ID and line number. The attachment is sent only after the purchase order is dispatched and published. Header level attachments will not be sent by this process.

Related Links

“Maintaining Supplier Name History” (PeopleSoft Source to Settle Common Information)

Setting Up Event Notifications and Escalations

This section provides an overview of notifications and discusses how to define notification event types, set up notification events, and review notification event statuses.

Pages Used to Set Up Event Notifications and Escalations

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Event Type Page	PTAF_NEM_EVENTS	Use this page to create a notification event, specify the conditions for which it should check, and specify the actions that the system should take when the notification conditions are met.
Setup Event Page	PTAF_NEM_SETUP	Set up events.
Status Page	PTAF_NEM_STATUS	Use this page to determine whether the system successfully ran the notification event and to delete event logs.

Understanding Notifications

Notifications enable you to create and send a notification to someone. The notifications can be either a worklist item or an email message. Notifications are associated with an overall process, such as a workflow.

Use the Event Notification and Escalation feature to create a process that you can schedule to run at any time, independent of other applications. This feature is an Application Engine program that is called from the PeopleSoft Process Scheduler. You define rules for sending notifications, such as when a workflow approval has gone beyond the time defined for responses. You configure the requesters and approvers who receive the notification using the approval pages of the PeopleSoft application.

The system notifies a specific user using email or invokes an action that is defined in the subscriber system. This system makes the call to an application program interface (API) that is registered by PeopleSoft eProcurement and uses the Event Notification and Escalation feature to:

- Define a notification based on a process and its event type.

The notification definitions are grouped based on the event type for each process.

- Evaluate whether the condition has been met.

The system uses polling notifications that it implements through the PeopleSoft Process Scheduler. For each active, configured, and defined notification event, the system takes an action based on the outcome of the evaluation. The system makes an evaluation by:

- Running a SQL view.
- Running a query object.
- Calling a user-defined PeopleCode application class from within an application package.
- Trigger the action that is defined for the user event.

The action that is taken will be either an email notification that was set up using the PeopleSoft notification template or a user-defined PeopleCode application class. If the action invokes PeopleCode, then the rowset that is returned from the evaluation step is passed into the action step.

- Log errors and exceptions and report notification statuses.

Event Type Page

Use the Event Type page (PTAF_NEM_EVENTS) to use this page to create a notification event, specify the conditions for which it should check, and specify the actions that the system should take when the notification conditions are met.

Navigation:

eProcurement > Administer Procurement > Maintain Workflow > Event Types

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

Event Type:	APPROVAL ACTIVITY EMAIL
Server Name:	PSNT 
Event Types Description:	Offline email processing for notification events triggered by the event handler

<i>Field or Control</i>	<i>Description</i>
Event Type	Enter an identifier for the event type. The system uses this value as a prompt value when you set up notification events for applications such as PeopleSoft eProcurement.

Field or Control	Description
Server Name	Select a server on which the notification event should run. You can use an existing PeopleSoft Process Scheduler server or an existing application server. By defining an event to run on a specific sever, you can manage the server's workload. You can also set up an event type to run the same notification event on different servers.

Setup Event Page

Use the Setup Event page (PTAF_NEM_SETUP) to set up events.

Navigation:

eProcurement > Administer Procurement > Maintain Workflow > Event Definitions

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

Event ID:	APPROVALACTIVITYEMAIL		
*Event Type:	APPROVAL ACTIVITY EMAIL 	☒ Active	
Event Types Description:	Offline email processing for notification events triggered by the event handler	Recurrence:	15 Min
		Repeat Time:	
*Evaluation Type:	SQL View 	Name:	SAC_NTF_PRNT 
*Action Type:	Email 		
Email Address:			
Template Name:			

Field or Control	Description
Event ID	Displays the unique name that the system uses to identify the current notification event. You enter this value if you are adding an ID.
Event Type	Select the event type. Event types determine which server is going to process the event.
Active	Select to indicate that the current notification is active. If the notification is not active, the system does not run the evaluation condition.
Event Types Description	Displays the user-defined description for this event type.

Field or Control	Description
Recurrence	Displays the interval or frequency that the system uses to poll a notification condition. When a condition is met, the system triggers the action that is defined for the notification. The system polls for active notifications to be triggered based on the query object, SQL view, or PeopleCode application class that is defined in the notification condition. The polling interval is part of scheduling and works with the repeat interval that is defined for a specific event type.
Repeat Time	Enter a value for the amount of time that lapses between an evaluation time to the next time that the system polls or evaluates the notification condition. For each configured notification, you can enter a repeat interval. This interval must be a multiple of the scheduled polling frequency.
Evaluation Type	Select how you want the system to evaluate the condition for a notification event. Values are: <i>PeopleCode</i>: With this evaluation type, you write code to return the row set that you want. If PeopleCode is chosen as the action step, then the evaluation rowset is passed into the action step for custom processing. <i>Query Obj</i> (query object): This is a predefined query that you set up using the Query Manager that returns a rowset. <i>SQL View</i>: You create SQL views using PeopleSoft Application Designer.
Name	Displays the name of the query object or SQL view, depending on which is selected as the evaluation type.
Action Type	Select the type of action that you want the system to take when a notification condition has been met. Values are: <i>PeopleCode</i>: Select an application package and class to perform a custom notification or action. Note: If you select <i>PeopleCode</i>, the Package and Class fields appear. <i>Email</i>: Select to use an email for the notification. When you select this action type, the Email Address and Template Name fields appear.
Package	Select the application package that contains the application class for performing a custom PeopleCode evaluation.
Class	Select an application class that is associated with the application package.

Field or Control	Description
Email Address	Enter an email address for the user that you want to receive this notification. To add multiple email addresses, use commas as delimiters. This field is available only when you select <i>Email</i> in the Action Type field.
Template Name	Select an email template that you want to use with this notification event. The template contains instructional text, message, sender, and message priority. You define email templates for use with notification by using the Generic Template Definition page. To access the page, select Set Up Financials/Supply Chain > Approvals > Generic Templates > Generic Template Definition.

Status Page

Use the Status page (PTAF_NEM_STATUS) to use this page to determine whether the system successfully ran the notification event and to delete event logs.

Navigation:

eProcurement > Administer Procurement > Maintain Workflow > Event Status

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

The screenshot shows the Event Status page. At the top, there are two labels: "Event ID" with the value "ESCALATIONS" and "Event Type" with the value "ESCALATION_EVENT". To the right of these labels is a "Log Delete Options" section containing two buttons: "This Event" and "All Events". Below these elements is a "Notification Manager" section. It includes a "View All" link with a magnifying glass icon, a calendar icon, and pagination controls showing "First", "1 of 1", and "Last". Below the pagination is a table with three columns: "DateTime Stamp", "Matches", and "Detail". The table contains one row with the value "1" in the "DateTime Stamp" column and "0" in the "Matches" column.

Field or Control	Description
This Event	Click to delete all notification event logs for the event ID that you selected.
All Events	Click to delete all notification event logs for all events.
Date Time Stamp	Used in the Status record to track the results of each instance run.
Matches	Displays the number of rows that are returned from a row set.

Field or Control	Description
Detail	Displays detailed status messages for each notification event.

Maintaining System Users and Roles

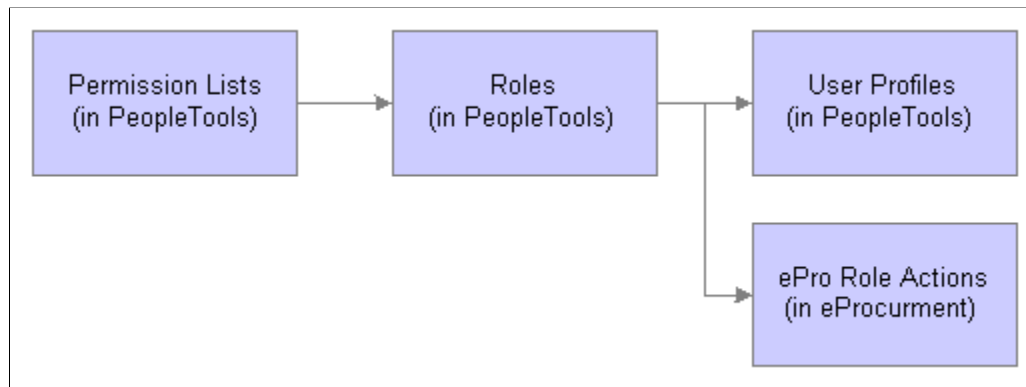
User security in PeopleSoft eProcurement is similar to that in other PeopleSoft applications. You can associate permission lists with roles to which user profiles (user IDs) are attached. However, PeopleSoft eProcurement comes with several predefined role actions that restrict or grant user access to certain actions.

The following elements are used to create user access:

- *Permission Lists:* (PeopleTools) Permission lists are the building blocks of user security authorization. A permission list grants a degree of access to a particular combination of PeopleSoft elements, specifying pages, development environments, time periods, administrative tools, personalizations, and so on. This level of access should be appropriate to a narrowly defined and limited set of tasks, which can apply to a variety of users with a variety of different roles. These users might have overlapping, but not identical, access requirements.
- *Roles:* (PeopleTools) A role is a collection of permission lists. You can assign one or more permission lists to a role. The resulting combination of permissions can apply to all users who share those access requirements. However, the same group of users might also have other access requirements that they do not share with each other. You can assign a given permission list to multiple roles.
- *User Profiles:* (PeopleTools) A user profile is a definition that represents one PeopleSoft user. Each user is unique; the user profile specifies a number of user attributes, including one or more assigned roles. Each role that is assigned to a given user profile adds its permission lists to the total that apply to that user.
- *eProcurement Role Actions:* (eProcurement) eProcurement role actions are predefined role actions that restrict or grant user access to certain actions.

The following flow chart illustrates the setup of eProcurement security from permission lists, roles, and user profiles to the eProcurement role actions:

This example illustrates the fields and controls on the User security setup within PeopleTools and PeopleSoft eProcurement.



Users are granted access to certain actions and pages based on their roles. For example, assume setting up the user ID VP1 to be an administrator of the eProcurement system. The system has a predefined user role named ePro Admin, and this role contains permission lists to allow access to suppliers, items, business units, and Purchasing and eProcurement pages. Using the User Profile-Roles page, attach this user role to the user ID VP1. Next, within eProcurement, VP1 needs to have access to the System Administration region of the Administer Procurement Main page; therefore, attach the user role ePro Admin to the eProcurement Role Actions page for the SYSTEM_ADMIN action name.

For more information about PeopleTools user security, see *PeopleTools: Security Administration*.

Understanding Role Names, Role Actions, and Role Action Categories

Role actions are pre-grouped into role action categories. Role action categories are pre-associated with transactions, which can be viewed on the Administer Role Action Categories page.

The relationship between role actions, role action categories, and transactions can be viewed on the eProcurement Role Actions page.

The administrator selects a transaction to work with for a particular role. Administrators will have to select the Role Action Categories and Role Actions they want to assign manually. The Assign Role Actions to Roles page determines which role name can perform which particular actions and enables you to modify the action controls accordingly.

All role actions are categorized into functional categories. Administrators assign the role actions. The assignment will be by role and within a particular role the actions will be listed under designated Role Action Categories.

Pages Used to Maintain System Users and Roles

Page Name	Definition Name	Usage
<u>Administer Role Action Category Page</u>	PV_ACT_CATEGORY	View the predefined role action categories.

Page Name	Definition Name	Usage
<u>eProcurement Role Actions Page</u>	PV_ACTIONS_MAINT	View all the predefined role actions delivered, as well as their default action controls.
Role Assigned Page	PV_ACT_ROLES	View roles assigned to a specific role action and related role action controls.
<u>Assign Role Actions To Roles Page</u>	PV_ACTIONS	Use this page to manage role actions and role action categories for each role that is associated with each transaction.

PeopleTools: Security Administration

Administer Role Action Category Page

Use the Role Action Category page (PV_ACT_CATEGORY) to view the predefined role action categories.

Navigation:

eProcurement > Administer Procurement > Maintain System Users and Roles > Role Action Category

This example illustrates the fields and controls on the Administer Role Action Category page.

Administer Role Action Category

Transaction Requisition

Administer Role Action Category

Personalize | Find | First | 1-6 of 6 | Last

Role Action Category	Description	Long Description
1 BU	Business Unit	Business Unit
2 REQACS	Requisition Access	Requisition Access
3 REQDTL	Requisition Line Detail Access	Requisition Line Detail Access
4 REQHDR	Requisition Header	Requisition Header
5 REQMAN	Manage Requisitions	Manage Requisitions
6 REQSRH	Requisition Item Search	Requisition Item Search

Return to Maintain System Users and Roles Return to Administer Procurement

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History

Transaction	Role Action Category and Description
Requisition	• REQACS – Requisition Access • REQDTL – Requisition Line Detail Access • REQHDR – Requisition Header • REQMAN – Manage Requisitions • REQSRH – Requisition Item Search

Transaction	Role Action Category and Description
Workflow	REQWKL – Requisition Workflow
Receiving	RECVIN – Receiving User Functionality
Buyer Center	BYRCNT – Buyer Center

eProcurement Role Actions Page

Use the eProcurement Role Actions page (PV_ACTIONS_MAINT) to view all of the predefined role actions delivered, as well as their default action controls.

Navigation:

eProcurement > Administer Procurement > Maintain System Users and Roles > Role Action Name

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

eProcurement Role Actions							
New Window Help Personalize Page eProcurement Role Actions Q							
Action Name	Description	Transaction	Role Action Category	Description	Object Type	Action Controls	Action Type
ACCOUNTING_DISPLAY	Controls the display of accounting information on a requisition. The assignment of this role action will take precedence over the assignment of the workflow Change all, and Change Distribution actions contained in the Requisition Workflow category.	Requisition	REQACS	Requisition Access	Sections	Editable	ePro&sPro
ADD_MULTII_ITEMS	* CLASSIC ONLY * Controls the display of the multi add buttons on the catalog search results tab. When assigned the user can add multiple items to their cart, favorites and templates. Users with this control can still add items one at a time if they choose.	Requisition	REQSRH	Requisition Item Search	Buttons	Enabled	ePro Only
ADD_SPECIAL_REQUEST	Controls whether the user is shown a link to create a special request when no search results are found.	Requisition	REQACS	Requisition Access	Icon and Hyperlink	Enabled	ePro Only
ALLOW_ADHOC_ONPREVW	Allow add/remove adhoc approvers on requisition preview.	Workflow	REQWKL	Requisition Workflow	Buttons	Disabled	ePro&sPro
ALLOW_ADHOC_ONSUBMIT	Allow submit on requisition preview	Workflow	REQWKL	Requisition Workflow	Buttons	Disabled	ePro&sPro
ALLOW_CHANGE_REQUEST	Users are allowed to edit requisition and/or create change requests to a line that has been sourced to Purchase Order.	Requisition	REQMAN	Manage Requisitions	Fields	Disabled	ePro&sPro
ALLOW_DEFAULT_OPTION	* CLASSIC ONLY * Enable the defaulting options on the Requisition Settings page.	Requisition	REQHDR	Requisition Header	Page	Disabled	ePro&sPro
ALLOW_HOLD	Users are allowed to put a requisition on hold	Workflow	REQWKL	Requisition	Buttons	Disabled	ePro&sPro

This page lists all of the predefined role actions delivered, as well as their default action controls. You cannot modify the data. A user can be assigned multiple roles for a single role action. The system will display the actions within each category in ascending order.

Note: This page can be accessed from the eProcurement Administer Procurement menu, Service Procurement menu, and the Setup Financials/Supply Chain menu. If both eProcurement and Service Procurement are installed, then both product transaction lists will be available for selection. If only one of them is installed, then only the respective transaction lists will be available for selection.

Field or Control	Description
Action Name	Displays the action names specific to the category selected in the Role Action Category page.
Description	Displays the definition of each action.
Object Type	Displays the object type, such as <i>Page</i> , <i>Button</i> , and <i>Fields</i> that the particular role action controls.
Action Controls	Determines how the action will behave for the assigned role. Each action control will have a default value assigned to it. If multiple roles are assigned the same role action but with a different action control, then the least restrictive of the action controls will be used.
Roles Assigned	Click the icon to view other roles to which the role action is assigned.

This table lists Action Controls and describes the online behavior of each:

Action Name	Description
ACCOUNTING_DISPLAY	Controls the display of accounting information on a requisition. The assignment of this role action will take precedence over the assignment of the workflow Change all, and Change Distribution actions contained in the Requisition Workflow category. For more information on how this role action and SCHEDULE_DISPLAY role action work together to control the online requisition behavior, refer to the table that follows this one.
ADD_MULTI_ITEMS	Controls the display of the multi-add buttons on the catalog search results tab. When assigned, users can add multiple items to their cart, favorites, and templates. Users with this control can still add items one at a time if they choose. This Role Action is only for Classic.
ADD_SPECIAL_REQUEST	Controls whether the user is shown a link to create a special request when no search results are found.
ALLOW_ADHOC_ONPREVW	Allow add/remove ad hoc approvers on requisition preview.
ALLOW_ADHOC_ONSUBMIT	Allow submit on requisition preview.

Action Name	Description
ALLOW_CHANGE_REQUEST	Users are allowed to edit requisitions, create change requests, or both to a line that has been sourced to a Purchase Order.
ALLOW_DEFAULT_OPTION	Enables the defaulting options on the Requisition Settings page. This Role Action is only for Classic.
ALLOW_HOLD	Users are allowed to put a requisition on hold.
ALLOW_PURGE	Users are allowed to perform the Purge Staging Table and Purge Change Order Requests in Buyer Center.
ALLOW_REQ_TYPE	This action controls the display of requisition type on fluid Requisition when Bill Only and/or Bill and Replace requisition type is enabled. This Role Action is only for Fluid.
ALLOW_ZERO_PRICE	This action will allow user setting bill only or bill and replace items to zero price.
AMT_ONLY_LINES	This action will display the Amount Only toggle on the checkout page for all lines.
AMT_ONLY_SPECIAL_REQ	This action will display the Amount Only toggle on the Special Request page.
AMT_ONLY_SERVICES	This action will display the Amount Only toggle on the Fixed Cost Service, Variable Cost Service, and Time and Materials pages.
APPLY_WEIGHTED_SORT	Controls whether or not the requester will see weighted sort applied on the search results page in Create Requisition. When enabled, if there is an active weighted sort rule, and relevance is selected as the initial sort option on the ePro installation options > Search settings page, then rule will be applied on all search results. If disabled, next selected sort option in sort configuration section applies, and requester cannot see relevance as a valid option for sorting search results.
CANCHANGEALL	While the eProcurement requisition is in pending approval status, these roles are allowed to change any field on the requisition, including quantity and price, without restarting the approval process.

Action Name	Description
CANCHANGEDISTRIB	While the eProcurement requisition is in pending approval status, these roles are allowed to change any field on the requisition distribution without restarting the approval process.
CANCHANGEHEADER	While the eProcurement requisition is in pending approval status, these roles are allowed to change any field on the requisition header without restarting the approval process.
CANCHANGELINE	While the eProcurement requisition is in pending approval status, these roles are allowed to change any field on the requisition line except the quantity and price without restarting the approval process.
CANCHANGESCHEDULE	While the eProcurement requisition is in pending approval status, these roles are allowed to change any field on the requisition ship/schedule without restarting the approval process.
CANLINKWO	Action is assigned to Roles that are permitted to link to Maintenance Work Order.
CHANGEREQBU	User can change the requester and business unit of a requisition.
CHECKOUT_AFTER_ADD	User will be taken to the Checkout/Review and Submit page each time an item is added to the cart. This Role Action is only for Classic.
CUSTOM_FIELDS	This action will control the display of custom fields on eProcurement Requisition. In order to display custom fields, the PO custom field setting also needs to be enabled at the installation level. Fluid assumes that custom fields are within the delivered drop zones.
CUST_SRCH_RESULT_DISPLAY	This action will control the display of the Customize Search Results section on the My Preferences page. When assigned, users will be able to choose what fields they want displayed for their search results.
DCSUPPLIER_SECURITY	Enable Catalog Security for Direct Connect Suppliers
EDIT_SHIPPING_FOR_ALL_LINES	Controls the display of the Edit for All Lines link in the Shipping Summary section of the Checkout page. If the same role has the ENFORCE_RGN_SECURITY role action assigned, it will take precedence over the assignment of this action. This Role Action is only for Classic.

Action Name	Description
ENFORCE_RGN_SECURITY	This action enforces the regional security on a requisition by restricting the Ship To ID to the requisition default ship to ID. A requester will not be able to change the Ship to ID on the requisition.
EXPRESSFORM_SECURITY	Allow catalog security to be applied to Express Forms.
EXPRESSREQ_ENTRY	This role action authorizes the use of Express Item Entry on the Create Requisition Component.
ITEM_NOTIFICATION	These roles get the worklist notification for the new item request. New item requests can be initiated from the special request page for an item.
LAND_ON_REQ_SETTINGS_PG	Controls whether the Requisition Settings page will be the first page the requester will access. If so, then the user will be able to review and change the Requisition Business Unit, Requester, and default settings before adding items to the requisition. The assignment of this action will take precedence over any assignment of the Initial Page Display option in Requisition Navigation setup.
MASS_APPROVER	Users are allowed to approve many requisitions at one time. This Role Action is only for Classic.
MASS_CHANGE	This action will control the display of the Mass Change link on the requisition review and submit page. If the action control of Enabled is selected, users will be given access to the Mass Change page, where they can change values for the requisition line, schedule, and accounting lines. The assignment of this action will take precedence over the assignment of the EDIT_SHIPPING_FOR_ALL_LINES role action and will allow users to make changes to the Schedule via the Mass Change page. In addition, when the ACCOUNTING_DISPLAY and SCHEDULE_DISPLAY role action controls are set to Display only and Hide and the user has been given access to the Mass Change link, she will not be allowed to make any changes to the requisition accounting or schedule. The information on the Mass Change page will be display only.
MULTI_COMMENTS	Enables multiple comments at the Header and Line. This role action also controls the ability to enter Ship To comments as well as the ability to add attachments to the Header comments.
MULTI_SCHEDULE	Controls whether the user can add multiple schedules to a requisition line item. When enabled, the requisition schedule line will display the add and delete buttons.
NO_CASUAL_RECV	No receiving is allowed for the roles assigned to this action.

Action Name	Description
NO_DEFAULT_RESULT	No search result will be provided by default on the Requisition Manager and the Inquire Receipts page. This Role Action is only for Classic.
NO_ONETIME_SHIPTO	Disables one-time ship-to address access.
ORDER_SHEET_DIST_OPTIONS	Controls the display of accounting information on a requisition Order Sheet Distribution. The assignment of this role action will take precedence over the assignments of other role actions related with accounting information. This Role Action is only for Fluid.
PRICEANDAVAILCHECK	Users who have authority to perform real-time price and availability checks for Marketplace items. This Role Action is only for Classic.
RECV_ALL_SHIPTO	This action allows a casual user to receive all requisitions for all ship to's for the SETID associated with the Receiving BU.
RECV_BY_SHIPTO	This action allows a casual receiver who has the Receive Ship To ID set up in User Preferences to receive all requisitions shipped to that particular ship-to ID.
RECV_CASUAL_ALL	This action should be assigned to user roles of casual users and who should have the authority to cancel their receipts as well as seeing some purchase order details, such as PO item price.
RECV_POWER	The RECV_POWER action should be assigned to Power Users in Receiving. The eProcurement Receive main page for Power Users provides access to all pages in PeopleSoft standard receiving.
REQ_BUYER_SOURCING_CONTROL	Controls the display of the item buyer information section on the line details page for a requester. The buyer information contained in this section is: Buyer Name, Buyer Information link, Consolidate with other Reqs flag, Calculate Price flag, Override Suggested Supplier flag, Inventory Source flag, and the Auto Item Substitute flag. The assignment of this role action will take precedence over the assignment of any of the workflow Change all and Change Line actions contained in the Requisition Workflow category.

Action Name	Description
REQ_CNTRCT_INFO	Controls the display of the item contract information section on the line details page for a requester. The information that is contained in this section is: Contract ID, Contract Search icon, Version number, Contract Line, Category Line, Contract details link, and Use Contract if Available check box. The assignment of this role action will take precedence over the assignment of any of the workflow Change all and Change Line actions contained in the Requisition Workflow category.
REQ_ITEM_DETAILS	Controls the display of the item details section on the line details page for a requester. The item information that is contained in this section is: Merchandise amount, Item ID, Item Substitute search icon, Category, Original Substituted Item ID, Original Substituted Item Description, Inspection Required field, Physical Nature field, Buyer field, Buyer Information link, Item Type, Configurable Info link, RFQ Required flag, Device Tracking flag, Zero Price Indicator flag, Stockless item flag, and Amount Only flag. The assignment of Display only or Hide actions will take precedence over any assignment of the workflow Change all and Change Line actions contained in the Requisition Workflow category.
REQ_ITEM_MANUFACTURER	Controls the display of the item manufacturer information section on the line details page for a requester. The Manufacturer information that is contained in this section is: Manufacturer Name, ID, Item ID, and UPN ID. The assignment of Display only or Hide actions will take precedence over the assignment of any of the workflow Change all and Change Line actions contained in the Requisition Workflow category.
REQ_ITEM_SUBSTITUTE	Controls the display of the item substitute icon on the item search page. When selected, an informational list of substitute items will appear. This role action works in conjunction with the Purchasing Business Unit flags: Enable Item Substitutions and Allow Item Search . Both of these flags need to be enabled along with this role action for the icon to appear. If the role action is not enabled, then the icon will not appear on the search results page.
REQ_ITEM_SUPPLIER	Controls the display of the supplier information section on the line details page for a requester. The supplier information that is contained in this section is: Supplier Name, ID, Supplier Location, Supplier Item ID, and Catalog. The assignment of Display only or Hide actions will take precedence over the assignment of any of the workflow Change all and Change Line actions contained in the Requisition Workflow category.

Action Name	Description
REQ_PROCUREMENT_GROUP	Controls the display of the item procurement group information section on the line details page for a requester. The information that is contained in this section is: Procurement Group ID, Primary Unit check box, Unit Allocation Quantity, and Unit Allocation Amount. The assignment of Display only or Hide actions will take precedence over the assignment of any of the workflow Change all and Change Line actions contained in the Requisition Workflow category.
REQ_SETTINGS_PG_ACCESS	Controls whether the requester has access to the requisition settings link and page. The requisition settings link takes users to the requisition settings page, where they can review and change the Requisition Business Unit, Requester, and default settings of a requisition. Access to this link will appear at the top of all pages of the requisition. If the control chosen is to hide the link, then this assignment will take precedence over the assignment of these role actions: LAND_ON_REQ_SETTINGS_PG, ALLOW_DEFAULT_OPTION, and CHANGEREQBU.
RESTRICT_INV	Allows a requester to only see inventory items and ordering unit of measures when searching for requisition items. No supplier information will be shown. This action should only be used when Search Engine is installed and used for item searching.
SCHEDULE_DISPLAY	Controls the display of schedule information on a requisition. Because the schedule and the accounting information appear together on the requisition, rules were established as to how the settings of this role action and the settings of the accounting role action will work together. For more information on how this role action and ACCOUNTING_DISPLAY role action work together to control the online requisition behavior, refer to the table that follows this one.
SHIPVIA_FREIGHT_DISPLAY	Controls the display of the Ship Via and Freight Terms field on the requisition schedule. This role action works in conjunction with the ACCOUNTING_DISPLAY and SCHEDULE_DISPLAY role actions. Schedule information needs to be visible in order for the fields to be displayed.
SPECIAL_REQUEST_SEARCH	Controls if Special Request will display Catalog Items search results after clicking the Add button. The Search feature will use the Item Description (the selected special request search option fields in Installation) to find related catalog items. Users will have the option to continue to add special request or use only catalog items. Users need to enable the Search Framework on the eProcurement Installation page to use this option.

Action Name	Description
SP_ADD_SERV_PROVIDER	Add Service Provider role action. This role action enables adding of Service Providers from the Maintain Service Provider component on the Supplier portal. This Role Action is only for Classic.
SP_ADD_WO_ADHOC_ACT	Allow user to create new activities while adding a Work Order This Role Action is only for Classic.
SP_ALLOW_PASTDATE	Allow Past Date role action. The system will allow the user to create Service Requisitions with start dates in the past for the roles assigned to this role action. This Role Action is only for Classic.
SP_COMMON_ROLES	Common Roles role action. Common Role assigned to all types of Services Procurement users. When users are created using the Service User Setup wizard, all users will be assigned roles that have this role action. This Role Action is only for Classic.
SP_COORDINATOR_BUYER	Service Coordinator Buyer role action. A Service Coordinator Buyer is an employee with the ability to Edit the sourced requisition, Cancel the Requisition, View the life cycle, view Service Projects and Service Activities, view Service Requisitions/lines, Source Requisitions, communicate with Suppliers, view Bid/response information, create and manage Work Orders, and view Time sheets and Expenses. This Role Action is only for Classic.
SP_EXPENSE_PROXY	Expense Proxy role action. Users with this role action have the ability to enter Expenses on behalf of the Service Provider. This Role Action is only for Classic.
SP_OVERRIDE_SUR_FLG	Override Survey Flag role action. User with this role action will be able to override the Require Survey flag, defaulted from the Service Type, on the Work Order. This Role Action is only for Classic.
SP_PROVCNTACT_ACTION	Service Provider Contact role action. A Service Provider contact is a supplier user who submits candidates and manages assignments from the supplier side. Users with this role action are able to create progress logs and view supplier facing Work Orders. This Role Action is only for Classic.

Action Name	Description
SP_REPLACE_SC_ACCESS	Service Coordinator/Team Replacement Access role action. This role action allows access to the Replace Coordinator and Replace VMS Coordinator components. Users with this role action can search Requisitions and Work Orders and replace Coordinators on these transactions. This Role Action is only for Classic.
SP_REQUESTER	Requester role action. A Requester is an employee with the ability to create and manage Service Projects and Service Activities, create and manage Service Requisitions/lines, view Service Sourcing information, view Bid/response information view Work Orders, and approve Time sheets time and Expenses and create Progress Logs. This Role Action is only for Classic.
SP_SRVC_COORDINATOR	Service Coordinator role action. A Service Coordinator may be an internal user or a supplier user. Users with this role action are able to access coordinator related user preferences and defaults, coordinator replacement log, rate and bid factor information, and work order shifts / assignments. They can maintain distribution lines for copied/extended requisitions, edit number of positions, source work order replacements, create interviews, and trigger creation of work order from filled bids. Users with this role action can also perform various actions in an MSP environment, such as add / extend work orders, edit work order milestones / activities, and access work order pay rate information. This Role Action is only for Classic.
SP_TIME_ADJUST	Time Adjustment role action. Ability to adjust a timesheet. Users with this role action can adjust Timesheets after the Timesheet has been submitted for approval. This Role Action is only for Classic.
SP_TIME_ADJUST_TRC	Time Adjust TRC role action. Ability to adjust time categories for a Timesheet. This role action applies when the Time Template is not set for Manual TRC entry. It allows users to adjust Time Reporting Categories assigned to a submitted Timesheet. This Role Action is only for Classic.
SP_TIME_HIDE_TRC_SUM	Time Hide TRC Summary role action. Role action to hide over time Time Reporting Code summary on the Timesheet submit page. This Role Action is only for Classic.

Action Name	Description
SP_TIME_PROXY	Time Proxy role action. Users with this role action have the ability to enter Timesheets on behalf of the Service Provider. This Role Action is only for Classic.
SP_VIEW_REQ_APPROVAL	View Requisition Approval Details role action. Users with this role action can view Requisition Approval details, when applicable, on the Requisition Summary page in Services Procurement. This Role Action is only for Classic.
SP_VIEW_RT_BREAKDOWN	View Rate Breakdown role action. This role action displays rate breakdown information on Requisition, Bid and Work order pages. (Total Supplier rate and Expenses will still be shown). This Role Action is only for Classic.
SP_VIEW_SUPPLIER_INFO	View Sourcing Page role action. Enable Sourcing Preferences from the Services Procurement Requisition page - this role action enables the Sourcing Preferences functionality for sPro Requisition. This Role Action is only for Classic.
SP_VIEW_UNROUTED	View Not Routed Service Provider Resumes for the Ongoing Bids to the Requestor. This Role Action is only for Classic.
SP_VMS_MSP_BREAKDOWN	Requester users with this role action can see VMS/ MSP rate, VMS /MSP amount, and supplier rate information on Requisition, Bidding and Work Order pages for VMS or MSP managed transactions. This Role Action is only for Classic.
SP_WO_CHNG_WSP	Allow user to change Where Service Performed Location value on the Work Order. This Role Action is only for Classic.
SUPP_PRICE_BREAKDOWN	Controls whether a Price Breakdown icon will appear on the item search results page. The icon will indicate to the user that price breakdowns have been defined for the item. When the icon is selected, the user will be able to view the defined price breakdowns by unit of measure for that item supplier combination.

Action Name	Description
SYSTEM_ADMIN	Procurement System Administrator. This action allows access to the System Administration Admin functionality.
TEMPLATE_SECURITY	Allow catalog security to be applied to Company Templates (Purchasing Kits).
VAT_DETAILS	This action allows users to view VAT Schedule and VAT Distribution details. It also allows users to override VAT related fields, such as VAT code, VAT applicability, VAT Transaction Type, and so on.
VIEW_ALL_SUPPLIERS	This action will allow a user to view all suppliers when browsing or searching.
VIEW_CONTRACT	Controls whether the contract icon will appear on the search results page so the user can view contract information for the item. This role action will also control the appearance of the Contract Search section on the Advanced Search page.
VIEW_INVENTORY_ICON	This action controls the display of the inventory item icon on the item search result pages. If this action is used, an inventory item icon will appear if the item is marked as an inventory item in the master item table.
VIEW_ORDERING_UOM	When assigned, the Default Req UOM defined on the Unit of Measure page will be used for the item on a requisition. This action also allows viewing the ordering units of measure for an item on the Requisition Item Description page.
VIEW_PRICEADJUSTMENTS	Controls the display of the price adjustments icon on the item search page without having to drill into the item details. This action will also control the display of price adjustments on the requisition schedule.
VIEW_REQ_CYCLE	This action adds View Req Cycle option to the dropdown list of actions on the Manage Requisition page This Role Action is only for Classic.
VIEW_SUPPLIER_UOM	When assigned, only UOMs defined on the Item Supplier UOM page for an Item/Supplier/Location will be available for the item on the requisition search results display UOM prompt. VIEW_ORDERING_UOM action will take precedence over this role action.
WF_EXPAND_APPROVERS	Users in this role will always see the 'Review / Edit Approvers' section in the eProcurement Approval page as expanded. Otherwise, it will default to being collapsed by default, when the user is approving a requisition.

Action Name	Description
ALLOW_RUSH_REQ	If the ALLOW_RUSH_REQ is enabled, the requester will be able to use the option Rush in the Priority field to set the fluid requisition priority to Rush, which allows special processing and approvals. This role action is only for Fluid, and by default, it is disabled.

The following table provides details on how the online requisition pages behave when the role actions SCHEDULE_DISPLAY and ACCOUNTING_DISPLAY are assigned to a user role with various combination of action controls.

Action Controls for SCHEDULE_DISPLAY	Action Controls for ACCOUNTING_DISPLAY	Online Behavior
Display Only	Editable	Schedule becomes editable along with the accounting information on the Review and Submit Requisition Settings and the Mass Change pages. The Edit For All Lines link appears. Users can copy the default values specified on the Requisition Settings page for line and schedule level to the Edit Lines, Shipping, and Accounting Information page.
Display Only	Hide	All Schedule fields appear only on the Requisition Settings page, the Shipping section on the Mass Change page, and the Shipping section on the Review and Submit page. The Edit For All Lines link does not appear. Accounting related fields are hidden. Users cannot copy the default values specified on the Requisition Settings page for line, schedule, and distribution level to the Edit Lines, Shipping, and Accounting Information page.
Display Only	Display Only	Accounting and Schedule information appears only on the Requisition Settings, Mass Change, and Review and Submit pages. The Edit For All Lines link does not appear. Users cannot copy the default values specified on the Requisition Settings page for line, schedule, and distribution level to the Edit Lines, Shipping, and Accounting Information page.

Action Controls for SCHEDULE_DISPLAY	Action Controls for ACCOUNTING_DISPLAY	Online Behavior
Editable	Editable	Schedule and Accounting information becomes editable in the requisition component. The Edit For All Lines link appears, enabling editing. Users can copy default values specified on the Requisition Settings page for line and schedule level to the Edit Lines, Shipping, and Accounting Information page.
Editable	Hide	Schedule information is editable in the requisition component. The Edit For All Lines link appears, enabling editing. Accounting information, including Distribute by and SpeedChart, is hidden. Users can copy the default values specified on the Requisition Settings page for line and schedule level to the Edit Lines, Shipping, and Accounting Information page.
Editable	Display Only	Schedule information is editable in the requisition component. The Edit For All Lines link appears, enabling editing. Accounting information, including Distribute by, is display-only. SpeedChart is hidden. Users can copy default values specified on the Requisition Settings page for line and schedule level to the Edit Lines, Shipping, and Accounting Information page.
Hide	Editable	Schedule becomes editable along with the accounting information on the Review and Submit Requisition Settings and the Mass Change pages. The Edit For All Lines link appears.
Hide	Hide	Accounting and Schedule information is hidden on the Review and Submit, Requisition Settings, and Mass Change pages. The Edit For All Lines link and Shipping Summary section are hidden.
Hide	Display Only	Schedule becomes display-only along with the accounting information on the Review and Submit, Requisition Settings, and Mass Change pages. The Edit For All Lines link is hidden.

Role Assigned

This page allows the administrator to view all other roles assigned to a specific role action and related role action controls. Administrators can collectively change the action controls for all the roles assigned here. To access this page, click the **Role Assigned** icon on eProcurement Role Actions page.

This example illustrates the fields and controls on the Role Assigned page.

Roles Assigned

Role Action Name

SP_COMMON_ROLES

Other Roles Assigned

Personalize

Find

First

1-4 of 4

Last

Role Name	Object Type	Action Controls
SP_COORDINATOR	Sections	Editable
SP_REQUESTER	Sections	Editable
ePro Novice Requester	Sections	Hide
ePro Requester	Sections	Display Only

OK

Cancel

Note: After you make changes on the Role Assigned page, click the **OK** button and then click the **Save** button on the Role Action page.

Assign Role Actions To Roles Page

Use the Assign Role Actions To Roles page (PV_ACTION) to manage role actions and role action categories for each role that is associated with each transaction.

Navigation:

eProcurement > Administer Procurement > Maintain System Users and Roles > Assign Role Actions to Roles

This example illustrates the fields and controls on the Assign Role Actions to Roles page. You can find definitions for the fields and controls later on this page.

Assign Role Actions To Roles

Transaction Requisition

Role Name ePro Requester

Description eProcurement Requester

Copy From Role

eProcurement Role Action Category

Find | View All

First 1 of 4 Last

Role Action Category REQACS

Requisition Access

Role Action		Personalize	Find	View All	1-5 of 7	Last
Action Name	Description	Object Type	Action Controls	Other Roles Assigned		
1 VAT_DETAILS	This action allows user to view VAT Schedule and VAT Distribution details. It also allows users to override VAT related fields such as VAT code, VAT applicability, VAT Transaction Type, etc.	Icon and Hyperlink	Enabled	60		
2 PRICEANDAVAILCHECK	Users who have authority to perform real-time price and availability checks	Buttons	Enabled	60		
3 NO_ONETIME_SHIPTO	Disable one-time ship to address access	Icon and Hyperlink	Disabled	60		
4 MULTI_COMMENTS	Enable Multiple Comments on requisition.	Icon and Hyperlink	Enabled	60		
5 ENFORCE_RGN_SECURITY	This action enforces the regional security on a requisition by restricting the Ship To Id to the requisition default ship to id. A requester will not be able to change the Ship to Id on the requisition.	Fields	Enabled	60		

Return to Maintain System Users and Roles

Return to Administer Procurement

Save Return to Search Previous in List Next in List Notify

Add Update/Display

Use this page to manage role actions and role action categories for each role that is associated with each transaction. However, if role actions are not assigned to any roles, then the system will use the delivered default action control.

- As you enter the page, select a transaction.
- Select a role name that is associated with the transaction.
- In the **Role Action Category** field, select from the eProcurement categories that are predefined on the Administrator Role Action Category page.
- In the **Action Name** field, select from the predefined eProcurement role action names.
- In the **Action Controls** field, select how the system should display the action category.

Field or Control	Description
Copy From Role	Select a role to copy from. This option enables you to populate the fields on this page, which can speed up the process of creating a new record.

eProcurement Role Action Category

<i>Field or Control</i>	<i>Description</i>
Role Action Category	Select from the list of eProcurement categories that are predefined on the Administrator Role Action Category page. This field indicates the type of access that the user role has, such as requisition line detail access, timesheet access, and so on. The users are specified in the Role Action section of the page. These values are pre-delivered. Multiple role action categories can be added to the transaction by using the Add button.

Role Action

<i>Field or Control</i>	<i>Description</i>
Action Name	Displays eProcurement role action names that are predefined.
Object Type	Displays the objects managed by a specific role action. For example, VAT_DETAILS Action Name controls icons and links on the requisition.
Action Controls	Displays the action that can be performed by the user role. Options include: <i>Enabled</i> , <i>Disabled</i> , <i>Display Only</i> , <i>Editable</i> , and <i>Hide</i> .
Other Roles Assigned	Click to access the Other Roles Assigned modal window. This window displays the Role Name, Object Type, and Action Control of other user roles that are assigned to the role action name.

Maintaining Approval Workflow

PeopleSoft eProcurement uses the Approval Workflow Framework for requisition approval rather than the standard PeopleSoft Workflow. For more information, refer to the “Understanding the Approval Framework Process Flow” (Approval Framework).

Maintaining Supplier Integration

This section provides an overview of supplier integration and discusses how to maintain supplier integration.

Page Used to Maintain Supplier Integration

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Maintaining Supplier Integration Page	PV_ADM_MARKETSITE	Maintain supplier integration. Access the pages that you use to set up direct connect supplier integration and marketplace integration. Access is limited to users with the SYSTEM_ADMIN action role.
Linked Suppliers Page	PV_MS_SEC_SUPPLIER	Setup third-party suppliers as PeopleSoft suppliers. Third-party suppliers can include suppliers from the Oracle Business Network, marketplace, direct connect suppliers, and catalog management suppliers.

Understanding Supplier Integration

The Maintain Supplier Integration page supplies links to set up third-party suppliers to PeopleSoft eProcurement. If you are planning to pass purchase orders from PeopleSoft eProcurement to the Oracle Business Network, a supplier's website, or to a marketplace, then use these pages to synchronize the applications.

Related Links

[Understanding Direct Connect Supplier Integration](#)

[Understanding Transparent Punchout](#)

“Defining Custom Item Attributes” (PeopleSoft Managing Items)

Maintaining Supplier Integration Page

Use the Maintain Supplier Integration page (PV_ADM_MARKETSITE) to maintain supplier integration.

Access the pages that you use to set up direct connect supplier integration and marketplace integration. Access is limited to users with the SYSTEM_ADMIN action role.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration

This example illustrates the fields and controls on the Maintain Supplier Integration page (1 of 3).

Maintain Supplier Integration	
Marketplace Integration	
Menu	Description
Correct Item Load Errors	Correct Inventory Item Load Errors
EDX PO Dispatch Types	Define types of the EDX PO Dispatch method
Integration Data Value Mappings	Integration Data Value Mappings
Marketplace Buyers	Maintain Marketplace Buyers
Marketplace Registration	Register as a Trading Partner with a Marketplace
Linked Suppliers	Maintain Linked Suppliers
Marketplace Test	Transmit a predefined Purchase Order to a Marketplace using a predefined test supplier.
Import Item Catalog File	Import External Item Catalog Data
Validate and Process Imported Items	Validate and Process Imported Items
Item Attributes	
Menu	Description
Attribute Name Cross Reference	Maintain Attribute Name Cross-Reference
Attributes Staging Table	Verify attributes data imported in the Staging Table
Category Attributes	Maintain category attributes loaded from Marketplace
Import Attributes	Import Attributes to Staging Table from a File
Item Attributes	Maintain item attributes loaded from Marketplace
Load Attributes	Load Attributes from the Staging Table to the Category and Item Attributes Tables.

This example illustrates the fields and controls on the Maintain Supplier Integration page (2 of 3).

Express Forms	
Menu	Description
Maintain Supplemental Data	Define Custom Form using Supplemental Data Framework
Maintain Express Form Profile	Maintain Express Form Profile
Direct Connect	
Menu	Description
Direct Connect Methods	Define Direct Connect integration methods & standards
Integration Broker Integration Point Wizard	Integration Broker Integration Point Wizard
Integration Broker Node Definitions	Define Integration Broker Node Definitions
Integration Broker Routing Definitions	Define Integration Broker Routings
Integration Broker Service Definitions	Define Integration Broker Services
Integration Broker Service Operation Definitions	Define Integration Broker Service Operations
Supplier Value Cross-Reference	Supplier Value Cross-Reference

This example illustrates the fields and controls on the Maintain Supplier Integration page (3 of 3).

Search Indexes	
Menu	Description
Build eProcurement Search Index	Build eProcurement Search Index for search type "Secured Enterprised Search" to be used in item searching in eProcurement requisitions.
Deploy/Delete Object	Deploy search definitions and search categories.
Search Definition	Define search index fields and facets, etc.
Search Category	Define search category.
Return to Administer Procurement	

Use these pages to navigate to other pages to set up suppliers and marketplace integration.

Linked Suppliers Page

Use the Linked Suppliers page (PV_MS_SEC_SUPPLIER) to setup third-party suppliers as PeopleSoft suppliers.

Third-party suppliers can include suppliers from the Oracle Business Network, marketplace, direct connect suppliers, and catalog management suppliers.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Linked Suppliers

This example illustrates the fields and controls on the A linked supplier with the Marketplace Supplier type is used to connect to a marketplace or to the Oracle Business Network. You can find definitions for the fields and controls later on this page.

[Linked Suppliers](#)
[Supplier Properties](#)
[Marketplace Configuration](#)

Linked Suppliers

Type **MarketPlace Supplier**

SetID **SHARE CORPORATE SETID**

Supplier ID **SCM0000001** Location **MAIN**

EDX PO Dispatch Type 
PO Dispatch Node 
Linked Supplier ID
Linked Supplier Name
Identifier Type 
Buyer Account Code
Direct Connect Method 
Direct Connect Node 
Transparent Punchout Node 

[Return to Maintain Supplier Integration](#)
[Return to Administer Procurement](#)

This example illustrates the fields and controls on the A linked supplier with the Direct Connect Supplier type is used to connect to a supplier's website. You can find definitions for the fields and controls later on this page.

Linked Suppliers

Supplier Properties

Linked Suppliers

Type Direct Connect Supplier

SetID SHARE CORPORATE SETID

Supplier ID AUS0000002 Location MAIN

EDX PO Dispatch Type

PO Dispatch Node

Direct Connect Method

PUNCHOUT

Direct Connect Node

PSFT_PA

[Return to Maintain Supplier Integration](#)

[Return to Administer Procurement](#)

This example illustrates the fields and controls on the A linked supplier with the Catalog Management Supplier type. You can find definitions for the fields and controls later on this page.

Linked Suppliers

Linked Suppliers

Type Catalog Management Supplier

SetID SHARE CORPORATE SETID

Supplier ID USA0000014 Location MAIN

EDX PO Dispatch Type

PO Dispatch Node

Trading Partner ID1007

Trading Partner NameInternational Outfitters

[Return to Maintain Supplier Integration](#)[Return to Administer Procurement](#)

Use the Linked Suppliers page to connect a PeopleSoft supplier ID to a third-party supplier such as suppliers from the Oracle Business Network (OBN), marketplace, direct connect suppliers, and catalog management suppliers.

Field or Control	Description
Type	Select the type of supplier that the SetID, Supplier ID, and Location represents. Options include: <i>Catalog Management Supplier</i> Select to set up links for a catalog management supplier. See Understanding Supplier Data. <i>Direct Connect Supplier:</i> Select to set up links for a direct connect supplier or a Transparent Punchout supplier. See Understanding Direct Connect Supplier Integration. <i>MarketPlace Supplier:</i> Select to set up links for a marketplace supplier or for a supplier within the Oracle Business Network. See Understanding the Integration Between a Marketplace and PeopleSoft eProcurement. See Understanding the Integration Between the Oracle Business Network, PeopleSoft eProcurement, and PeopleSoft eSettlements.
Supplier ID and Location	Select the PeopleSoft supplier and supplier location that you wish to link to a third-party supplier. Note: If a PeopleSoft supplier was previously linked, it can't be linked to another node. That supplier does not appear in the Supplier ID prompt.
EDX PO Dispatch Type (electronic data transfer purchase order dispatch type)	Define the format of the purchase order document to be dispatched to a supplier's website, the Oracle Business Network, or a marketplace. Your entry in this field determines what fields are editable on the rest of this page; for example, if you select OAG72 (for an OBN supplier) then the system enables the fields needed to link a PeopleSoft supplier to an OBN supplier. The options are: <i>CXML12</i>: to use the cXML format. <i>OAG72</i> to use the OAG format to integrate to the Oracle Business Network. <i>XCBL30</i>. to use the xCBL format.
PO Dispatch Node (purchase order dispatch node)	Select the node to be used for the dispatch type. This is used in the dynamic dispatching process. See Setting Up Dynamic Dispatching.

Field or Control	Description
Linked Supplier ID (OBN or marketplace supplier only)	Define the supplier ID for: - The supplier within the Oracle Business Network. This is the OBN supplier company ID. - The supplier within a marketplace. Enter the 64-bit universal identifier for a marketplace trading partner. Supplier participant ID's are defined within a marketplace and cannot be changed. The system uses ID's to identify the supplier of an item when transferring information. This is a required field for an OBN or marketplace integration. No validation is performed on this field value, if data is incorrect or missing then the integration will fail.
Linked Supplier Name (OBN or marketplace supplier only)	Enter the name of the OBN or marketplace supplier.
Trading Partner ID (catalog management supplier only)	The identification number of the supplier that provides item catalogs to be loaded into PeopleSoft eProcurement.
Trading Partner Name (Catalog Management Supplier only)	The name of the catalog management supplier.
Identifier Type (OBN supplier only)	Enter the partner type defined for this supplier in OBN. The options are: <i>DUNS</i>: DUNS number <i>GLN</i>: Global location number <i>MISC</i>: Miscellaneous number <i>PHONE</i>: Telephone number <i>TAXID</i>: U.S. Federal Tax Identifier
Buyer Account Code (marketplace supplier only)	Enter the account code that is used by a marketplace supplier that identifies the PeopleSoft eProcurement buyer.
Direct Connect Method (OBN supplier, marketplace supplier, or direct connect supplier)	Select the direct connect method that you want to use in order to do business with this supplier. Options include: <i>PUNCHOUT</i>: Uses the cXML 1.2.008 standard to define a supplier for Punchout or Transparent Punchout. <i>ROUNDTRIP</i>: Uses the xCBL standard based off of the OCI 2.0b spec to define a supplier for Roundtrip. <i>ROUNDTRIP MP</i> Defines a marketplace for Roundtrip.

Field or Control	Description
Direct Connect Node (OBN supplier, marketplace supplier, or direct connect supplier)	Select the node that is associated with this supplier, marketplace, or the Oracle Business Network. Note: You associate each Linked Supplier with its specific Direct Connect Node. It is a one-to-one relationship. You may not associate several Linked Suppliers to a single Direct Connect Node.
Transparent Punchout Node	Enter the PeopleSoft Integration Broker node used for Transparent Punchout to this supplier. This field is only displayed if you have enabled the Transparent Punchout feature on the eProcurement Installation Options page. Once the Transparent Punchout node is entered in this field, the supplier and node are included in search results performed within an eProcurement requisition. The requester must have access to the catalog linked to the supplier on this page.

Supplier Properties

Access the Supplier Properties page.

Navigation:

eProcurement > Administer Procurement

Click the **Maintain Supplier Integration** link.

Click the **Linked Suppliers** link.

Select the Supplier Properties tab on the Linked Suppliers page.

This example illustrates the fields and controls on the Supplier Properties page.

Linked Suppliers
Supplier Properties
Marketplace Configuration

Linked Suppliers

Type MarketPlace Supplier

SetID SHARE CORPORATE SETID

Supplier ID SCM0000001 Location MAIN

Load Direct Connect Properties

Details
Personalize | Find | View 10 | First 1-16 of 16 Last

	Property Name	Property Value	Description		
1	ALLOW_EDIT	N	"Y" if vendor allows editing of		
2	ALLOW_PO_CHNG	N	"Y" if vendor allows changes to		
3	ALLOW_SHIPPING_EDIT	N	"Y" if vendor allow shipping info.		
4	ALLOW_VIEW	N	"Y" if vendor allows viewing of		
5	CATEGORY_ID	00001	Default Category ID for this vendor		
6	FILE_STATUS_URL	http://marketplacedev.vinimaya.			
7	FROM_DOMAIN	NetworkId	Header.From.Credential.domain		
8	FROM_IDENTITY	Vini	Header.From.Credential.Identity		
9	KEYWORDS		Search keywords		
10	LOAD_PORTAL	N	Load Portal upon return from		
11	PING_URL	http://marketplacedev.vinimaya.			
12	SENDER_DOMAIN	NetworkId	Header.Sender.Credential.domain		

Supplier properties store the details of how a particular supplier interacts with a direct connect method and identifies some of the information that the supplier expects to be sent in the XML. You can also enter a default value for each field on the requisition line for this particular supplier's direct connect items.

You can enter default information for items that are returned from the direct connect supplier on this page. This default value only applies to a field if the supplier sends a null value for that field in the service operation passed back to PeopleSoft; otherwise, the supplier's value overrides the defaults.

To check if the marketplace service is running you have to add a property PING_URL to the supplier properties list. This property will check against the URL given as Property Value to validate if the particular marketplace exists. Adding this property is optional. Another property FILE_STATUS_URL has to be added manually to check the status of item/supplier files that are uploaded to the marketplace. If the property is not added or if the marketplace is down then user will be alerted by a warning message about the file status not being checked.

Field or Control	Description
Load Direct Connect Properties	Click to load the property name and descriptions of the direct connect method specified on the Linked Suppliers page.

Marketplace Configuration

Access the Marketplace Configuration page.

Navigation:

eProcurement > Administer Procurement

Click the **Maintain Supplier Integration** link.

Click the **Linked Suppliers** link.

Select the Marketplace Configuration tab on the Linked Suppliers page.

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

[Linked Suppliers](#)
[Supplier Properties](#)
[Marketplace Configuration](#)

Linked Suppliers

Type MarketPlace Supplier

SetID SHARE CORPORATE SETID

Supplier ID SCM0000001 Location MAIN ☒ Active

FTP Information

Login Name	Password	Server/Record Name/URL Id	Pathname
ftpuser	*****	10.241.88.188	fscm92/epro

Refresh File Status

File Status

File Name	Date Generated	Status at Marketplace
1 Full items without suppliers.	08/25/2014 1:35PM	Invalid
2 Full items with suppliers.	08/25/2014 1:31PM	Invalid
3 Suppliers	08/25/2014 1:31PM	Invalid

Field or Control	Description
Active	Select to indicate that the particular linked supplier is an active marketplace supplier. Note: Only one supplier can be active at a time.

Field or Control	Description
FTP Information	Enter FTP server values from which the file containing internal catalog information can be accessed by the marketplace for processing.
File Status	Displays the list of files containing the internal catalog information, generated during the search engine indexing along with the date it was generated.

Note: The Marketplace Configuration tab appears when the Transparent Punchout Node field is populated and the Consolidate Marketplace Items in Search Results and Facets check box is selected on the eProcurement Installation Options page.

Running PeopleSoft eProcurement Processes

This section provides an overview of eProcurement Processes and discusses how to run PeopleSoft eProcurement processes.

Page Used to Run PeopleSoft eProcurement Processes

Page Name	Definition Name	Usage
<u>Run eProcurement Processes Page</u>	PV_ADM_ALL_PROCESS	Run PeopleSoft eProcurement processes. Access is limited to users with the SYSTEM_ADMIN eProcurement role action.

Understanding the eProcurement Processes

PeopleSoft eProcurement has grouped the standard processes that you can run. These processes include:

- Procurement processes that include, for example, dispatching purchase orders, expediting requisitions, quick sourcing requisitions, and running inventory demand.
- Marketplace processes, which include building the Search Engine collection of items, loading items, and importing item catalogs.
- Procurement card processes that work with bank statements and vouchers.
- Receiving and return-to-supplier processes that include processing and loading receipts, Workflow notification, and reconciling return-to-supplier items.
- Requisition processes that include reconciling requisitions, reopening closed requisitions, and building item search indexes.

Run eProcurement Processes Page

Use the Run eProcurement Processes page (PV_ADM_ALL_PROCESS) to run PeopleSoft eProcurement processes.

Access is limited to users with the SYSTEM_ADMIN eProcurement role action.

Navigation:

eProcurement > Administer Procurement > Run eProcurement Processes

This example illustrates the fields and controls on the Run eProcurement Processes page.

Run eProcurement Processes	
Processes	
Menu	Description
Procurement Processes	PO Dispatch, Requisition Expediter, Quick Sourcer, Inventory Demand, PO Calculation/Create/Change, Purge, etc.
Marketplace Processes	Process Catalog Upload Process (CUP) File
PCard Processes	Procurement Card Processes
Receiving and RTV Processes	Process/Close/Load/Accrue Receipts, Receipt Notification, Reconcile Return To Vendor (Supplier), etc.
Requisition Processes	Load Requisitions, Reconcile Requisitions, Reopen Closed Requisitions, Build Item Search Indexes, etc.
Workflow Processes	Process Amount Approval Initialization or Field Trigger Approval Initialization
Return to Administer Procurement	

Use this page to navigate to other pages where you can run standard eProcurement processes.

Maintaining Procurement Options

Procurement options control a variety of requisition, purchase order, receiving, and procurement card information.

This section discusses how to assign catalogs to a purchasing business unit and set up return to supplier instructions.

Pages Used to Maintain Procurement Options

Page Name	Definition Name	Usage
Assign Catalogs to Business Unit Page	PV_REQ_BU_CAT	Assign catalogs to a PeopleSoft Purchasing business unit. Limit the items that are available to a user by restricting the user to an item catalog. You can also restrict user access to items by attaching item catalogs to the requester on the Requester's Setup page.
Purchasing Kit Definition Page	PURCH_KIT_TBL	Set up item purchasing kits for requisitions.
Setup Instructions for Return to Vendor Page	PV_RTV_ADMIN	Set up return to vendor instructions.

Related Links

“Understanding Procurement Options” (PeopleSoft Source to Settle Common Information)

Assign Catalogs to Business Unit Page

Use the Assign Catalogs to Business Unit page (PV_REQ_BU_CAT) to assign catalogs to a PeopleSoft Purchasing business unit.

Limit the items that are available to a user by restricting the user to an item catalog. You can also restrict user access to items by attaching item catalogs to the requester on the Requester's Setup page.

Navigation:

eProcurement > Administer Procurement > Maintain Procurement Options > Assign Catalog to BU

This example illustrates the fields and controls on the Assign Catalogs to Business Unit page. You can find definitions for the fields and controls later on this page.

Assign Catalogs to Business Unit

Business Unit US001

List of Catalogs Personalize | Find | View All | First 1 of 1 Last

Catalog ID	Enabled
1 ALL_PURCHASE_ITEMS	☒

[Return to Administer Procurement](#)

Field or Control	Description
Business Unit	Enter a business unit to which you are assigning catalogs. Any user who enters PeopleSoft eProcurement requisitions using this business unit can select only the items in the catalogs that appear in the Catalog ID field.
Catalog ID	Enter item catalogs.
Enabled	Select to indicate that the item catalog is available to requesters that are associated with this business unit.

Note: To enable the entries on this page, enter *Y* in the **BU Catalog Control** (business unit catalog control) field on the eProcurement Installation Options page. If you are using role-based catalog security, this field will be hidden.

See [Setting Up Catalog Security](#).

Related Links

“Understanding Procurement Options” (PeopleSoft Source to Settle Common Information)

Setup Instructions for Return to Vendor Page

Use the Setup Instructions for Return to Vendor page (PV_RTV_ADMIN) to set up RTV instructions.

eProcurement > Administer Procurement > Maintain Procurement Options > Return to Vendor Instructions

This example illustrates the fields and controls on the Setup Instructions for Return to Vendor page. You can find definitions for the fields and controls later on this page.

Setup Instructions for Return to Vendor

SetID: SHARE

Add

< 1-2 of 2 >

Instr. Code: General Instruction (top)
Delete

RTV Instruction: Notify billing department. Include receipt number and invoice number.

Instr. Code: Items shipped from Inventory
Delete

RTV Instruction: Note reason for return on the packing slip.

[Return to Administer Procurement](#)

Field or Control	Description
Instr. Code (instruction code)	Select how you want instructions to appear on the Return to Supplier page. Values are: <i>General Instructions (top)</i>: At the top of the page under the first heading. <i>Return Qty Shipped to Supplier</i> (return quantity shipped to supplier): Below the shipment and supplier information heading if the return to vendor status is <i>Shipped</i>. <i>Saved confirmation page text</i>: When you click the Save button on the Return to Supplier page. <i>Ship Qty instruction</i> (ship quantity instruction [bottom]): Below the shipment and supplier information heading, if the return to supplier status is <i>Open</i>.
RTV Instruction (return to vendor instruction)	Enter the instruction details for the instruction that you selected in the Inst. Code field.

Maintaining the Accounting Structure

This section discusses how to maintain the accounting structure.

Page Used to Maintain the Accounting Structure

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Maintain Accounting Structure Page</u>	PV_ADM_ACCOUNTING	Use the Maintain Accounting Structure page to view and maintain accounting information for PeopleSoft eProcurement to record the transactions in the general ledger. Accounting personnel should define these codes. Access is limited to users with the SYSTEM_ADMIN action role.

Related Links

“Defining and Using ChartField Value Sets” (Application Fundamentals)

Maintain Accounting Structure Page

Use the Maintain Accounting Structure page (PV_ADM_ACCOUNTING) to use the Maintain Accounting Structure page to view and maintain accounting information for PeopleSoft eProcurement to record the transactions in the general ledger.

Accounting personnel should define these codes. Access is limited to users with the SYSTEM_ADMIN action role.

Navigation:

eProcurement > Administer Procurement > Maintain the Accounting Structure

This example illustrates the fields and controls on the Maintain Accounting Structure page.

Maintain Accounting Structure

Accounting General	
Menu	Description
Account Types	Setup Account Types
Accounting Entry Templates	Setup Accounting Entry Templates
Accounts	Setup Accounts
Alternate Accounts	Setup Alternate Accounts
Departments	Setup Department Codes
Products	Setup Product Codes
Projects	Setup Project Codes
SpeedCharts	Setup SpeedCharts
Statistics Codes	Setup Statistics Codes

ChartField Combinations	
Menu	Description
ChartField Editing Template	Setup ChartField Editing Template
Combination Definition	Setup Combination Definition
Combination Group	Setup Combination Group
Combination Rule	Setup Combination Rule

[Return to Administer Procurement](#)

Use this page to navigate to other pages and view and maintain accounting information for PeopleSoft eProcurement. You can record transactions in the general ledger and set up the different ChartField combinations that meet the needs of the business.

Enabling ChartField Security

PeopleSoft enables you to restrict access to your financial data within PeopleSoft eProcurement and across all PeopleSoft Financials Supply Chain Management (FSCM) applications. The ChartField Security feature prevents unauthorized employees and contractors from viewing and editing financial data. Other security features within PeopleSoft enable you to restrict access by business unit, ledger, SetID, paycycle, book code, and project ID; however, the ChartField Security feature enables you to restrict access to specific financial data by restricting access to a ChartField value or combination. Security by ChartField combination enables you to allow access to most financial data (such as inventory accounts or accounts payable balances) and still restrict access to sensitive data (such as executive salaries

or travel accounts). Using ChartField security, you can enable access to sensitive ChartField combinations by:

- User IDs
- User roles
- Permission lists

ChartField security is implemented at the component level. Occasionally there may be a component that is shared by two different products. PeopleSoft Purchasing and PeopleSoft eProcurement share components, such as the requisition component. In these cases, ChartField security must be implemented in both products in order to be active in either product.

The following methods can be used to enforce ChartField security:

- *Securing the prompt edit table values:* When a user clicks the prompt button or enters a value in a field containing a ChartField (Account, Department ID, and so on), then the system only displays values that the user is authorized to view.
- *Securing inquiry results list:* When a user is entering a component, the search results are limited to transactions containing ChartField combinations that the user is authorized to view.
- *Securing transactions from a component search list:* When a user is entering a component, the search results display all applicable transactions; however, if the user selects a transaction containing a restricted ChartField combination, then an error message is displayed and the user cannot access the transaction.
- *Securing drills to transaction component:* When a user is on the component, the search results display all applicable information; however, if the user selects a link to drill down into a more detailed page with restricted ChartField combination, then an error message is displayed and the user cannot access the additional information.

Based on the structure of the component, one or more of the above security methods can be implemented for a single component.

The following pages and components in PeopleSoft eProcurement can be restricted with ChartField security:

- Create Requisition component (securing the prompt edit table values). This component can also be accessed from the Manage Requisitions component.
- Approve Requisitions component (securing drills to transaction components).
- Approval Status component (securing drills to transaction components).
- Expedite Requisitions component (securing drills to transaction components).
- Requisition Schedule and Distribution component (securing drills to transaction components).
- Receive Items component (securing drills to transaction components).

Related Links

“Understanding ChartField Security” (Application Fundamentals)

Integrating With Oracle JD Edwards EnterpriseOne Procurement

PeopleSoft eProcurement can exchange data with Oracle JD Edwards EnterpriseOne Procurement (JD Edwards). You can use this integration to:

- Send purchase orders from PeopleSoft to Oracle JD Edwards EnterpriseOne.
- Send purchase order changes from PeopleSoft to Oracle JD Edwards EnterpriseOne.
- Send a purchase order hold status release message from Oracle JD Edwards EnterpriseOne to PeopleSoft .
- Notify Oracle JD Edwards EnterpriseOne of purchase orders dispatched from PeopleSoft
- Notify PeopleSoft of purchase orders dispatched from Oracle JD Edwards EnterpriseOne
- Send receipts from PeopleSoft to Oracle JD Edwards EnterpriseOne.
- Send receipts from Oracle JD Edwards EnterpriseOne to PeopleSoft .
- Send purchase order closes from Oracle JD Edwards EnterpriseOne to PeopleSoft .

To enable this integration, the PeopleSoft product uses EIPs (enterprise integration points) and the PeopleSoft Integration Broker. Oracle JD Edwards EnterpriseOne uses XPI Integration Server (IS) and XBPs, which include z-file interfaces, canonicals, and other Oracle JD Edwards EnterpriseOne integration points.

Before using these integration points, you must synchronize the master data between the two systems, such as item IDs, suppliers, and accounts.

Note: For complete information on the setup and use of this integration, see the "Integrating PeopleSoft eProcurement with Oracle JD Edwards EnterpriseOne Procurement" white paper located within the My Oracle Support website.

Pages Used to Integrate With Oracle JD Edwards EnterpriseOne Procurement

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Purchase Order EIP Page	SAC_INTG_R_CNTL	Enter criteria to launch the SAC_POEIPPUB process. This PeopleSoft Application Engine process is used to publish approved purchase orders created within the PeopleSoft system. This enables the purchase orders to be received by the Oracle JD Edwards EnterpriseOne system. eProcurement > Manage ERP Integration > Purchase Order EIP

Page Name	Definition Name	Usage
Voucher EIP Page	SAC_INV_R_CNTL	Enter criteria to launch the SAC_APEIPPUB process. This PeopleSoft Application Engine process is used to publish vouchers created within the PeopleSoft system. This enables the vouchers to be received by the Oracle JD Edwards EnterpriseOne system. eProcurement > Manage ERP Integration > Voucher EIP
Receipt EIP Page	SAC_RCPT_RUNCTL	Enter criteria to launch the SAC_RCPT_PUB process. This PeopleSoft Application Engine process is used to publish receipts created within the PeopleSoft system. This enables the receipts to be received by the Oracle JD Edwards EnterpriseOne system. eProcurement > Manage ERP Integration > Receipt EIP
External Invoices Page	SAC_INV_EXT	View external invoices. eProcurement > Manage ERP Integration > External Invoices
External Payments Page	SAC_PMT_EXT	View external payments. eProcurement > Manage ERP Integration > External Payments
External PO Error Acknowledge Page	SAC_POERR_NOTIFY	View the external purchase order acknowledgements (POAs) that are in error. eProcurement > Manage ERP Integration > External PO Error Acknowledge
External PO Status Page	SAC_ERP_PO_STS	View the status of external purchase orders. eProcurement > Manage ERP Integration > External PO Status
External Receiver Status Page	SAC_ERP_RECV_STS	View the status of external receipts. eProcurement > Manage ERP Integration > External Receiver Status

Determining Functional Implementation Options

Understanding eProcurement Functional Implementation Options

Use the eProcurement - Administer Procurement page to navigate to all necessary pages that you use to maintain procurement options. Every link that you need to set up and maintain procurement options can be located from this central navigational page.

Maintaining Business Units

To define business units, use the eProcurement Business Unit Actions component (PV_ACTIONS_BU), the eProcurement Business Unit Options component (PV_BUS_UNIT_PM), the Record Group component (REC_GROUP_TABLE), and the tableset ID component (SETID_TABLE).

PeopleSoft eProcurement requires a purchase order business unit because the system uses the business unit as a key field when recording transactions.

This section discusses how to create a PeopleSoft Purchasing business unit, create relationships between business units, SetIDs, and record groups, define PeopleSoft General Ledger business units, and define business unit options for PeopleSoft eProcurement.

Note: You can also access many of the pages that are listed in the Set Up Financials/Supply Chain menu within the Business Unit Related option.

Pages Used to Maintain Business Units

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Maintain Business Units Page	PV_ADM_SETUP_BU	View a list of links that you use to navigate to other pages to set up and maintain business unit information. eProcurement > Administer Procurement > Maintain Business Units
<u>Business Unit Definition Page</u>	BUS_UNIT_TBL_PM	Create a PeopleSoft Purchasing business unit.

Page Name	Definition Name	Usage
<u>eProcurement Business Unit Options Page</u>	BUS_UNIT_TBL_PM2	Define business unit options.
PO Approval Options (purchase order approval options) Page	BUS_UNIT_PO_APPR	Define purchase order approval options. Click the Purchasing Definition link on the Maintain Business Units page. Then select the PO Approval Options tab.
“Purchasing Definition - Document Numbering Page” (PeopleSoft Purchasing)	BUS_UNIT_TBL_PM3	View document numbering.
Record Group Page	REC_GROUP_TABLE	Add a record group. After adding the group, use the TableSet Control feature to create relationships. Click the Record Group link on the Maintain Business Units page.
<u>TableSet Control - Record Group Page</u>	SET_CNTRL_TABLE1	Group record definitions for the tables that you want to share, as well as any dependent record definitions. This creates relationships between SetIDs, business units, and record groups. <i>See PeopleTools: System and Server Administration.</i>
TableSet Control - Tree Page	SET_CNTRL_TABLE2	Associate the Set Control Value with trees. Click the TableSet Control link on the Maintain Business Units page. Then select the Tree tab.
TableSet ID - TableSet Control Page	SETID_TABLE	Use this page to create SetIDs. Click the TableSet ID link on the Maintain Business Units page.
AM Business Unit Definition (asset management business unit definition) Page	BUS_UNIT_TBL_AM	Create a PeopleSoft Asset Management business unit and specify its default processing options. Click the Asset Mgmt Definition (asset management definition) link on the Maintain Business Units page.
“Open Period Update Page” (Asset Lifecycle Management Fundamentals)	OPEN_PERIOD_SINGLE	Define in which periods transactions can be posted for Asset Management.

Page Name	Definition Name	Usage
Warehouse Mapping Page	AM_WAREHOUSE_MAP	Establish the default ChartField mapping rules that are necessary to accommodate asset-component changeout-transfers for this business unit. Click Warehouse Mapping on the AM Business Unit Definition page.
“VAT Defaults Setup Page” (Asset Lifecycle Management Fundamentals)	VAT_DEFAULTS_DTL	Setup defaults for VAT.
VAT Defaults Copy (value added tax Defaults Copy) Page	VAT_DFLT_SRCH_COPY	Copy VAT default specifications from another key combination for the same VAT driver. Click Copy Defaults From on the VAT Defaults Setup page.
“Business Unit/Book Definition Page” (Asset Lifecycle Management Fundamentals)	BU_BOOK_DEFN_01	Define required books, book options, and accounting entry options for each book that the business unit will use. You must first complete the AM Business Unit Definition page and define the asset books on the Asset Book page.
BU Book ChartFields Summarize Page	BU_BOOK_GRP_SUM	(Optional) Select the ChartFields that will be used to summarize assets by group member. - Click the Asset Mgmt Definition link on the Maintain Business Units page. - Select the Business Unit/Book Feature tab. - Select the Group Asset Processing check box on the Business Unit/Book Definition page.
“Round Options Page” (Asset Lifecycle Management Fundamentals)	ROUND_OPTIONS_SEC	(JPN) Select options for rounding depreciation amounts for the book.
“Depreciation Close List Page” (Asset Lifecycle Management Fundamentals)	MR_AM_DEPR_CLOS	Review the years and periods for which depreciation has been closed.

Page Name	Definition Name	Usage
<u>General Ledger - Definition Page</u>	BUS_UNIT_TBL_GL1 BUS_UNIT_TBL_GL2 BUS_UNIT_TBL_GL3 BUS_UNIT_TBL_GL4 BUS_UNIT_TBL_GL6	Define PeopleSoft General Ledger business units.
General Ledger - Currency Options Page	BUS_UNIT_TBL_GL3	Specify currency options at the business unit level for currency balancing, base currency adjustment, and the number of foreign currencies for each journal. Click the General Ledger Definition link on the Maintain Business Units page. Then select the Currency Options tab.
“Ledgers For A Unit - Currency Options Page” (PeopleSoft Global Options and Reports)	BUSINESS_UNIT_LED3	Indicate how you want to record adjusting entries for out-of-balance conditions that are caused by foreign currency rounding.
“Rounding Adjustment ChartFields Page” (PeopleSoft Global Options and Reports)	BUL_JE_RA_CFS_SEC	Specify ChartField options when an unbalanced condition exists between the debit and credit rows. This results when the system converts and then rounds a value from a foreign amount to a base amount.
Purchasing Processing Options Page	BUS_UNIT_OPT_PM	Define purchasing transaction processing criteria. Click the Processing Options link on the Maintain Business Units page.
“Dispatch Method Page” (PeopleSoft Purchasing)	BU_OPT_PM_DISP	Define transaction dispatch methods for purchase orders, request for quotes (RFQs), return to suppliers (RTVs), contracts, and replenishment requests.
“Freight Option Page” (PeopleSoft Purchasing)	BU_OPT_PM_FREIGHT	Define freight options, rule codes, and charge methods.
VAT Defaults Setup (value-added tax defaults setup) Page	VAT_DEFAULTS_DTL	Define VAT default options for all transactions in a business unit. Click the VAT Default link on the Purchasing Processing Options page.

Page Name	Definition Name	Usage
“Service VAT Treatment Defaults Setup (service value-added tax treatment defaults setup) Page” (PeopleSoft Purchasing)	VAT_DEFAULTS_DTL	Define service-related VAT default options for service transactions in a business unit.
“POA Settings (purchase order acknowledgements settings) Page” (PeopleSoft Purchasing)	POA_DEF_BU_SP	Define POA requirements and tolerance settings.
<u>eProcurement Business Unit Options Page</u>	PV_BUS_UNIT_PM	Define business unit options for PeopleSoft eProcurement.
eProcurement Business Unit Actions Page	PV_ACTIONS_BU	Identify the PeopleSoft eProcurement actions that should be used for each business unit. The applicable PeopleSoft eProcurement actions enable security for items from the business template, express forms, and direct connect suppliers. Click the eProcurement Business Unit Actions link on the Maintain Business Units page.

Business Unit Definition Page

Use the Business Unit Definition page (BUS_UNIT_TBL_PM) to create a PeopleSoft Purchasing business unit.

Navigation:

Click the **Purchasing Definition** link on the Maintain Business Units page.

This example illustrates the fields and controls on the Business Unit Definition page.

The screenshot displays the 'Business Unit Definition' page. At the top, there are five tabs: 'Business Unit Definition' (selected), 'Business Unit Options', 'PO Change Options', 'Req Change Options', and 'Document Numbering'. The main form area contains the following fields and controls:

- Unit:** US001
- Description:** US001 NEW YORK OPERATIONS
- Short Desc:** US001
- Process Option:** US001
- Location:** US001
- Billing Location:** US001
- Close Days:** (empty field)
- Cancel Days:** (empty field)
- Currency:** USD
- GL Unit:** US005 (with 'PS/GL' checkbox checked)
- AM Unit:** US001
- AP Unit:** US001
- SS Unit:** US001
- Rate Type:** CRRNT
- Capitalization:** 'Capitalize' checkbox checked
- Accrue SUT:** 'Accrue SUT for ERS orders' checkbox checked
- RFQ Required Rule:** (empty field)
- Line Amount Threshold:** (empty field) USD
- RFQ Required Rule:** (empty field)

At the bottom of the page, there are several links: 'Edit Comments', 'Matching', 'Define Dispatch Options', 'VAT Default', and 'Mobile Receiving'.

All PeopleSoft eProcurement transactions are recorded in a PeopleSoft Purchasing business unit. Set up a PeopleSoft Purchasing business unit even if you are not using PeopleSoft Purchasing (standalone mode).

Related Links

“Understanding Business Units in PeopleSoft Purchasing” (PeopleSoft Purchasing)

TableSet Control - Record Group Page

Use the TableSet Control - Record Group page (SET_CNTRL_TABLE1) to group record definitions for the tables that you want to share, as well as any dependent record definitions.

This creates relationships between SetIDs, business units, and record groups.

Navigation:

Click the **TableSet Control** link on the Maintain Business Units page.

This example illustrates the fields and controls on the TableSet Control - Record Group page.

Record Group Control Personalize | Find | View 100 | First 1-10 of 367 Last

Record Group ID	Description	*SetID	Short Description
AM_01	Agencies	SHARE	SHARE
AM_02	Book Definition	SHARE	SHARE
AM_03	Asset Property	SHARE	SHARE
AM_04	C.A.P. Types	SHARE	SHARE
AM_05	AM Indexes	SHARE	SHARE
AM_06	Units of Production Tables	SHARE	SHARE
AM_09	Depreciation Tables	SHARE	SHARE
AM_10	Accounting Entry Templates	SHARE	SHARE
AM_12	Repair/Service	SHARE	SHARE
AM_13	Maintenance Types	SHARE	SHARE

If you are integrating with a marketplace, use the TableSet Control - Record Group page to link the PeopleSoft eProcurement record group PV_01 as a marketplace buyer.

Note: Before altering this page, you should have a clear understanding of tablesets, record groups, and relational database concepts. Please see your database administrator before making changes.

Related Links

[Understanding the Integration Between a Marketplace and PeopleSoft eProcurement](#)

General Ledger - Definition Page

Use the General Ledger - Definition page (BUS_UNIT_TBL_GL1) to define PeopleSoft General Ledger business units.

Navigation:

Click the **General Ledger Definition** link on the Maintain Business Units page.

This example illustrates the fields and controls on the General Ledger - Definition page.

Definition	Journal Options	Currency Options	Approval Options	Inter/IntraUnit
Business Unit US001 Description US001 NEW YORK OPERATIONS *As of Date 01/01/1900 Short Desc US001 *Base Currency USD Holiday List New York & Massachusetts Location Code ☐ Customer Supplier Affiliate ☐ Enable Document Sequencing ☐ Consol - For Eliminations Only Business Unit ID Numbers ADB Incremental Calc Method Mandate ID by BU				

Set up a PeopleSoft General Ledger business unit even if you are not using the PeopleSoft General Ledger system.

eProcurement Business Unit Options Page

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

eProcurement Business Unit Options

Business Unit US001 US001 NEW YORK OPERATIONS

Requisition Options

☐ Enable Req Region Security
☒ Allow Req Change in Purchasing
☒ Allow Changes to Dispatched PO

Workflow Options

☐ Workflow Approval Required
☐ Resubmit Workflow for Quantity or Price Decrease

Item Source Option

Item Source Master Items Only

Requisition Cycle Options

☒ Show PO Acknowledgements Icon
☒ Show ASN Icon

Special Request Options

Default Category
 Default Unit of Measure

Integration Option

Integration Type
 PO ID Scheme

Integration Options

Personalize | Find | First 1 of 1 Last

	Integration Option	
1		

[Return to Maintain Business Unit](#)
[Return to Administer Procurement](#)

Field or Control	Description
Enable Req Region Security (enable requisition region security)	Select to indicate that requisitions for this business unit have regional security. This means that the result of an item search from a requisition displays only those items and suppliers that are relevant to the regions for a requester.

Field or Control	Description
Allow Req Change in Purchasing (allow requisition change in purchasing)	Select to indicate that you can change requisitions added in PeopleSoft eProcurement (that is, having a SYSTEM_SOURCE of EPO) using the PeopleSoft Purchasing components. A eProcurement requisition can be altered in PeopleSoft Purchasing; however, a requisition added in PeopleSoft Purchasing cannot be altered using PeopleSoft eProcurement components.
Allow Changes to Dispatched PO	Select to enable users to create a change request when the requisition line has been source to a purchase order and the purchase order has already been dispatched. This value is overridden by the same option on the linked supplier's Supplier Properties page (i.e. ALLOW_PO_CHNG = N). Deselect to prevent users from creating a change request when the purchase order has already been dispatched.
Workflow Approval Required	Select to indicate that requisitions and change requests for this business unit must go through the approval workflow framework before the requisition is set to the status of approved. If this same check box is selected on the PeopleSoft Purchasing business unit then the approval workflow framework is turned on for both Purchasing and eProcurement and this check box on this page is unavailable. Selecting the Workflow Approval Required check box on the eProcurement business unit but not the Purchasing business unit turns on the approval workflow framework only in PeopleSoft eProcurement; in this case, if you edit an eProcurement requisition within a Purchasing component, the approval process is not triggered. Keep in mind that a requisition added in PeopleSoft eProcurement can be changed using the PeopleSoft Purchasing components only if you have selected the Allow Req Change in Purchasing check box on this page. A requisition added in PeopleSoft Purchasing cannot be altered using PeopleSoft eProcurement components. See Understanding the Approval Framework.
Resubmit Workflow for Quantity or Price Decrease	Select this check box to require the approval of a change request with a decrease in item quantity or price. When a requisition is changed to increase the item quantity or price, the system automatically requires approval of the change request.
Item Source	Select the catalog source for this business unit. Items can come from the item master tables, the express catalog, or both. This field is available for selection when the Item Source Option on the eProcurement Installation Options page is set to <i>Master and Express Items</i> .

Field or Control	Description
Show PO Acknowledgements Icon (show purchase order acknowledgements icon)	Select to display the POA icon on the requisition cycle. This icon can be used to view a purchase order acknowledgement received from a supplier. The requisition cycle can be viewed on the Manage Requisitions page or the Requisition Cycle for: <requester> page.
Show ASN Icon (show advanced shipping notice icon)	Select to display the ASN icon on the requisition cycle. This icon can be used to view an advanced shipping notice (ASN) received from a supplier. The requisition cycle can be viewed on the Manage Requisitions page or the Requisition Cycle for: <requester> page.
Integration Type	Select the type of integration that you will be using. Examples are Oracle, PeopleSoft 8.4, and SAP.
PO ID Scheme (purchase order ID scheme)	Select the purchase order ID scheme that you will be using. Examples are PO ID - User Defined and PO ID by Business Unit.
Integration Option	Select an option to control how the business unit acts for requisitions. Values include: <i>Do Not Consolidate:</i> Select to have the system create all requisition lines for this business unit with the Do Not Consolidate field set to <i>Yes</i>. <i>External Invoices:</i> Select to indicate the requisition cycle sources invoice data from a set of staging tables that can be populated from an external accounting system. <i>External Payments:</i> Select to indicate the requisition cycle sources payment data from a set of staging tables that can be populated from an external accounting system. <i>External Receiving:</i> Select to indicate the requisition cycle sources receiving data from a set of staging tables that can be populated from an external system. <i>No Deletion After Integration:</i> Select to indicate that deletions will not occur after the integration processes are run. <i>One Distribution per Schedule:</i> Select to indicate that users cannot create requisitions with multiple distributions per schedule. <i>One Schedule per Line:</i> Select to indicate that users cannot create requisitions with multiple schedules per line. <i>PeopleSoft PO ID Used</i> (PeopleSoft purchase order ID used): Select to indicate that the external system will have the same purchase order ID as the PeopleSoft order when integrating with an external system.

Note: You can select more than one integration option by adding rows to the **Integration Options** group box.

Setting Up and Maintaining Codes

To set up and maintain codes, use these components:

- Carrier (CARRIER_TBL).
- Currency Code (CURRENCY_CD_TABLE)
- File Location (FILE_LOC_GBL)
- Freight Terms (FREIGHT_TERMS)
- Location Definition (LOCATION_TBL)
- Reason Code (REASON_CD)
- Ship To (SHIP_TO_CODES)
- Ship Via (SHIP_VIA_CD)
- State (STATE_DEFN)
- Standard Comment (STD_COMMENT_TYPE)
- Tax Authority (TAX_AUTHORITY)
- Tax Code (TAX_CODE)
- Unit of Measure (UNITS_OF_MEASURE)

This section provides an overview of purchasing codes and lists the pages used to set up and maintain codes.

Pages Used to Set Up and Maintain Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Maintain Codes Page	PV_ADM_SETUP_CODES	View a list of links that are used to navigate to other pages to set up and maintain purchasing codes. eProcurement > Administer Procurement > Maintain Codes
Carrier Page	CARRIER_TBL	Define the carriers that the organization uses to move freight. Click the Carrier link on the Maintain Codes page.

Page Name	Definition Name	Usage
Std Comm Type (Standard Comment Type) Page	STD_COMM_TYPE_PO	Define standard comment types to use to identify the purpose of a particular comment. Click the Comment Types link on the Maintain Codes page.
Standard Comments Page	STD_COMMENTS_PO	Create standard comments that can be assigned to a purchase order. Click the Comments link on the Maintain Codes page.
Commodity Code Page	COMMOD_CODE	Define commodity codes. Commodity codes, which are also called freight classes, are used on bills of lading to group and identify shipped products for freight rating and insurance purposes. Click the Commodity Codes link on the Maintain Codes page.
Country Description Page	COUNTRY_DEFN	Add or review country descriptions. Click the Countries link on the Maintain Codes page.
Address Format Page	ADDR_FORMAT_TABLE	Select address fields for a country so that the system displays addresses in the appropriate format. Click the Countries link on the Maintain Codes page. Then select the Address Format tab.
Currency Code Page	CURRENCY_CD_TABLE	Define the currencies that you will be using in the eProcurement application. Click the Currency Codes link on the Maintain Codes page.
File Locations Page	FILE_DIR_FS	Define file extensions that you want the system to recognize, system locations for transaction attachments, email and fax file extensions, and file server directories. Click the File Locations link on the Maintain Codes page.

Page Name	Definition Name	Usage
Freight Terms Page	FREIGHT_TERMS	Set up freight terms. Click the Freight Terms link on the Maintain Codes page.
Location Definition Page	LOCATION_TBL	Define a location code, such as a branch office or shipping office. Click the Location Codes link on the Maintain Codes page.
Location Detail Page	LOCATION_TBL2	Add details to a location definition. Click the Location Codes link on the Maintain Codes page. Then select the Location Details tab.
Reason Codes Page	REASON_CD	Define reason codes, which provide explanations for occurrences such as returned stock and changes to order headers, lines, or schedules. For example, you might set up a reason code called CUST-CA for orders that have been canceled at the customer's request. You can also define return and reject reason codes for items that are received in PeopleSoft Purchasing. Click the Reason Codes link on the Maintain Codes page.
Ship To Locations Page	SHIPTO_HDR	Associate the sourcing region with the appropriate ship to location. Click the Ship To Locations link on the Maintain Codes page.
Sales Use Tax Page	SUT_DFLT_TBL	Enter default sales and use tax information for each ship to location. The sales and use tax rates are normally based on the final destination of the shipment (the ship to location). Click the Ship To Locations link on the Maintain Codes page. Then click the Sales/Use Tax link.

Page Name	Definition Name	Usage
Ship To Supplier Order Location Page	SHIPTO_VNDR_LOC	Associate ship to supplier locations with the supplier order locations, SetIDs, and supplier ID. Click the Ship To Locations link on the Maintain Codes page. Then click the Supplier Order Location link.
Ship Via Codes Page	SHIP_VIA_CD	Set up shipping codes. Click the Shipping Methods link on the Maintain Codes page.
States Page	STATE_DEFN	Add or review a state or province codes. Click the States link on the Maintain Codes page.
Tax Authorities Page	TAX_AUTHORITY	Add to or update sales and use tax authorities. Click the Tax Authorities link on the Maintain Codes page.
Tax Codes Page	TAX_CODE	Add or update sales and use tax codes. Click the Tax Codes link on the Maintain Codes page.
Units of Measure Page	UNITS_OF_MEASURE	Establish units of measure for the resources. Click the Units of Measure link on the Maintain Codes page.

Understanding Purchasing Codes

Purchasing codes control information that is used during the purchasing process. Examples of these codes include carrier, currency, and commodity codes, as well as freight, location, and tax codes.

If you are using supplier integration, be sure that the country, currency, and units of measure codes that you define are the same as those that appear on the supplier's website. Use International Organization for Standardization (ISO) standards.

Note: You can also access many of the pages that are listed in the following table by selecting **Setup Financials/Supply Chain > Common Definitions** and **Setup Financials/Supply Chain > Product Related**.

Maintaining Suppliers

To maintain suppliers, use the Maintain Supplier URLs (PV_VNDR_URL_MAINT), Procurement Card Issuers (CC_CARD_TBL), Supplier Control (VENDOR_CONTROL), and Supplier Information (VNDR_ID) components.

This section discusses how to enter URLs for supplier websites.

Pages Used to Maintain Suppliers

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Maintain Suppliers Page	PV_ADM_VNDR	Access the pages that you use to maintain suppliers. eProcurement > Administer Procurement > Maintain Suppliers
<u>Maintain Supplier Hyperlinks Page</u>	PV_VNDR_URL_MAINT	Enter URLs for supplier websites. Click the Supplier link on the Item Description page to access that supplier's website.
Card Issuer Page	CC_CARD_TBL	Set up a procurement card supplier that is associated with a PeopleSoft Payables supplier. Click the Procurement Card Issuers link on the Maintain Suppliers page.
Supplier Set Control Page	VNDR_CNTRL	Set up supplier control data, such as auto numbering, VAT information, wait days, and duplicate supplier checking. Click the Supplier Control link on the Maintain Suppliers page.
Summary Page	VNDR_ID1_SUM	View summary information about a supplier, including who created the supplier, when the record was last modified, and by whom. This page appears only after you have saved a supplier. Click the Supplier Information link on the Maintain Suppliers page.

Page Name	Definition Name	Usage
Identifying Information Page	VNDR_ID1	Enter identifying information for a supplier, including the supplier name and short name, classification, status, persistence, withholding and VAT eligibility, relationships with other suppliers, setting to check for duplicate invoices, and additional identifying elements that are required for reporting to government agencies. Click the Supplier Information link on the Maintain Suppliers page. Then select the Identifying Information tab.
VAT Registration Details (value-added tax registration details) Page	VNDR_VAT_RGSTRN	Specify VAT registration information for all the countries with which the supplier is registered to do business. Click the Registration link on the Identifying Information page.
VAT Defaults Setup (value-added tax defaults setup) Page	VAT_DEFAULTS_DTL	Specify and review VAT default settings at the supplier level. Click the VAT Default link on the Identifying Information page.
Service VAT Treatment Default Setup (service value-added tax treatment default setup) Page	VAT_DEFAULTS_DTL	Specify and review VAT default settings for VAT on services at the supplier level. Click the VAT Service Treatment Setup link on the Identifying Information page.
General Information - General Info Page	CUST_GENERAL1	Define bill to-customer information. The Bill to Customer Details link is available only if you can automatically create bill to customers from the Supplier component. Click the Bill To Customer Details link on the Identifying Information page.
Supplier User Page	VENDOR_USER	Identify users who are authorized to access supplier information. Suppliers > Supplier Information > Add/Update > Supplier User

Related Links

“Defining Procurement Card Mapping” (PeopleSoft Purchasing)

“Entering Supplier Identifying Information” (PeopleSoft Source to Settle Common Information)

Maintain Supplier Hyperlinks Page

Use the Maintain Supplier Hyperlinks page (PV_VNDR_URL_MAINT) to enter URLs for supplier websites.

Navigation:

eProcurement > **Administer Procurement** > **Maintain Suppliers**. Click the **Maintain Supplier URLs** link on the Maintain Suppliers page.

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

SetID	Supplier ID	Supplier Name	Supplier Home Page
1 SHARE			

To enter the URL for a supplier's website:

1. Click the **Update Supplier List** button to display the suppliers within the designated SetID.
This button disappears after the suppliers appear.
2. In the **Supplier Home Page** field, enter the URL for the supplier.
3. Click the **Save** button to save the work.
4. Click the **Supplier** link on the Search Catalog page to access the supplier's website.

Related Links

“Entering Supplier Identifying Information” (PeopleSoft Source to Settle Common Information)

Maintaining Items

This section provides an overview of item maintenance and lists the pages used to maintain items.

Pages Used to Maintain Items

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Maintain Items Page	PV_ADM_DEFINE_ITEM	View links to navigate to pages to maintain items. Access is limited to users with the SYSTEM_ADMIN action role. eProcurement > Administer Procurement > Maintain Items
Assign Catalogs to Business Unit Page	PV_REQ_BU_CAT	Assign one or multiple item catalogs to a business unit. Click the Assign Catalog to BU link on the Maintain Items page.
Item Categories - Category Definition Page	CATEGORY_TBL	Define item categories. Click the Item Categories link on the Maintain Items page.
Update Catalog Tree Page	CAT_PNLS_CATLG_SEC	Select the catalog tree to update with new category code information. - From the Item Categories - Category Definition page, change item categories or add a new item category and then click Save. - From the Item Categories - Category Definition page, click the Yes button when asked if you want to update catalogs with the category changes.
BU Specific Attributes (business unit specific attributes) Page	ITM_CAT_BU_SEC	Assign a buyer to this category for each business unit. You may want to do this if you order by description and want a default buyer for this category by business unit. This setup is optional. The system uses the values that are set up for the buyer at the item category level for all business units that are not specified here. Click the BU Attributes (business unit attributes) link on the Item Categories - Category Definition page.

Page Name	Definition Name	Usage
View Catalog Hierarchy Page	CAT_PARENTAGE_SEC	View information about where a category resides in the entire catalog tree hierarchy. Click the Hierarchy link on Item Categories - Category Definition page.
Item Categories - Category Definition 2 Page	CATEGORY_TBL2	Define the matching and receiving controls, sourcing controls, and miscellaneous controls and options for the category. Also use this page to set price tolerance defaults for items to trigger workflow exception notifications. PeopleSoft Purchasing and PeopleSoft Payables use matching controls to match receipts, purchase orders, and vouchers. Receiving controls specify how receiving users process items that are assigned to this category. These values become a part of the item default hierarchy and can be displayed in purchase order lines where this category is specified. Click the Item Categories link on the Maintain Items page. Then select the Category Definition 2 tab.
Supplier Sourcing Priorities Page	ITM_CAT_VND_PR_SEC	Set the supplier priority and split sourcing allocation percentage for suppliers for this category. Click the Priorities link on the Item Categories - Category Definition 2 page.
Item Families Page	PROD_FAMILY_INV	Establish item family options. Click the Item Families link on the Maintain Items page.
Item Groups Page	INV_ITEM_GROUP	Group similar items together. Click the Item Groups link on the Maintain Items page.

Page Name	Definition Name	Usage
Item Number Control Page	ITEM_NBR_CONTROL	Define whether new inventory items are sequentially numbered or manually numbered. Click the Item Numbering Control link on the Maintain Items page.
Manufacturers Page	MANUFACTURER	Select a default universal item ID for a manufacturer, and determine whether the manufacturer is locally owned. Click the Manufacturers link on the Maintain Items page.
Item Approval Page	INV_ITEM_APPROVAL	Manually approve item definitions that you create at the SetID level. Click the Item Approval link on the Maintain Items page.
Define Item - General: Common Page	INV_ITEMS_DEFIN1	Define an inventory item at the SetID level. Click the Item Definition link on the Maintain Items page.
Define Item - Item Image Page	INV_ITEM_IMAGE_SEC	Maintain an image of an item. Click the Item Image link on the Define Item - General: Common page.
Define Item - Manufacturer's Item Page	ITM_MFG_SP	Define information about the manufacturer of the item. Click the Manufacturers link on the Define Item - General: Common page.
Define Item - General: Classifications Page	INV_ITEMS_DEFIN4	Continue defining attributes for the item. Click the Classifications link on the Define Item - General: Common page.
Define Item - General: Dimensions Page	INV_ITEMS_DEFIN3	Track the item's dimensions, size, and color. Click the Dimensions link on the Define Item - General: Common page.

Page Name	Definition Name	Usage
Define Item - General: Usage Page	INV_ITEMS_DEFIN8	Define material usage attributes for an item at the SetID level. Click the Usage link on the Define Item - General: Common page.
Define Item - Inventory: Tracking/Description Page	INV_ITEMS_DEFIN2	Establish or maintain item descriptions and lot-control attributes. Access the pages in the Define Item component, and then select the Inventory tab.
Define Item - Inventory: Shipping/Handling Page	INV_ITEMS_DEFIN5	Establish or maintain shipping and handling attributes. Click the Shipping/Handling link on the Define Item - Inventory: Tracking/Description page.
Define Item - Substitutes Page	INV_ITEMS_DEFIN7	Establish or maintain substitute items. Access the pages in the Define Item component, and then select the Substitutes tab.
Define Item - Configuration Page	INV_ITEMS_DEFIN6	Define item-distribution and production-configuration attributes if you are using PeopleSoft Product Configurator. Access the pages in the Define Item component, and then select the Configuration tab.
Define Item - Custom: Character Page	INV_ITEMS_DEFIN9	Define alphanumeric field values at the SetID level for item attributes that are unique to the enterprise. Access the pages in the Define Item component, and then select the Custom tab.
Define Item - Custom: Numeric Page	INV_ITEMS_DEFIN10	Define numeric field values at the SetID level for item attributes that are unique to the enterprise. Click the Numeric link on the Define Item - Custom: Character page.

Page Name	Definition Name	Usage
Units of Measure Page	INV_ITEM_UOM	Assign a unit of measure (UOM) to an item. For each item-UOM combination that you define, specify quantity precision and rounding rules for use in system calculation. Click the Item Units of Measure link on the Maintain Items page.
UOM Weight/Volume (unit of measure weight and volume) Page	INV_ITEM_WTVOL	Assign default packing codes and stocking and shipping physical measurements to an item-UOM combination. Click the UOM Weight/Volume link on the Units of Measure page.
Global Trade Item Numbers Page	ITM_MFG_GTIN_SP	Assign a GTIN to the item-UOM combination using a locally owned EAN/UCC Company Prefix (manufacturer). Click the Global Trade Item Number link on the Units of Measure page.
Price Adjustment Page	PRICE_ADJUSTMENT	Define the rules that the system should follow when calculating the supplier-adjusted price from the supplier's base price. You can define effective-dated adjustment rule sequences for each item-supplier combination. Click the Price Adjustment link on the Maintain Items page.
Price Adjustment Details Page	PRICE_ADJUST_DTLS	Define the quantities and adjustment methods for each of the price adjustment rules. Access the pages in the Price Adjustment component, and then select the Price Adjustment Details tab.
Purchasing Attributes Page	ITM_TBL_PUR	Enter basic purchasing information for an item. Click the Purchasing Attributes link on the Maintain Items page.

Page Name	Definition Name	Usage
Item Specifications Page	ITEM_SPEX_PUR	Record standard details about the item. You can send these specifications to the supplier using the purchase order. Click the Item Specifications link on the Purchasing Attributes page.
Packing Details Page	ITM_PKG_PUR_SEC ITM_VUOM_PKG_SEC	Enter packing volume and weight information for the item. When accessed from the Supplier's UOM and Pricing Info (supplier's unit of measure and pricing information) page, the Packing Details page also enables you to define item package dimensions, which can be useful if item package dimensions vary by supplier. Click the Packing Details link on the Purchasing Attributes page.
VAT Defaults Setup (value-added tax defaults setup) Page	VAT_DEFAULTS_DTL	Enter VAT defaults for this item into the VAT hierarchy tables. Click the VAT Default link on either the Purchasing Attributes page or the Purchasing Business Unit Attributes page.
VAT Service Treatment (value-added tax service treatment) Page	VAT_DEFAULTS_DTL	Enter service-related VAT defaults for this item into the VAT hierarchy tables. Click the VAT Service Treatment Setup link on either the Purchasing Attributes page or the Purchasing Business Unit Attributes page.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Purchasing Attributes - Purchasing Controls Page	ITM_TBL_PUR2	Specify matching and receiving defaults for the item. Define sourcing controls and miscellaneous controls and options for the item. Set price tolerance defaults for purchased items. These tolerances are populated based on the category of the item. You can override them during online item setup. Use these tolerances in conjunction with the price-change exception-rule. Item Load processes compare new item and supplier prices in the Item Loader staging table to the previous item and supplier price. If the new price exceeds tolerances, the system generates an exception. Access the pages in the Purchasing Attributes component, and then select the Purchasing Controls tab.

Page Name	Definition Name	Usage
Purchasing Business Unit Attributes Page	ITM_BU_PUR	Define item attributes by business unit. If you do not specify tolerance values for the business unit, the system uses tolerance values that are defined for the purchasing attributes of the item. When you access this page to specify business-unit specific attributes, tolerance values are derived from the purchasing attributes of the item. To define zero tolerances on this page, you must clear the tolerance fields manually. If you access this page and enter a business unit, but do not enter any values and click OK to quit the page, the system uses tolerance values from the purchasing attributes to create business-unit specific values. Click Cancel instead to avoid this situation. The fields on this page match those on the Purchasing Attributes page and on the Purchasing Definition - Business Unit Options page. This page is not available unless at least one of the PeopleSoft Purchasing business units has the Allow Business Item Attributes option selected on the Purchasing Definition - Business Unit Options page. Click the BU Attributes (business unit attributes) link on the Purchasing Attributes - Purchasing Controls page.
Purchasing Attributes - Item Supplier Page	ITM_VENDOR	Establish and update prioritized item-supplier combinations. Access the pages in the Purchasing Attributes component, and then select the Item Supplier tab.
Supplier Search Page	VENDOR_LOOKUP_SEC	Search for suppliers. Click the Supplier Lookup link on the Purchasing Attributes - Item Supplier page.

Page Name	Definition Name	Usage
Supplier's UOM and Pricing Info (supplier's unit of measure and pricing information) Page	ITM_VENDOR_UOM	Establish valid units of measure to use when ordering the item from the supplier and to establish the pricing information for each valid UOM. Click the Item Supplier UOM (item supplier unit of measure) link on the Purchasing Attributes - Item Supplier page.
Effective Dated UOM (effective dated unit of measure) Page	ITM_VNDR_UOMCHG	Enter effective-dated conversion rate changes along with the packing detail information. Click the Effective Dated UOM link on the Supplier's UOM and Pricing Info page.
Update Purchase Order Page	PO_EDUOM_UPDPO_SEC	Update existing purchase order schedules with the new effective-dated UOM conversion rate changes. Click the Update PO link on the Supplier's UOM and Pricing Info page or the Effective Dated UOM page.
Maintain Purchase Order - Purchase Order Page	PO_LINE	Maintain the purchase order and all of its details. Click the PO Number link on the Update Purchase Order page.
Supplier's Manufacturer Info (supplier's manufacturer information) Page	ITM_VENDOR_MFG	Record the authorized manufacturers for an item-supplier combination. Click the Supplier Item MFG (supplier item manufacturer) link, on the Purchasing Attributes - Item Supplier page.
Supplier Item Return Fees Page	ITM_VND_RTV_FEE	Add fees that were charged by the supplier for returning this item. Click the Return to Supplier Fees link on the Purchasing Attributes - Item Supplier page.
Item Supplier Contracts Page	ITM_VNDR_CNTRCT	View all contracts for any specified item and supplier combination. Click the Item Supplier Contracts link on the Purchasing Attributes - Item Supplier page.

Page Name	Definition Name	Usage
Purchasing Kit Definition Page	PURCH_KIT_TBL	Define purchasing kits. Click the Purchasing Kits link on the Maintain Items page.
eProcurement New Item Request Page	PV_ITEM_REQUEST	Approve or deny a new item request. To add and approve a new item request, indicate the SetID and item ID, and click the Create Item Notification button. Click the eProcurement New Item Request link on the Maintain Items page.

Understanding Item Maintenance

You can establish the items that are used on PeopleSoft eProcurement requisitions, purchase orders, and other transactions. You can also perform these tasks:

- Assign one or multiple item catalogs to a business unit.
- Define item categories and purchasing attributes, such as primary buyer, receiving controls, and price tolerances.
- Define item families.
- Define item groups.
- Set up item number control, which enables the system to assign sequential item IDs.
- Add and maintain manufacturer information about an item.
- Approve new items and define their definitions, their units of measure, and their ship to locations.
- Maintain item prices and their purchasing attributes.
- Set up purchasing kits for items.

Note: You can access many of the pages that are listed in the table by selecting **Items > Define Controls** and **Items > Define Items and Attributes**.

Maintaining Catalogs

This section provides an overview of item catalogs and discusses how to maintain catalogs.

Page Used to Maintain Catalogs

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Maintaining Catalogs Page</u>	PV_ADM_CATALOGS	Maintain catalogs by adding security and catalog types. Access is limited to users with the SYSTEM_ADMIN action role.

Understanding Item Catalogs

Item catalogs control the items that are available to users when they are creating requisitions. Using the Maintain Catalog feature, you can:

- Define the catalog security implementation to use for PeopleSoft eProcurement requisitions.
- Define catalog types, such as item catalogs, templates, express forms, and direct connect suppliers.
- Set up catalog security types, including attributes and default information for the type.
- Grant different catalog type access for different security types.

Maintaining Catalogs Page

Use the Maintain Catalogs page (PV_ADM_CATALOGS) to maintain catalogs by adding security and catalog types.

Access is limited to users with the SYSTEM_ADMIN action role.

Navigation:

eProcurement > Administer Procurement > Maintain Catalogs

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

Maintain Catalogs

Catalog Security	
Menu	Description
eProcurement Catalog Security Option	Define the catalog security implementation to use for eProcurement requisitions.
Catalog Types	Define Catalog Types, e.g. Item Catalogs, Templates, Direct Connect Suppliers, etc.
Catalog Security Types	Define Catalog Security Types.
eProcurement Business Unit Actions	Assign eProcurement Action to Business Units

Item Region Security	
Menu	Description
eProcurement Business Unit Options	Maintain eProcurement Business Unit Options
Item Supplier By Region	Define priority suppliers by item regions.
Purchasing Attributes	Define item information specific to purchasing such as preferred supplier, price, receiving instructions, etc.

[Return to Administer Procurement](#)

Use the links on this page to navigate to other pages where you can add security and catalog types to the Customer Relationship Management (CRM) application.

Setting Up Profiles

This section discusses how to manage personal templates for a profile, copy a personal template for a profile, manage favorites group for a profile, and copy a favorites group for a profile.

Pages Used to Set Up Profiles

Page Name	Definition Name	Usage
My Profile Page	PV_ADM_MY_PROFILE	Define information about users, including email addresses, passwords, alternate IDs, and preferred languages.

Page Name	Definition Name	Usage
<u>Manage Personal Templates Page</u>	PV_REQ_TEMP_MGR	Add item templates to the user, allow the templates to be shared with other roles and users, view the item details within each template, and copy templates that are created by other users.
<u>Copy a Personal Template(s) Page</u>	PV_REQ_TEMPL_COPY	Copy personal templates for a profile.
Request Procurement Card Page	PV_CC_REQUEST	Define user information for a procurement card. The information includes amount and transaction limits.
<u>Manage Favorites Groups Page</u>	PV_REQ_FAV_GRP	Add favorite groups to the user, allow the favorites groups to be shared with other roles and users, view the item details within each favorite group, and copy favorite groups that are created by other users.
<u>Copy a Favorites Group Page</u>	PV_REQ_GRP_COPY	Copy favorites groups for a profile.

Manage Personal Templates Page

Use the Manage Personal Templates page (PV_REQ_TEMP_MGR) to add item templates to the user, allow the templates to be shared with other roles and users, view the item details within each template, and copy templates that are created by other users.

Navigation:

eProcurement > My Profile

Click the **Manage Personal Templates** link.

See Creating Requisitions.

Field or Control	Description
Allow Sharing	Select to indicate that this template can be copied by other roles and users. If not selected, the template cannot be copied.
Share Details	Click to access the Share Details page. Select Share with All Roles and Requesters to share this template, or select specific roles and requesters to specify only the individuals who can share the template.
View Details	Click to access the View Details page, which lists the items in the template. Items can be removed from this page, but they cannot be added.

<i>Field or Control</i>	<i>Description</i>
Copy a Personal Template	Click to access the Copy a Personal Template page, which enables you to copy a template that is shared by other requesters.

Copy a Personal Template(s) Page

Use the Copy a Personal Template(s) page (PV_REQ_TEMPL_COPY) to copy personal templates for a profile.

Navigation:

eProcurement > My Profile

Click the **Manage Personal Templates** link.

Click the **Copy a Personal Template** link.

Source Template

<i>Field or Control</i>	<i>Description</i>
Requester	Select a requester who has granted you access on the Share Details page for the template.
Template Name	Select a template that a requester has granted you access.

Target Template

<i>Field or Control</i>	<i>Description</i>
Template Name	Enter a template that will be used for the profile. Press the Tab key after completing this field.
Description	Enter a description that will be used for the profile. This field appears after you tab out of the Template Name field.
Copy to Target Template	Click to copy the items that are selected from the Source Template section to the Target Template section.

Manage Favorites Groups Page

Use the Manage Favorites Groups page (PV_REQ_FAV_GRP) to add favorite groups to the user, allow the favorites groups to be shared with other roles and users, view the item details within each favorite group, and copy favorite groups that are created by other users.

Navigation:

eProcurement > My Profile

Click the **Manage Favorites Groups** link.

See [Create Requisition — Favorites Page](#).

See [Create Requisition Page](#).

<i>Field or Control</i>	<i>Description</i>
Allow Sharing	Select to indicate that this favorites group can be copied by other roles and users. If this option is not selected, the favorites group cannot be copied.
Share Details	Click to access the Share Details page. Select Share with All Roles and Requesters to share this favorites group, or select specific roles and requesters to specify only the individuals who can share the favorites group.
View Details	Click to access the View Details page, which lists the items in the group. Items can be removed from this page, but they cannot be added.
Copy a Favorites Group	Click to access the Copy a Favorites Group page, which enables you to copy favorites groups that are shared by other requesters.

Copy a Favorites Group Page

Use the Copy a Favorites Group page (PV_REQ_GRP_COPY) to copy favorites groups for a profile.

Navigation:

eProcurement > My Profile

Click the **Manage Favorites Groups** link.

Click the **Copy a Favorites Group** link.

Source Favorites Group

<i>Field or Control</i>	<i>Description</i>
Requester	Select a requester who has granted you access on the Share Details page for the Favorites Group.
Group Name	Select a favorites group that a requester has granted you access.

Target Favorites Group

<i>Field or Control</i>	<i>Description</i>
Group Name	Enter a name that will be used for the profile. Press the Tab key after completing this field.
Description	Enter a description that will be used for the profile. This field appears after you tab out of the Group Name field.
Copy to Target Group	Click to copy the items that are selected from the Source Favorites Group section to the Target Favorites Group section.

Setting Up and Maintaining Users

To set up and maintain users, use the Procurement component (PV_OPR_DEFAULT).

This section discusses how to define user preferences in PeopleSoft eProcurement.

Pages Used to Set Up and Maintain Users in PeopleSoft eProcurement

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Maintain Procurement Users Page	PV_ADM_PROCU_USERS	Use this page to set up and maintain users in PeopleSoft eProcurement (buyers, employee profiles, requesters, and user preferences). Access is limited to users with the SYSTEM_ADMIN action role. eProcurement > Administer Procurement > Maintain Procurement Users

Page Name	Definition Name	Usage
<u>Procurement Page</u>	OPR_DEF_TABLE_PM1	Define user preferences for PeopleSoft eProcurement.

Procurement Page

Use the Procurement page (OPR_DEF_TABLE_PM1) to define user preferences for PeopleSoft eProcurement.

Navigation:

Click the **User Preferences** link on the Maintain Procurement Users page. Then click the **Procurement** link.

This example illustrates the fields and controls on the Procurement page.

The screenshot shows the 'Procurement' page with the following fields and values:

- User: VP1
- Location: US001 (USA - New York)
- Origin: ONL (Online Entry)
- Department: 10000 (Human Resources)
- Ship To Location: US001 (USA - New York)
- Requester: VP1 (Kenneth Schumacher)
- Buyer: VP1 (Kenneth Schumacher)

Default Operator: Kenneth Schumacher

Links at the bottom:

- Contract Process
- Payables Online Vouchering
- Purchase Order Authorizations
- Supplier Onboarding
- Rebate Authorizations
- Receiver / RTV Setup
- Supplier Processing Authority
- Request for Quote Process
- Requisition Authorizations
- Doc Tolerance Authorizations

Use this page to enter the user preferences for the user's location, origin, department, and ship to location. You can also enter the requester and buyer that is most often associated with the user.

Related Links

“Understanding User Preferences” (Application Fundamentals)

Chapter 5

Importing and Searching Supplier Catalogs

Understanding Supplier Data

Supplier data includes the catalogs and items that you load into the PeopleSoft eProcurement system for use in creating requisitions and purchase orders. A catalog management system manages the supplier data by importing it from multiple suppliers or trading partners. This topic discusses the PeopleSoft eProcurement components that make it possible to import, load, search, and secure item catalogs that you use in purchasing activities.

You set up these components using the Administer Procurement Main page. You also work with supplier data using the Direct Connect Supplier feature.

Related Links

[Understanding the Integration Between a Marketplace and PeopleSoft eProcurement](#)

[Understanding Direct Connect Supplier Integration](#)

Loading Catalogs into PeopleSoft eProcurement

This section provides an overview of PeopleSoft eProcurement catalogs and discusses how to import procurement catalogs, enter item defaults, and validate and process imported items.

Pages Used to Load Catalogs into PeopleSoft eProcurement

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Procurement Catalog Load Page	PV_CP_IMPORT_RUN	Import procurement catalogs.
Items Defaults Page	PV_CP_RUN_DEFAULTS	Enter items defaults.
Validate and Process Imported Items Page	PV_CP_PROCESS	Validate and process imported items.
Item Supplier page	ITM_VENDOR	View and edit item supplier requirements.
Linked Suppliers Page	PV_MS_SEC_SUPPLIER	Create a relationship between the supplier ID and the partner ID.

Understanding PeopleSoft eProcurement Catalogs

With this integration, you can move item catalogs and category hierarchies to PeopleSoft eProcurement. These items can then be entered on eProcurement requisitions and purchase orders. After you load the items, you should schedule regular updates to capture changes such as price changes, discontinuation of items, or the addition of new items.

Take these details into consideration before integrating with a catalog management system:

- The catalog SetID maps to the item SetID.

Therefore, the SetID for the catalog must be the same as the SetID for the Item Master table.

- All hierarchies can be moved to eProcurement independent of the items.

This enables you to update attributes for categories before loading the items.

- During the load, the system creates a tree if it doesn't already exist.
- During the load, you have the option of creating the hierarchy ID as a node or to not have the hierarchy ID as a node in the tree selected.
- The only restriction with hierarchies is that the category can only exist once in the hierarchy.

If two are found when loading hierarchies to eProcurement, the node only shows up once.

- When loading the tree, the categories are created.
- Trading partners that are not associated with a supplier must be set up using the Link Suppliers page.
- When using PeopleSoft Catalog Management to do mappings, do not assign a value to the **Item ID** field.

This enables Catalog Management to assign an ID that is automatically generated.

- When loading the items, you have an option in the Import Item Catalogs page to run all the processes.

To do this, you have to specify the account and currency code. If not, access the Validate Items page to specify the account and continue with the load process.

Loading Catalog Management Catalogs into PeopleSoft eProcurement

PeopleSoft Catalog Management is used to aggregate several supplier catalogs for a requester to browse.

1. Create trading partner IDs.
2. Create an enterprise catalog.
3. Associate partner to the enterprise catalog.
4. Link the trading partner ID to suppliers using the Linked Supplier page.
5. Import the supplier catalog using the Procurement Catalog Load page.

Procurement Catalog Load Page

Use the Procurement Catalog Load page (PV_CP_IMPORT_RUN) to import procurement catalogs.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Import Item Catalog File

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

The screenshot displays the 'Procurement Catalog Load' page with the following elements:

- Page Header:** 'Procurement Catalog Load' and 'Item Defaults' tabs.
- Navigation Links:** 'Run Control ID', 'IMPORT', 'Report Manager', 'Process Monitor', and a 'Run' button.
- *Source:** A dropdown menu set to 'Catalog Management'.
- Import Catalog Items Section:**
 - *Item SetID (text field with search icon)
 - *Supplier SetID (text field with search icon)
 - *Supplier ID (text field with search icon)
 - *Supp Loc (text field with search icon)
 - *Catalog ID (text field with search icon)
 - *Hierarchy ID (text field with search icon)
- Options Section:**
 - ☒ Run Item Load
 - ☐ Import categories only
 - ☐ Index Items
 - ☐ Process by date/time
 - ☒ Add Hierarchy ID as Node
 - *Tree Name (text field with search icon)
 - Language (dropdown menu set to 'ENG' with search icon)
 - *Inactive level (dropdown menu set to 'Item Supplier Price')
- Footer Links:** 'Process Imported Items' and 'Return to Administer Procurement'.

Note: The source that you select determines which import data fields and options are required for this page. A variety of different fields appear on the page based on the selection.

Field or Control	Description
Source	Select the Catalog source. The system includes all attributes available for the Catalog integration. Sources include: • <i>CUP File (Access Database).</i> See Loading Marketplace Catalog Items into PeopleSoft eProcurement. • <i>Catalog Management.</i> • <i>Express Catalog.</i> Use this source to load express items into the master item tables. Note: Express Catalogs will only appear in the list if you have express catalogs turned on at the eProcurement Installation Options page. See Setting Up and Using the Express Catalog. • <i>Item PriceList.</i> • <i>xCBL 3.0XML File.</i> Note: Express Catalogs can only be created from a CUP file using the source of <i>CUP File (Access Database)</i> or <i>xCBL 3.0XML File</i>. Express items cannot be created using the sources of <i>Catalog Management</i>, <i>Item PriceList</i>, or <i>Express Catalog</i>.
Item SetID	Map to the SetID for the catalog that you are importing. If you are loading items, select the item SetID and supplier SetID for the catalog.
Supplier SetID	Limits the import to certain suppliers, based on their SetID.
Supplier ID	Limits the import to certain suppliers, based on their ID.
Supplier Loc	Limits the import to a specific supplier location.
Catalog ID	Select a catalog upon which to base the import.
Hierarchy ID	Select a hierarchy upon which to base the import associated with the enterprise catalog.

Field or Control	Description
Product File, Attachment File, and Price File	If you select the value of CUP file (Access database) for the Source field on this page, then use these fields to enter the directory path and file name of the product, attachment, and price files. These flat files are created as per the required format.
Run Item Load	Enables you to run all load processes required to create the items. This option is only available when the Import Categories Only check box is not selected. If you don't select this option, click the Process Imported Items link to validate the items.
Import Categories Only	If you select the value of <i>Catalog Management</i> for the Source field on this page, then you can use this check box to select only the categories associated with the hierarchy ID. This creates the categories and populates the tree specified. Note: If you are only importing categories, the system makes the supplier SetID and the supplier ID unavailable.
Purchasing Dflts From Category	If you select the value of <i>Item PriceList</i> . for the Source field on this page, then you can select this check box to use the item category defaults that you established in the Item Categories (CATEGORY_TBL) component when creating the Purchasing Item Attributes segment of the item.
Process by date/time	If you select the value of <i>Catalog Management</i> for the Source field on this page, then you can use this check box to load items incrementally. Therefore, if the items have been previously imported, the next import only includes those items that have changed in PeopleSoft Catalog Management.
Delete Loaded Items	If you select the value of <i>Item PriceList</i> . for the Source field on this page, then you can select this check box to delete item records from the item price list staging tables as they are copied to the item loader staging tables. This enables you to work with smaller batches of item information by running the process several times against the same item price list load staging tables until all records in the tables have been processed. To keep the data in the staging tables for audit purposes, do not select this check box.
Add Hierarchy ID as Node	If you select the value of <i>Catalog Management</i> for the Source field on this page, then you can use this check box to create the hierarchy ID as a node. If you don't select this check box, the system disregards the hierarchy ID. Note: If you do not have a hierarchy, the system does not load the items.

Field or Control	Description
Tree Name	Select the tree that is to be populated with the categories. If the name specified does not exist, you will be asked if a tree should be created. If the answer is yes, the tree will be created; otherwise, the system asks you to select another tree name.
Auto Assign ID	If you select the value of <i>Catalog Management</i> for the Source field on this page, then you can use this field to select the method by which the process assigns item IDs: <i>For All New Items</i> or <i>When Item ID is not specified</i> .
Language	Select the language in which you want the catalog items to appear.
Catalog Destination	If you select the values of <i>CUP File (Access Database)</i> or <i>xCBL 3.0XML File</i> for the Source field on this page, then the Catalog Destination field enables you to choose to load the data in the item master table (<i>Master</i>) or in the express catalog (<i>Express</i>). This field is not available when using the values of <i>Catalog Management</i> , <i>Express Catalog</i> , or <i>Item PriceList</i> in the Source field.
Inactive Level	Select the level at which you want to inactivate an item. Values include: • <i>Item Supplier</i> • <i>Item Supplier Price</i>

Items Defaults Page

Use the Items Defaults page (PV_CP_RUN_DEFAULTS) to enter items defaults.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Import Item Catalog File > Item Defaults

This example illustrates the fields and controls on the The Item Defaults page in the Procurement Catalog Load component. You can find definitions for the fields and controls later on this page.

The Catalog Import process leverages the Price List Load and Item Loader processes. The Price List Load process assigns priority suppliers if required, assigns an item ID if required, sets the effective date for pricing, and sets the audit actions correctly.

The Item Loader process validates the data and inserts the data into the production Item Master table.

<i>Field or Control</i>	<i>Description</i>
Last Update	Indicates the last time that the items were loaded.

<i>Field or Control</i>	<i>Description</i>
Image Folder	Designate an image folder where images are kept.
Inventory Item	Select to designate that the system creates items as inventory items. By default, the system deselects the Inventory Item check box value.
Account	Enter a code for all categories created in order to run all future processes successfully.
Currency	Enter the currency code for all categories created in order to successfully run all future processes.

Validate and Process Imported Items Page

Use the Validate and Process Imported Items page (PV_CP_PROCESS) to validate and process imported items.

Navigation:

Click the **Process Imported Items** link on the Procurement Catalog Load page.

Use this page to review information about the marketplace supplier before you load their catalog items. You can also review new catalog categories and item statuses before you load them into a catalog.

Field or Control	Description
Marketplace Supplier	Displays the supplier to which the corresponding row of data belongs. The supplier's name also appears.
Count	Displays the number of items the system loads or has loaded from this supplier.
Categories	Click to view the categories in which the imported items are to be placed.
View Items	Click to access the Imported Item Status page, where you can view statuses for individual items.

Defining Item Catalogs

To define item catalogs, use the Tree Manager (PSTREEMGR) component.

Page Used to Define Item Catalogs

Page Name	Definition Name	Usage
"Tree Manager Page" (PeopleSoft Order to Cash Common Information)	PSTREEMGR	Define the item catalogs.

Understanding Defining Item Catalogs

Item catalogs limit access to items in the PeopleSoft Item Master table, and are used by both the rule-based item catalog method and the business unit and requester level security.

To use item catalogs, you define item catalogs using the PeopleSoft Tree Manager.

Setting Up Catalog Security

To set up catalog security, use the eProcurement Catalog Security Option (PV_CAT_FACTORY), the Catalog Types (PV_CAT_SOURCE), and the Catalog Security Type (PV_CAT_SEC_TYPE) components.

This section provides an overview of catalog security and discusses how to define catalog security options, define catalog types, define catalog security types, assign authorized item catalogs to security types, and define catalog security for business units.

Pages Used to Set Up Catalog Security

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Setting Up Installation Options for Fluid eProcurement	PV_INSTALLATION_PV	Define the catalog search type. To include business-unit level item catalog security, enter <i>Y</i> in the BU Catalog Control field.
eProcurement Catalog Security Option Page	PV_CAT_FACTORY	Define catalog security options. These are system wide access policies and GUI formats for the rule-based item catalog method.
Catalog Types Page	PV_CAT_SOURCE	Define catalog types.
Catalog Security Types Page	PV_CAT_SEC_TYPE	Define catalog security types. These are levels at which you apply catalog security, for example, at the user role level or the individual requester level.
Security Type Attributes Page	PV_CAT_ST_ATTR	Define security type attributes which include query or prompt tables used.
Catalog Security Page	PV_CAT_SECURITY	Assign authorized item catalogs to security types.
eProcurement Business Unit Actions Page	PV_ACTIONS_BU	Define catalog security for business units. The applicable eProcurement actions enable security for items from the business template, express forms, and direct connect suppliers.

Understanding Catalog Security

Catalog security makes it possible for you to control who uses a catalog. These techniques are available for controlling access to catalogs:

- Apply item security at business unit and requester levels.

- Apply item security using the rule-based catalog method.

Item Security at Business Unit and Requester Levels

You can limit the items available to the Purchasing business unit, the requester, or both. This method only applies if the items are loaded into the Item Master table. In other words, express forms, direct connect suppliers, and company templates (purchasing kits) are not limited or part of the search and browse functionality of the Search Catalog page.

The business unit level catalog security is maintained in the eProcurement Installation Options page and the Assign Catalog to Business Unit page. You enable the business-unit-level security by selecting the **BU Catalog Control** check box on the eProcurement Installation Options page. When this check box is selected, requesters can only access catalogs specifically assigned to the business unit used to enter the requisition.

Use the Assign Catalog to Business Unit page to define the available item catalogs for each Purchasing business unit. If this page is blank and BU catalog control is selected, then no items are available for requisition entry. The business unit level security applies only to eProcurement requisitions.

This requester level catalog security is maintained in the Requestor Setup page. Select the **Use Only Assigned Catalogs** check box and then enter the acceptable item catalog ID's in the **Catalog Information** section at the bottom of the page. When this check box is selected, the requester can only access catalogs specifically assigned to them. The available item catalogs would have to be defined individually for each requester to which security applied. The requester-level security applies to both PeopleSoft eProcurement and Purchasing requisitions.

In addition, if both the requester level and business unit level catalog security are used, only catalogs assigned to both levels can be accessed by the requesters.

Apply Item Security Using the Rule-Based Catalog Method

The rule-based item catalog method provides a framework to implement item catalog authorization. The architecture is flexible enough to allow for different implementations of item catalog security based on different requirements. This enables you to implement an organization-specific access policy, without the need to modify delivered code and objects.

The rule-based item catalog method uses different security levels (security types) to control item catalog access. The non rule-based method enables you to control security by the business unit level and the requester level; however, the rule-based method enables you to control security at any level that you choose. Just like the non rule-based method, the rule-based method restricts the user to the item catalogs that pass all the security restrictions.

In addition, the rule-based catalog method can extend item catalog security control to other item catalog sources such as company templates (purchasing kits), direct connect suppliers, and express forms.

There are two choices for applying the rule-based item catalog method:

- *Business Unit, User Role, and Requester Level*: PeopleSoft delivers a predefined example that you can implement into the organization.

Much of this setup has already been defined for you; making implementation quicker and easier. This predefined method uses item catalog restrictions at the levels of business unit, user role, and individual requester. It also enables item searching and browsing on the Item Master table, express forms, direct connect suppliers, and company templates (purchasing kits). The addition of user role

enables you to restrict requesters without defining each requester individually; this saves time and maintenance.

- *Rule-Based Item Catalog Method Defined for Unique Needs:* Using the rule-based item catalog method, you can design an item catalog security using any item sources and any restriction level.

This method requires the most set up, but provides the tailored solution to an organization's specific needs.

To set up a rule-based item catalog method:

1. Use the eProcurement Catalog Security Option page to define system wide setting to create an eProcurement requisition.

Do not enable the access policy and GUI class types until you have finished the set up.

2. Use the Catalog Types page to define the item catalog sources, such as, the Item Master table, express forms, direct connect suppliers, and company templates (purchasing kits).
3. Create catalog security types to identify the levels to apply item restriction, such as, by business unit, user role, or requester.

The setup for the security types of business unit, requester, and user role are supplied by the Security Types Default page.

4. Use the Catalog Security page to define the authorized item catalogs for each of the security types.

For the security type of BUSINESS_UNIT, you can use either the Catalog Security page or the Assign Catalog to Business Unit page under Maintain Items. For the security type of REQUESTOR_ID, you can use either the Catalog Security page or the Requestor Setup page.

5. Use the eProcurement Business Unit Actions page to identify the eProcurement actions, such as express forms (EXPRESSFORM_SECURITY), direct connect (DCSUPPLIER_SECURITY), and company templates (TEMPLATE_SECURITY), that should be used for each business unit.
6. Return to the eProcurement Catalog Security Option page and enable the access policy and GUI class types.

Related Links

[Setting Up Searches by Item Attributes](#)

eProcurement Catalog Security Option Page

Use the eProcurement Catalog Security Option page (PV_CAT_FACTORY) to Define catalog security options.

These are system wide access policies and GUI formats for the rule-based item catalog method.

Navigation:

eProcurement > Administer Procurement > Maintain Catalogs > eProcurement Catalog Security Option

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

eProcurement Catalog Security Option

Catalog Security Options Personalize | View All |  First  1-3 of 3  Last

	Class Type	Root Package ID	Application Class Path	Description	Enabled	
1	AccessPolicy	PV_CATALOG_SECURITY	AccessPolicy:IntersectPolicy	Intersect Catalogs authorization	☐	 
2	GUI	PV_CATALOG_SECURITY	GUI:CatalogSecurityGUI	GUI Implementation	☒	 
3	RegionFilter	PV_CATALOG_SECURITY	Catalogs:VendorRegionFilter	Regional Security by Vendor Locations	☐	 

[Return to Administer Procurement](#) [Return to Maintain Catalogs](#)

Use this page to define the access policy for the item catalogs and the GUI presentation for the Catalog Securities component. If you customize the access policy or GUI presentation, then insert a new row with a new implementation application class.

See *PeopleTools: PeopleCode Developer's Guide*

Field or Control	Description
Class Type	Enter the interface classes to be used of access policy and GUI presentation. The system is delivered with the class types already defined. However, you can customize and add versions of these classes. The system delivered classes are: 1. <i>AccessPolicy</i>: Defines the processing logic for item catalogs to be accessed by a user. When a requester is entering a requisition, the available items are limited based on this logic. This class type enables the system to retrieve only the items that are authorized by all applicable security types. 2. <i>GUI</i>: Defines the GUI presentation for the Catalog Security component (PV_CAT_SECURITY). It provides an interface, where you can create a customized page layout for the Catalog Security page by implementing an implementation application class. 3. <i>RegionalFilter</i>: Defines regional item and supplier security for item browsing and searching.
Root Package ID	Select the package of the PeopleCode class that you created.

Field or Control	Description
Application Class Path	Enter an application class to further define the implementation (class types). You must enter implementation application classes for the class types of <i>AccessPolicy</i> and <i>GUI</i>. The system is delivered with two implementation application classes. You can override these with custom versions. 1. <i>IntersectPolicy</i> (for the <i>AccessPolicy</i> class type): Defines how item catalogs are to be accessed by a user. This application class limits a requester to viewing item catalogs that are included in all security types used. In other words, it is the intersection of item catalogs retrieved by all security types. If you decide that the environment requires a different approach to item retrieval, then you can define an implementation application class. 2. <i>CatalogSecurityGUI</i> (for <i>GUI</i> class type): Defines the layout of the pages in the Catalog Security component. If you want to have a different GUI presentation, create a new implementation application class. 3. <i>Catalogs:SupplierRegionFilter</i>: Defines regional security by supplier locations.
Description	Enter a brief description of the purpose of the class type and implementation application class.
Enabled	Select to activate the class type and implementation application class combination for the row. Do not select this check box until you have completed the system setup for item catalog security.

Catalog Types Page

Use the Catalog Types page (PV_CAT_SOURCE) to define catalog types.

Navigation:

eProcurement > Administer Procurement > Maintain Catalogs > Catalog Types

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

Catalog Types

Catalog Types		Personalize View All 	First 	1-4 of 4 	Last	
	Type	Description	Record Name	Enabled		
1	C	Master Item Catalogs	PV_CAT_CATID_VW	☒		
2	D	Direct Connect Suppliers	PV_DC_SUPP_VW	☒		
3	E	Express Forms	PV_EF_SUPP_VW	☒		
4	T	Company Templates	PV_CAT_TEMPL_VW	☒		

[Return to Administer Procurement](#)

[Return to Maintain Catalogs](#)

Use this page to identify the types of item sources that should be available for requisition entry or retrieved by the search and browse feature. Enter all catalog types for use across the organization; this page applies system wide. The catalog types enabled on this page appear in the **Catalog Type** field on the Catalog Security page.

Field or Control	Description
Type	Enter the catalog type. Use one or more of these options: <i>C</i>: Items located in the PeopleSoft Item Master table. This can include items from the marketplace or the express catalog. <i>D</i>: Items from direct connect suppliers. <i>E</i>: Express forms. <i>T</i>: Company templates.
Record Name	Enter the record definition that contains all the values for the item source. The system is delivered with the record names for the Item Master table, direct connect suppliers, express forms, and business templates. You can change this record name if you are customizing this area.
Enabled	Select to authorize access to this item source on the Catalog Security page. The system automatically changes to <i>Y</i> (yes) for type <i>C</i> and to <i>N</i> (no) for all other catalog types.

Catalog Security Types Page

Use the Catalog Security Types page (PV_CAT_SEC_TYPE) to define catalog security types.

These are levels at which you apply catalog security, for example, at the user role level or the individual requester level.

Navigation:

eProcurement > Administer Procurement > Maintain Catalogs > Catalog Security Types

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

Security Type	Root Package ID	Application Class Path	Description	Active	Catalog Security
BUSINESS_UNIT	PV_CATALOG_SECURITY	SecurityType:BusinessUnitSecurityType	Business Unit Security Type	☐	Catalog Security
REQUESTOR_ID	PV_CATALOG_SECURITY	SecurityType:RequestorSecurityType	Requestor Security Type	☐	Catalog Security
ROLENAME	PV_CATALOG_SECURITY	SecurityType:QuerySecurityType	Role Security Type	☐	Catalog Security

Use this page to define the levels where security should be applied. For example, suppose that the items available should be restricted by the business unit used to enter the requisition, then activate the row for business unit on this page. You can have multiple security levels defined.

The system is delivered with three security types, business unit, requester ID, and role name. You can add additional security types, for example, ship to location, by inserting a new row on this page. When a user enters a requisition, the list of authorized item catalogs is the intersection of the catalogs granted to each of the security types.

Field or Control	Description
Security Type	Enter a descriptive name for the security type. The system is delivered with <i>BUSINESS_UNIT</i> , <i>REQUESTOR_ID</i> , and <i>ROLENAME</i> .
Root Package ID	Enter the parent application package.
Application Class Path	Enter an interface class that contains the processing logic for the security type. The system is delivered with <i>BusinessUnitSecurityType</i> , <i>RequestorSecurityType</i> , and <i>QuerySecurityType</i> . The implementation application classes for business unit and requester are specific to those security types and link them into the existing item catalog security system using the Assign Catalog to Business Unit page and the Requestor Setup page. However, the <i>QuerySecurityType</i> is not specific to the user role name and can be used with any additional security types that you may add to this page. For example, suppose that you decide to add a ship to location as a security type, then you can use the <i>QuerySecurityType</i> class for both role name and ship to.
Description	Enter a description of the security type.

Field or Control	Description
Active	Select to enable this security type for the SetID. If you select this for the security type of <i>BUSINESS_UNIT</i>, then the system: 1. Selects the BU Catalog Control check box on the eProcurement Installation Options page and makes it unavailable for selection. 2. Looks to the Assign Catalog to Business Unit page, as well as the Catalog Security page, to determine the authorized item catalogs. If you activate the security type <i>REQUESTOR_ID</i>, then the system: 1. Looks to the Requestor Setup page, as well as the Catalog Security page, to determine the authorized item catalogs. 2. Does not use the Default Access field on the Security Type Attributes page.
Catalog Security	Click to access the Category Security page, where you can update security parameters.

Security Type Attributes Page

Use the Security Type Attributes page (PV_CAT_ST_ATTR) to define security type attributes which include query or prompt tables used.

Navigation:

eProcurement > Administer Procurement > Maintain Catalogs > Catalog Security Types

Click the **Attributes** tab.

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

[Security Types](#)
[Attributes](#)
[Defaults](#)

Security Type Attributes

Set ID SHARE

Security Type Attributes
Personalize | View All |
First 1-3 of 3 Last

Security Type	Default Access	Query Name	Prompt Table	SetID Control
BUSINESS_UNIT	Y		SP_BU_PM_NONVW	☐
REQUESTOR_ID	Y		RQSTR_ACTIVE_VW	☐
ROLENAME	Y	PV_CAT_ROLENAME_QF	PV_CAT_ROLE_VW	☐

[Catalog Security Types](#)

Use this page to define the attributes for each of the security levels that you defined on the Security Types page.

Field or Control	Description
Default Access	Determines access to catalogs when no data entry found for the security type in Catalog Security page. Enter <i>Y</i> to access all item catalogs and enter <i>N</i> for no access to item catalogs. For example, for the security type of business unit, if you do not enter the business unit <i>AUS01</i> on the Catalog Security page, then a default access value of <i>Y</i> gives <i>AUS01</i> access to all item catalogs; However, a default access value of <i>N</i> gives <i>AUS01</i> no access to any item catalogs. Since the system uses an intersect policy, <i>N</i> would prevent any entries into the business unit <i>AUS01</i>. Note: The Default Access field is not applicable to the security type of <i>REQUESTOR_ID</i>, because the system always loads all requesters into the Catalog Security page.
Query Name	Enter a query record name to retrieve the acceptable values based on the security type record definitions. A query is required if the implementation application class on the Catalog Security Types page is the <i>QuerySecurityType</i> class. Design this query to retrieve the needed data to find rows. All necessary values can be retrieved based on the requisition's business unit, requester, or user ID. For example, if the ship to location is defined as a security type, then the query would be designed to retrieve the ship to based on the user ID on the User Preferences - Procurement page.
Prompt Table	Enter the prompt table to be used for this security type. A prompt table is required if the implementation application class is the system-delivered <i>QuerySecurityType</i>.
SetID Control	Select whether the security type query in the Query Name field is SetID controlled.

Catalog Security Page

Use the Catalog Security page (PV_CAT_SECURITY) to assign authorized item catalogs to security types.

Navigation:

eProcurement > Administer Procurement > Maintain Catalogs > Catalog Security Types

Click the **Catalog Security** link.

This example illustrates the fields and controls on the Catalog Security page (1 of 2). You can find definitions for the fields and controls later on this page.

Catalog Security

Security Type BUSINESS_UNIT Find 

First  1-7 of 7  Last

Value CAN01 	☒ Active
Authorized Catalogs	
Value FRA01 	☒ Active
Authorized Catalogs	
Value JPN01 	☒ Active
Authorized Catalogs	
Value US001 	☒ Active

This example illustrates the fields and controls on the Catalog Security page (2 of 2). You can find definitions for the fields and controls later on this page.

Value US002 	☒ Active
Authorized Catalogs	
Value US003 	☒ Active
Authorized Catalogs	
Value US015 	☒ Active
Authorized Catalogs	
Add	
Update All Business Units	
*Catalog Type Master Item Catalogs 	Select Catalogs
Return to Administer Procurement	Catalog Security Types

For each security type (security level), define what item catalogs are available.

Field or Control	Description
Find	Enter a value on which to search in the scroll area. Use this field when you have a large number of values in the scroll area.
Value	Select a field value that you have defined for this security type.
Active	Select to enable the item catalogs security for this value. If this value is not selected, then the Default Access field on the Security Type Attributes page is applied.
Authorized Catalogs	Click the Show Authorized Catalogs button to display or enter the set of item catalogs authorized for the value. This includes all item catalogs, no catalogs, or a specific set of catalogs. To add item catalogs, select the catalog type and click the Select Catalogs link to display all valid catalogs, then select the catalog and click the OK button. The new catalog appears in the Authorized Catalogs section.
Add	Select to add a new row to this page, so that you can enter a new value.

Update All Business Units

Use this section to add or remove item catalogs to all of the listed values. For example, if a new item catalog is created after implementation, use this feature to add the catalog to all business units, requesters, and user roles. To add or remove item catalogs, select the catalog type, use the **Select Catalogs** link to display all valid catalogs, then select the catalogs and click the **Add To All** or **Remove From All** button.

eProcurement Business Unit Actions Page

Use the eProcurement Business Unit Actions page (PV_ACTIONS_BU) to identify the PeopleSoft eProcurement actions that should be used for each business unit.

The applicable PeopleSoft eProcurement actions enable security for items from the business template, express forms, and direct connect suppliers.

Navigation:

Click the **eProcurement Business Unit Actions** link on the Maintain Business Units page.

This example illustrates the fields and controls on the eProcurement Business Unit Actions page. You can find definitions for the fields and controls later on this page.

eProcurement Business Unit Actions

Action Name DCSUPPLIER_SECURITY

Description Enable Catalog Security for Direct Connect Suppliers

Business Unit

[Return to Maintain Business Unit](#) [Return to Administer Procurement](#)

If you have set up the system to control access to direct connect, express forms, or company templates, then you must identify specific business units that utilize the catalog security. For each action, you need to identify business units you wish to apply catalog security to:

Field or Control	Description
Action Name	Options are: <i>DCSUPPLIER_SECURITY</i>: Enable item security for items from direct connect suppliers <i>EXPRESSFORM_SECURITY</i>: Enable item security to be applied to express forms. <i>TEMPLATE_SECURITY</i>: Enable item security to be applied to business templates.

Note: Item security is always enabled for the items within the PeopleSoft Item Master table.

Setting Up Searches by Item Attributes

This section provides an overview of searching by item attributes and discusses how to import attributes from a flat file, verify imported attributes, assign cross-references to attribute names, and define regional-based sourcing.

PeopleSoft eProcurement enables you to associate attributes with categories to make item searches more precise. After item attribute searches are implemented, you can select one or more categories on the Advanced Search page and search on the attributes for the selected categories, including their children.

Pages Used to Set Up Searches by Item Attributes

Page Name	Definition Name	Usage
Attribute Name Cross Reference Page	PV_CAT_ATTR_XRF	Assign cross-references to attribute names and assign base UOMs for attributes. Access is limited to users with the eProcurement action role SYSTEM_ADMIN.
Attributes Staging Table Page	PV_ATTR_LOAD_STG	Verify imported attributes. Access is limited to users with the eProcurement action role SYSTEM_ADMIN.
Category Attributes Page	PV_SRCH_CAT_ATTR	Edit category attributes that have been imported from a marketplace. Access is limited to users with the eProcurement action role SYSTEM_ADMIN. eProcurement > Administer Procurement > Maintain Supplier Integration > Category Attributes
eProcurement Business Unit Options Page	PV_BUS_UNIT_PM	Enable regional security for the eProcurement business unit.
Import Attributes Page	PV_ATTR_IMPORT	Import attributes from a flat file. Access is limited to users with the eProcurement action role SYSTEM_ADMIN.
Item Attributes Page	PV_SRCH_ITM_ATTR	Verify and edit item attributes imported from a marketplace. Access is limited to users with the eProcurement action role SYSTEM_ADMIN. eProcurement > Administer Procurement > Maintain Supplier Integration > Item Attributes
Item Supplier by Region Page	ITM_REGION_VNDR	Define regional-based sourcing for items.
Load Attributes from Stage Page	PV_ATTR_RUN_LOAD	Import attributes from the attributes staging table page into the category and item attributes tables. Access is limited to users with the eProcurement action role SYSTEM_ADMIN. eProcurement > Administer Procurement > Maintain Supplier Integration > Load Attributes

Page Name	Definition Name	Usage
Purchasing Attributes Page	ITM_TBL_PUR	Define item information specific to purchasing. eProcurement > Administer Procurement > Maintain Catalogs > Purchasing Attributes
Units of Measure Page	UNITS_OF_MEASURE	Confirm this table includes the UOMs used by the items that you are loading. Set Up Financials/Supply Chain > Common Definitions > Units of Measure > Define System UOM

Understanding Item Searches and Item Attributes

This section discusses:

- Search implementation steps.
- Attributes and categories tables.
- Import, stage, and load attribute process flow.
- Attribute names and unit of measure (UOM) variations.

Search Implementation Steps

Search implementation involves these steps:

1. Import attributes to the staging table.
2. Verify the imported attributes.
3. Designate cross-references for attribute names and units of measure.
4. Load attributes from staging.
5. Maintain marketplace category attributes and item attributes.

Attribute and Category Tables

The category attributes for item attribute searches are stored in table PV_CAT_ATTR_TBL, which includes these fields:

Field	Field Type
SETID	(key field)

Field	Field Type
CATEGORY_TYPE	(key field)
CATEGORY_CD	(key field)
CATEGORY_ID	(key field)
ATTRNAME	(key field)
LANGUAGE_CD	(key field)
DESCR	(character)
UOM_ATTR	(Assuming that ISO standard UOM is used.) Note: You might need to add units of measure to the system or convert units of measure.
FLAG	(numeric flag)

This table represents an example of category attributes using the fields defined above for the table PV_CAT_ATTR_TBL:

The image displays example of category attributes.

SetID	Category_Type	Category_ID	Category_CD	Attr_Name	Language_CD	Descr	UOM_Attr	Flag
SHARE	PSF	1	Office Supplies	Weight	ENG	Weight	LBS	Y
SHARE	PSF	1	Office Supplies	Size	ENG	Size		N
SHARE	PSF	1	Office Supplies	Height	ENG	Height	M	Y
SHARE	PSF	1	Office Supplies	Color	ENG	Color		N
SHARE	PSF	2	Computer	Speed	ENG	Processing Speed	MHZ	Y
SHARE	PSF	2	Computer	Memory	ENG	Hard Drive	GB	Y
SHARE	PSF	2	Computer	Modem	ENG	Modem Speed	KPS	Y

Item attributes for the item attribute search are stored in the PV_ITM_ATTR_TBL table, which includes:

Field	Field Type
SETID	(key field
INV_ITEM_ID	(key field
ATTRNAME	(key field
ATTVALUE	(character field)
UOM_ATTR	UOM attributes
PV_ATTRVALUE	numeric field

This table represents an example of item attributes using the fields defined above for the table PV_ITM_ATTR_TBL:

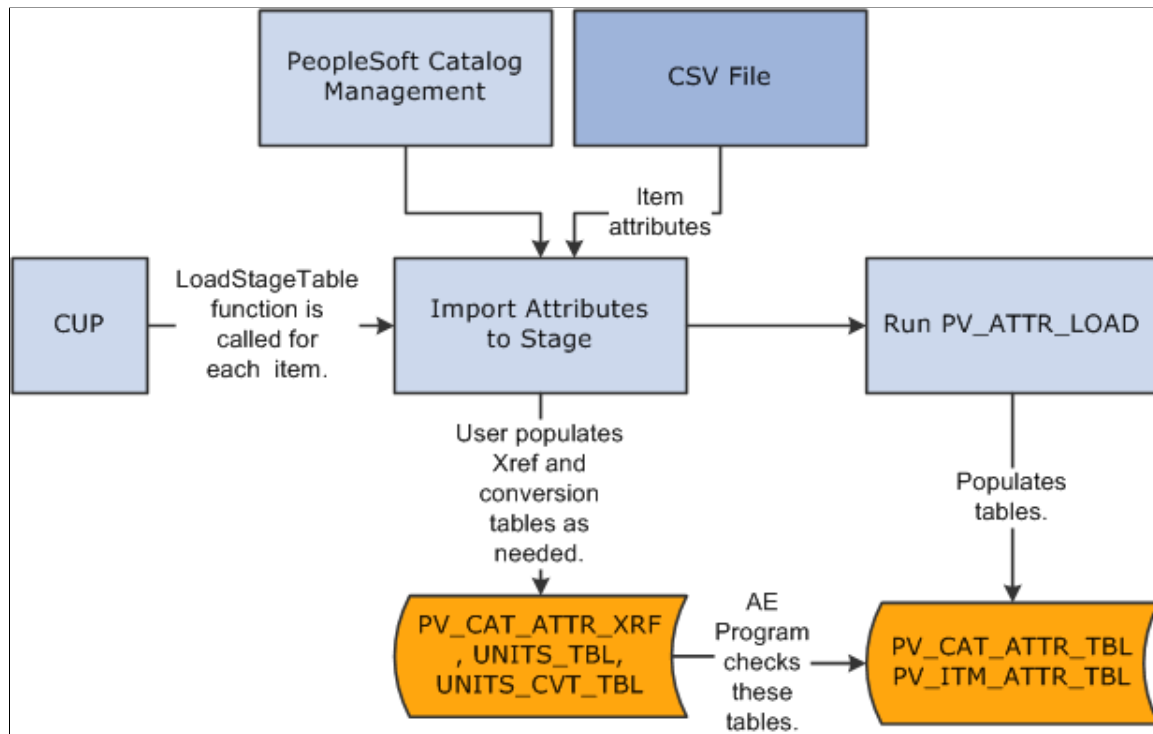
This image displays example of item attributes.

SetID	INV_ITEM	ATTR_NAME	ATTR_VALUE	PV_ATTR_VALUE	UOM_ATTR
SHARE	1	Weight	10	10	LBS
SHARE	1	Size	Med	0	
SHARE	1	Height	2	2	IN
SHARE	2	Weight	50	50	LBS
SHARE	2	Color	Blue	0	
SHARE	2	Size	Large	0	
SHARE	3	Speed	233	233	MHZ
SHARE	3	Memory	4	4	GB
SHARE	3	Modem	56	56	KPS
SHARE	4	Memory	400	400	MB

Import, Stage, and Load Attribute Process Flow

This diagram demonstrates the flow for setting up for item attribute searches from loading item attributes from PeopleSoft Catalog Management, a CSV file, or a CUP file into the eProcurement item attributes and catalog attributes tables:

Image displays item attribute search process flow.



Attribute Names and UOM Variations

You might have variations in the units of measure:

- If the item load creates redundant attribute names for a category, designate cross-references for the attribute names.

For example, you might have a category called office supplies with items that use both *WGT* and *WEIGHT* as attribute names for weight.

- If the item load creates redundant UOM names for an attribute in a category, cross-reference the UOM names.

PeopleSoft eProcurement provides table PV_CAT_ATTR_XRF for cross-referencing attribute names and units of measure. It contains these fields:

Field	Field Type
SETID	(key field)
CATEGORY_TYPE	(key field)

Field	Field Type
CATEGORY_ID	(key field)
CATEGORY_CD	(key field)
ATTRNAME	(key field; original attribute name or attribute UOM)
PV_ATTRNAME	(convert to new attribute name or attribute UOM)
UNIT_OF_MEASURE	(base UOM)

Use the Attribute Name Cross-Reference page to create cross-references for attribute and UOM names.

PeopleTools: Tree Manager

Import Attributes Page

Use the Import Attributes page (PV_ATTR_IMPORT) to import attributes from a flat file.

Access is limited to users with the eProcurement action role SYSTEM_ADMIN.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Import Attributes

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

Import Attributes

SetID: 

*File Type: Comma Delimited 

File Directory:

[Attributes Staging Table](#) [Return to Administer Procurement](#)

Use this page to stage attributes to eProcurement from a flat file as the first step in integrating the attributes into searches. The most typical data load consists of marketplace items, but you can import attributes from any properly formatted text file.

Field or Control	Description
SetID	Select a SetID from the available options. If the flat file has no SetID, select <i>SHARE</i> .
File Type	Select <i>Comma Delimited</i> for text files.
File Directory	Enter the directory where the flat file is located. Note: The fields included in this directory are listed following these field descriptions.
Import Attributes	Click to import the flat file to PeopleSoft eProcurement.
Attributes Staging Table	Click to access the Attributes Staging Table page, where you can verify the attributes that you have imported.

File Directory Fields

These fields are in the File Layout PV_ATTR_LOAD_COMMA. Fields that are marked with an asterisk (*) are required:

***SETID**

***INV_ITEM_ID**

***ATTRNAME**

***LANGUAGE_CD**

PV_CV_SPN

PV_CV_PART_EXT

***MFG ID**

***MFG ITEM ID**

CATEGORY_TYPE

CATEGORY_CD

CATEGORY_ID

***DESCR**

***ATTRVALUE**

UOM_ATTR

These rules apply to the previous fields:

- **SETID** is required only if you have not selected a SetID on this page.
- **INV_ITEM_ID** or **MFG_ID** and **MFG_ITEM_ID** is required unless you include values for **PV_CV_SPN** and **PV_CV_PART_EXT**.
- These fields are comma-delimited with no additional spaces (empty fields must also be delimited).
- For multi-languages, the only field that should be translated is **Attribute Description, DESCR**.

The **Attribute Name** field, **ATTRNAME**, must be the same across all languages for the same attribute.

Example

SHARE,10012,WEIGHT,ENG,,,BIKE-01,BIKE-ITM-12,,,,Weight,10,LBS

SHARE,10013,LEN,ENG,,,BIKE-01,BIKE-ITM-13,,,,Length,5,IN

SHARE,10014,WGT,ENG,,,BIKE-01,BIKE-ITM-14,,,,Weight,12,KG

SHARE,10014,WIDTH,ENG,,,BIKE-01,BIKE-ITM-14,,,,Width,6,IN

SHARE,10015,LEN,ENG,,,BIKE-01,BIKE-ITM-15,,,,Length,10,FT

SHARE,10015,COLOR,ENG,,,BIKE-01,BIKE-ITM-15,,,,Color,RED,

SHARE,10015,WEIGHT,ENG,,,BIKE-01,BIKE-ITM-15,,,,Weight,5,OZT

Attributes Staging Table Page

Use the Attributes Staging Table page (PV_ATTR_LOAD_STG) to verify imported attributes.

Access is limited to users with the eProcurement action role SYSTEM_ADMIN.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Attributes Staging Table

This example illustrates the fields and controls on the Attributes Staging Table page: Item Attributes tab. You can find definitions for the fields and controls later on this page.

Attributes Staging Table

Attributes Staged and Ready for Loading:

List of Item Attributes Personalize | Find | View All | 1 of 1 | First | Last

Item Attributes | Mfg and Category | Status

Item ID	Supplier Part Number	Extension	Attribute Name	Language	Description	Attribute Value	Attribute

[Load Attributes](#) [Add Units of Measure](#) [Attr. Name/UOM Cross-Reference](#) [Return to Administer Procurement](#)

Use the page to view or edit item attributes loaded into the PV_CAT_ATTR_TBL and PV_CAT_ATTR_XRF tables. The system populates the fields on this page with the imported values loaded from the Import Attributes page.

There is no need to edit the imported values on this page unless you are required to cross-reference attributes or UOM names. For large amounts of data, use the Attribute Name Cross Reference page or manually convert the UOMs.

When cross-referencing names or converting units of measure, you may receive a warning message advising that multiple UOMs have been imported for one category. Resolve the conflict by designating a base UOM on the Attribute Name Cross Reference page.

If you are importing UOMs that do not already exist in the system, you receive a warning message. To add new units of measure, use the Units of Measure page.

Manufacturing and Category Tab

Select the **Mfg and Category** (manufacturing and category) tab.

<i>Field or Control</i>	<i>Description</i>
Manufacturing ID	Displays the manufacturer of this item. This information comes from the Item Definitions - General page.
Manufacturer's Item ID	Select an identifier for this manufacturer's item.
Category Type, Category, and Category ID	Displays information about the category to which the item belongs.
Numeric	Select to capture item attributes with generic numeric and alphanumeric item attribute fields at both the SetID and business unit level.

Status Tab

Select the **Status** tab.

Field or Control	Description
Processed	Values are: <i>N</i>: Attribute is not loaded. The data is still in the staging table. <i>Y</i>: Attribute is loaded. The data has been loaded from the staging table to the category and item attributes tables. <i>E</i>: Error attribute cannot be loaded or has been loaded with assumptions about the UOM. Note: Attributes are loaded on the Load Attributes from Stage page.
Error Message	If one of these messages appears, you can use the Units of Measure page to add UOMs or create conversions for UOMs: <i>UOM Conversion Rate Not Defined. 1 to 1 Conversion Assumed.</i> <i>Invalid Unit of Measure. Attribute Not Loaded.</i>

Attribute Name Cross Reference Page

Use the Attribute Name Cross Reference page (PV_CAT_ATTR_XRF) to assign cross-references to attribute names and assign base UOMs for attributes.

Access is limited to users with the eProcurement action role SYSTEM_ADMIN.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Attribute Name Cross Reference

This example illustrates the fields and controls on the Attribute Name Cross Reference page. You can find definitions for the fields and controls later on this page.

Attribute Name Cross Reference

SetID SHARECategory ID 00002Category ACCESSORIESAccessories

Attribute Name Cross Reference

Personalize | Find | View All |  

First ◀ 1 of 1 ▶ Last

*SetID	Category ID	Description	*Attribute Name	New Attribute Name	Base UOM		
SHARE 	00002	Accessories					

Attributes Staging Table

Add Units of Measure

Return to Administer Procurement

If you have redundant attribute or UOMs, establish cross-references so that the system can refer to one standard name. Cross-references enable you to establish one name for each attribute and one name for each UOM within a category.

Field or Control	Description
Attribute	Select an attribute for which you want to create a cross reference.
New Attribute Name	Select an attribute name for cross-referencing the selection in the Attribute Name field. If you are creating a UOM cross-reference, leave this field blank.
Base UOM	Select a base UOM for the new attribute name. The name must exist in the UOM table and there must be a conversion for the UOM. You can create a conversion on the Units of Measure page.

Note: For each category that you use, only one UOM is allowed for each attribute. For example, for the attribute *Length*, you cannot use both inches and feet as the unit; however, you can use inches in one category and feet in another.

Item Supplier by Region Page

Use the Item Supplier by Region page (ITM_REGION_VNDR) to define regional-based sourcing for items.

Navigation:

eProcurement > Administer Procurement > Maintain Catalogs > Item Supplier by Region

This example illustrates the fields and controls on the Item Supplier by Region page.

Use this page to set up regional sourcing for an item and define priority suppliers by item regions. This enables regional item and supplier security for item browsing and searching. When an item has a supplier-region relationship, the system applies security to filter out suppliers and supplier locations that do not belong to the same region as the ship to region.

To define regional-based sourcing:

1. Use the eProcurement Installation Options page to enable the Search Engine.

Select *Search Engine* as the **Catalog Search Type**. To access the page, select **eProcurement > Administer Procurement > Maintain Overall System Options > eProcurement Installation Options**.

2. Use the eProcurement Role Actions page to enable the VIEW_ALL_SUPPLIERS action. To access the page, select **eProcurement > Administer Procurement > Maintain System Users and Roles > eProcurement Role Action**.

3. Use the eProcurement Catalog Security Option page to enable catalog security.

Select the **Enabled** check box for the following Class Types: Access Policy, GUI, and Region Filter. To access the page, select **eProcurement > Administer Procurement > Maintain Catalogs > eProcurement Catalog Security Option**.

4. Use the eProcurement Business Unit Options page to enable regional security.

Select the **Enable Req Region Security** check box to activate sourcing security. To access the page, select **eProcurement > Administer Procurement > Maintain Catalogs > eProcurement Business Unit Options**.

5. Use the Purchasing Attributes page to define item information specific to purchasing such as the preferred supplier.

To access the page, select **eProcurement > Administer Procurement > Maintain Catalogs > Purchasing Attributes**.

6. Use the Purchasing Controls page to verify that the **Available in All Regions** option is not selected.

To access the page, select **eProcurement > Administer Procurement > Maintain Catalogs > Purchasing Attributes**. Select the Purchasing Controls tab.

7. Use the Item Supplier by Region page to establish the relationship between the item, region, and supplier.

Related Links

“Sourcing by Region” (PeopleSoft Purchasing)

Setting Up and Using the Express Catalog

This section provides an overview of express catalogs and discusses the pages used to set up and utilize express catalogs.

Pages Used to Set Up and Use the Express Catalog

Page Name	Definition Name	Usage
<u>eProcurement Installation Options Page</u>	PV_INSTALLATION_PV	Use the Item Source Option field to identify whether the system should use items from the item master tables, the express catalog, or both when browsing or searching for items using PeopleSoft eProcurement.
eProcurement Business Unit Options Page	PV_BUS_UNIT_PM	Use the Item Source field to identify whether the system should use items from the item master tables, the express catalog, or both when browsing or searching for items within a business unit. You will only be able to utilize express items if you selected either the <i>Express Items Only</i> or the <i>Master and Express Items</i> option from the eProcurement Installation Options page.
<u>Procurement Catalog Load Page</u>	PV_CP_IMPORT_RUN	Use the Source field to add <i>CUP File (Access Database)</i> or <i>xCBL3.0XML File</i> as a load type and then select <i>Express</i> in the Catalog Destination field to load the data in the express catalog.

Understanding the Set Up and Use of Express Catalogs

The express catalog enables you to index items that were loaded from a marketplace into the PeopleSoft EOCM_GEN_TBL table. These express items are not added to the master item tables. This precludes the requirement of running the Item Load process, making it easier to configure PeopleSoft eProcurement. This is particularly valuable to customers who do not use PeopleSoft Inventory or rely on Purchasing item attributes.

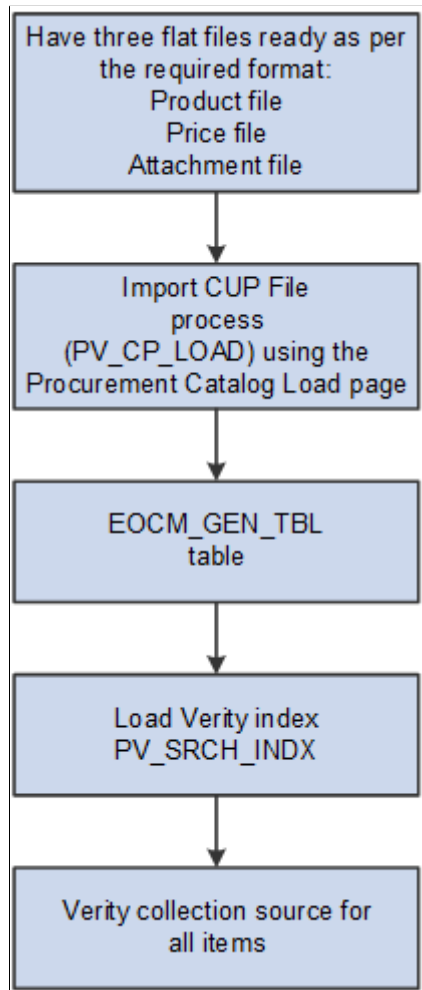
To set up the express catalog, an administrator:

- Extracts data from the CUP file into eProcurement.
- Sets up requesters to browse, search, and select items from the express catalog.
- Uses express catalog items in rule-based security.

Express Catalog Load Processing

This diagram illustrates the flow for loading express catalog files:

The process flow for loading express catalog items



Related Links

[Understanding PeopleSoft eProcurement Catalogs](#)

Integrating with PeopleSoft HRMS

Understanding PeopleSoft eProcurement and HRMS Integration

PeopleSoft eProcurement enables you to use employee information that is stored in the PeopleSoft HRMS database to create requesters and automatically update PeopleSoft eProcurement, based on changes to the employee data. The integration is accomplished with PeopleSoft Integration Broker, which enables you to receive service operations sent by PeopleSoft HRMS. When changes are made to the record in HRMS, they are automatically received by eProcurement.

The service operations are delivered with a status of *Inactive*. You must activate each service operation before attempting to publish or subscribe. The service operations that are sent by PeopleSoft HRMS must be activated in that database, and the messages to which PeopleSoft eProcurement receives must be activated in the PeopleSoft FDM database.

The integration between PeopleSoft HRMS and PeopleSoft eProcurement enables you to preform these tasks:

- Send new user data from HRMS to eProcurement.
- Automatically create requesters if a user contains a role that is predefined in Supply Chain Management as having access to the component.
- Automatically inactivate a requester when a user account is locked out.

When updating information between databases, PeopleSoft Integration Broker imposes these outbound and inbound rules:

- Full Table Publish (outbound)

This rule erases all data from the target table and replaces it with data from the source table.

- Incremental Table Publish (outbound)

This rule captures the addition, change, or deletion of data that is performed in the source database and either inserts a new row of data, or deletes, or updates the corresponding row of data in the target database.

Note: PeopleSoft eProcurement receives data changes from the PeopleSoft HRMS database. It does not send data to PeopleSoft HRMS (except for the USER_PROFILE service operation). Also, PeopleSoft eProcurement does not receive any full table user profile data changes. It only receives incremental data changes.

Setting Up HRMS Integration

This section discussed how to set up the human resource management service operations and set up defaults for automatic creation of users and requesters.

Pages Used to Set Up HRMS Integration

Page Name	Definition Name	Usage
<u>Requester Integration Defaults Page</u>	PV_HR8_DEFAULTS	Enter user and requester defaults for utilization in requester integration processing.

Setting Up the Human Resource Management Service Operations

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

1. Define the requester role in eProcurement.
2. Setup within PeopleSoft Integration Broker and Enterprise Components:

Use the information in this table and refer to the setup instruction in “Setting Up Service Operations” (PeopleSoft Supply Chain Management Integration).

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
USER_PROFILE	Inbound Asynchronous	Update_User_Profile UserProfileAnd Requester	No	HRMS
JOBCODE_SYNC	Inbound Asynchronous	JobcodeSync	No	HRMS
JOBCODE_ FULLSYNC	Inbound Asynchronous	JobcodeFullSync	No	HRMS
PERSON_BASIC_ FULLSYNC	Inbound Asynchronous	PersonBasicFullSync	No	HRMS

Warning! The `JOB_CODE_FULLSYNC` and the `PERSON_BASIC_FULLSYNC` should not be activated unless the organization is performing an initial implementation and no actual data exists in the PeopleSoft FSCM database.

If you change the status of these service operations to *Active*, the data in the PeopleSoft FSCM database will be overwritten. Do not activate the `FULL_SYNC` versions in PeopleSoft HRMS or PeopleSoft FSCM unless you intend to overwrite all the data in the target tables.

PeopleTools: Integration Broker

Requester Integration Defaults Page

Use the Requester Integration Defaults page (`PV_HR8_DEFAULTS`) to enter user and requester defaults for utilization in requester integration processing.

Navigation:

eProcurement > **Administer Procurement**

Click the **Maintain System Users and Roles** link on the Administer Procurement page.

Click the **Requester Integration Defaults** link on the Maintain System Users and Roles page.

This example illustrates the fields and controls on the Requester Integration Defaults page.

Requester Integration Defaults

User Preferences

SetID
Business Unit
Currency Code

Requester Defaults

Ship To Location
Location Code
Origin

User Profile

Symbolic ID
Password ☒ Expire password at next login
Language Code ☐ Multi Language Enabled?

Permission Lists

Navigator
Process Profile
Primary
Row Security

Base Roles

[Return to Administer Procurement](#)

For the purpose of integrating with HRMS, you only need to define the fields within the **User Preferences** and the **Requester Defaults** group boxes.

The user profile defaults are used to enable automatic creation of users who do not exist when using the requester integration.

Integrating with the Oracle Business Network

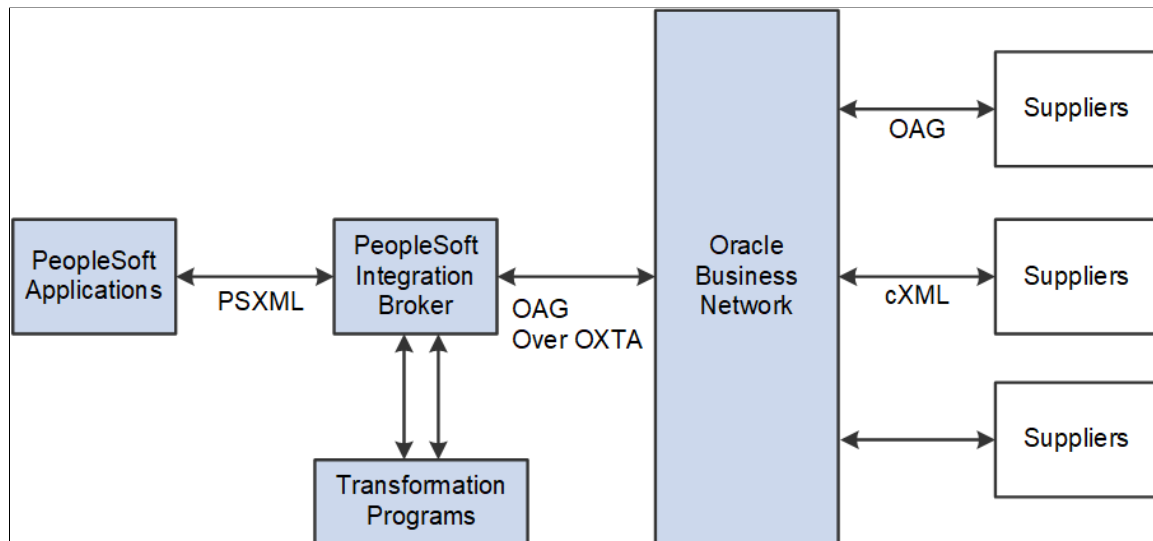
Understanding the Integration Between the Oracle Business Network, PeopleSoft eProcurement, and PeopleSoft eSettlements

The Oracle Business Network (OBN) is an hosted service offering in which buyers and sellers use a common hub for exchanging and monitoring transactions. The integration between OBN and PeopleSoft enables you to pass the following transactions:

- Purchase orders and change orders from PeopleSoft to the OBN supplier (outbound transactions). The purchase order is passed to suppliers through OBN. Suppliers can decide their delivery method, and monitor transactions on OBN.
- Purchase order acknowledgement (POA) or a POA with changes from the OBN supplier to PeopleSoft (inbound transactions). The supplier's POA is sent through OBN to PeopleSoft.
- Advanced Shipping Notification (ASN) from the OBN supplier to PeopleSoft (inbound transaction). The supplier's ASN is sent through OBN and loaded into PeopleSoft as an advanced shipment receipt (ASR) where you can create a receipt in PeopleSoft.
- Invoices from the OBN supplier to PeopleSoft (inbound transaction). The supplier's invoice is sent through OBN and loaded into PeopleSoft where you can create a voucher in PeopleSoft eSettlements.
- Punchout to OBN Supplier from PeopleSoft Fluid Create requisition (outbound transaction). Through eProcurement, requesters are redirected to the supplier site via OBN, where they can browse available products and add selected items directly to their requisition cart.
- Import OBN supplier catalog items to PeopleSoft eProcurement (inbound transaction). OBN facilitates the suppliers to share their catalog to Peoplesoft, enabling requesters to search, view, and select items from integrated supplier content in the Fluid Create Requisition – Browse Catalogs page.

The following diagram illustrates the communication protocols between PeopleSoft, the Oracle Business Network, and the OBN suppliers. PeopleSoft should use OAG (Open Applications Group) XML for the outbound transaction since OBN supports incoming OAG messages over HTTP. The OBN suppliers can send and receive messages using cXML or OAG.

This image illustrates the communication protocols between PeopleSoft, the Oracle Business Network, and the OBN suppliers.



For outbound transactions from the PeopleSoft eProcurement or Purchasing applications, the PeopleSoft Integration Broker (Integration Gateway) uses application engine transformation programs and the `fscm_epo_OSNListeningConnector` IB connector to convert XML messages that use the PeopleSoft format (PSXML) into OAG XML files. For inbound transactions from the Oracle Business Network to PeopleSoft eSettlements, OAG XML messages are sent to the PeopleSoft Integration Gateway where transformation programs and the `fscm_epo_OSNListeningConnector` IB connector convert the incoming files into the PSXML format.

Prerequisites

To set up the connection between eProcurement, eSettlements, and the Oracle Business Network (OBN), you must register with OBN and invite your suppliers to register with OBN.

Common Elements Used

<i>Field or Control</i>	<i>Description</i>
PSXML	An XML file that uses the PeopleSoft format.
OBN	The Oracle Business Network (OBN) is a hosted service provided by Oracle OnDemand for handling transactions between Oracle systems and suppliers.
OAG	Open Application Group. OBN supports incoming OAG messages over HTTP.

Field or Control	Description
OXTA	Oracle XML Transport Agent. OXTA is a lightweight messaging platform for transmitting documents over HTTP and secure HTTPS.
UOS	Universal Order Schema
cXML	Ariba's standard format for exchanging XML documents.
xCBL	Commerce One's standard format for exchanging XML documents.
HTTP	Hypertext Transfer Protocol. HTTP is a request/response protocol between clients and servers.

Setting Up the Integration to the Oracle Business Network

Complete the following tasks within PeopleSoft to enable the integration between PeopleSoft eProcurement and eSettlements to OBN.

1. Review the EDX PO Dispatch Types page. The sample data contains the EDX PO Dispatch Type of *OAG72* for dispatching purchase orders to the Oracle Business Network. Review this information and make any changes necessary for your environment.
2. Use the Linked Suppliers page to connect PeopleSoft suppliers to OBN suppliers. For each supplier, you can define the EDX PO dispatch type *OAG72* (for OBN suppliers) and define OBN information to enable the connection.
3. In the PeopleSoft Integration Broker, review and activate the service operations used to integrate PeopleSoft to OBN.
4. Create a node to connect to the Oracle Business Network. The PeopleSoft system is delivered with the `PSFT_ORACLE_SUPPLIER_NETWORK` node for the Oracle Business Network.

See *PeopleTools: Integration Broker*, "Adding and Configuring Nodes".

5. Activate a routing to be used with the node. The PeopleSoft system is delivered with routings for the service operation needed to integrate with OBN. These routings contain the transformation programs needed to convert messages from OAG to PSXML and vice versa. These routings can be altered to fit your environment.

See *PeopleTools: Integration Broker*, "Managing Routing Definitions".

6. Review or change queue definitions. The PeopleSoft system is delivered with queues for the service operation needed to integrate with OBN.

See *PeopleTools: Integration Broker*, "Managing Service Operation Queues".

7. Setup node connectors. The PeopleSoft system is delivered with the fscm_epo_OSNListeningConnector connector.

PeopleSoft users can leverage OBN's Transaction Monitor to view message statuses and errors, use self-service tools to connect to OBN, and test the ability to transmit inbound and outbound documents. Users can receive notifications of incoming messages that are applicable to them. For example, PeopleSoft eSettlements administrators can receive alerts for inbound invoices only.

Pages Used to Setup the Integration to the Oracle Business Network

Page Name	Definition Name	Usage
<u>Direct Connect Methods Page</u>	PV_DC_TYPE	Define direct connect integration methods and standards.
<u>EDX PO Dispatch Types Page</u>	PV_EDX_TYPE	Define dynamic dispatch types for EDX purchase orders. For dispatching purchase orders to the Oracle Business Network, use the EDX PO Dispatch Type of <i>OAG72</i> .
<u>Linked Suppliers Page</u>	PV_MS_SEC_SUPPLIER	Link suppliers from other systems (including OBN) to PeopleSoft suppliers.
<u>Service Operations - General Page</u>	IB_SERVICE	Activate service operations.
<u>Node Definitions Page</u>	IB_NODE	Create or change a node. The PeopleSoft system is delivered with the PSFT_ORACLE_SUPPLIER_NETWORK node for the Oracle Business Network. <i>PeopleTools: Integration Broker, "Adding and Configuring Nodes".</i>
<u>Routing Definitions Page</u>	IB_ROUTINGDEFN	Activate the routing that is used with the node. <i>PeopleTools: Integration Broker, "Managing Routing Definitions".</i>
<u>Routings - Parameters Page</u>	IB_ROUTINGDEFNDOC	Set up routing parameters including transformation programs. <i>PeopleTools: Integration Broker, "Managing Routing Definitions".</i>

Page Name	Definition Name	Usage
Queue Definitions Page	IB_QUEUEDEFN	Create or change queue definitions. <i>PeopleTools: Integration Broker, "Managing Service Operation Queues".</i> PeopleTools > Integration Broker > Integration Setup > Queues
<u>Connectors Page</u>	IB_NODECONN	Set up node connectors. This page enables you to associate gateways and connectors to a node. <i>PeopleTools: Integration Broker, "Using the Integration Broker Connector SDK".</i>

Activating the Service Operations

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

To setup these service operations use the information in this table and refer to the setup instruction in “Setting Up Service Operations” (PeopleSoft Supply Chain Management Integration) .

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
PV_ORDER	Outbound Asynchronous		No	Oracle Business Network
PURCHASE_ORDER_ACKNOWLEDGEMENT	Inbound Asynchronous	PurchaseOrder Acknowledgement	No	Oracle Business Network
ADVANCED_SHIPPING_RECEIPT	Inbound Asynchronous	AdvancedShipping Receipt	No	Oracle Business Network
EM_VOUCHER_IN	Inbound Asynchronous	EmVoucherIn	No	Oracle Business Network
PV_DC_OBN_REQST	Outbound Synchronous		No	Oracle Business Network

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
PV_CATALOG_SYNC	Inbound Asynchronous	PV_CAT_SYNC	No	Oracle Business Network

PeopleTools: Integration Broker

Related Links

“Setting Up Service Operations” (PeopleSoft Supply Chain Management Integration)

Sending Purchase Orders and Change Order to the Oracle Business Network

Purchase orders can be sent to OBN suppliers using the following steps:

1. The purchase orders are created and approved in either PeopleSoft eProcurement or PeopleSoft Purchasing. Attachments can be included with the purchase orders at either the header level or line level.
2. The purchase orders are dispatched to an OBN supplier using the electronic data exchange (EDX) method in either PeopleSoft eProcurement or PeopleSoft Purchasing. The dispatch process places the purchase orders in the PeopleSoft outbound staging tables.
3. The PeopleSoft Integration Broker picks up the purchase order data in the outbound staging tables and uses the service operation PV_ORDER to create the message. The routing on the service operation contains the transformation program PV_ORD_OAG that converts the purchase order from PSXML to OAG XML.
4. The connector address, fscm_epo_OSNListeningConnector, receives the XML message from PeopleSoft eProcurement, wrap the final message in a multipart MIME envelope, and then ships the message to OBN. This connector is also responsible for handling PO attachments and including them with the corresponding purchase order in the message to OBN.
5. The Oracle Business Network passes the purchase order to the OBN supplier.

Change orders follow the same business process flow but only the modified lines are sent to OBN and the XML document indicates that this is a change order instead of a purchase order.

In order to send a PeopleSoft purchase order or change order to the Oracle Business Network, the OBN supplier must be defined on the Linked Supplier page with a EDX PO Dispatch Type of OAG72. The OBN supplier ID and supplier type are also on this page to link the PeopleSoft supplier ID to the OBN supplier.

The PeopleSoft system is delivered with the following setup for transmitting purchase orders to OBN, this data may need to be altered for your environment:

- Service operation: PV_ORDER

- Message: PV_ORDER version 1
- Application Engine transformation program: PV_ORD_OAG
- Routing: ORACLE_SN_ORDER
- Node: PSFT_ORACLE_SUPPLIER_NETWORK
- Queue: PV_MS_ORD_DISPATCH
- Connector: fscm_epo_OSNListeningConnector.

PeopleSoft Service Operation	OBN Transaction Name	cXML Equivalent
PV_ORDER	OAG Process PO 007	cXML Order Request
PV_ORDER	OAG Change PO 006	cXML Order Request (update)

See [Understanding Purchase Order Dispatch](#).

Receiving Purchase Order Acknowledgements from the Oracle Business Network

Purchase order acknowledgements (POAs) can be sent from OBN suppliers to PeopleSoft using the following steps:

1. The Oracle Business Network transmits the POAs from the OBN supplier.
2. The PeopleSoft connector, fscm_epo_OSNListeningConnector, catches the inbound message which is routed to the PURCHASE_ORDER_ACKNOWLEDGEMENT service operation.
3. The routing on the service operation contains the transformation program SAC_OAG72POA that converts the POAs from OAG XML to PSXML.
4. The handler PurchaseOrderAcknowledgement, that is defined on the service operation, is executed to update the POA tables in PeopleSoft.
5. POAs can be reviewed on the Manage PO Acknowledgements page in PeopleSoft (Purchasing, Purchase Orders, Acknowledgements, Manage PO Acknowledgements).
6. If the POA results in changes, a change order may be generated.

There are two options for receiving a purchase order acknowledgement from the supplier. The first is a POA which uses the PeopleSoft Purchasing functionality, and stores the status within Purchasing tables. The second is the POR (purchase order response) where you can view the status from the PO Dispatch Message page (eProcurement, Buyer Center, Dispatch Purchase Order, Dispatch Message Log).

The PeopleSoft system is delivered with the following setup for receiving purchase order acknowledgements from OBN, this data may need to be altered for your environment:

- Service operation: PURCHASE_ORDER_ACKNOWLEDGEMENT

- Message: PURCHASE_ORDER_ACKNOWLEDGEMENT version 1
- Application Engine transformation program: SAC_OAG72POA
- Routing: ORACLE_SN_POA
- Node: PSFT_ORACLE_SUPPLIER_NETWORK
- Queue: PURCHASE_ORDER
- Handler: PurchaseOrderAcknowledgement
- Connector: fscm_epo_OSNListeningConnector.

<i>PeopleSoft Service Operation</i>	<i>OBN Transaction Name</i>	<i>cXML Equivalent</i>
PURCHASE_ORDER_ACKNOWLEDGEMENT	OAG Acknowledge PO 008	cXML Confirmation Request
PURCHASE_ORDER_ACKNOWLEDGEMENT	OAG Change Sales Order 008	(no cXML equivalent)

Receiving Advanced Shipment Notifications from the Oracle Business Network

Advanced shipping notifications (ASNs) can be sent from OBN suppliers to PeopleSoft where they are received as advanced shipping receipts (ASRs). The following steps are used:

1. The Oracle Business Network transmits the advanced shipping notifications from the OBN supplier.
2. The PeopleSoft connector, fscm_epo_OSNListeningConnector, catches the inbound message which is routed to the ADVANCED_SHIPPING_RECEIPT service operation.
3. The routing on the service operation contains the transformation program SAC_OAG72ASN that converts the ASNs in OAG XML to the ASRs in PSXML.
4. The handler AdvancedShippingReceipt, that is defined on the service operation, is executed to update the Receipt Load tables in PeopleSoft.
5. The Receipt Loader process is then executed to create a receipt, which may then be approved by an administrator.
6. ASRs can be reviewed on the ASR Review page in PeopleSoft.

Note: A link to the PeopleSoft eSettlements application and to the PeopleSoft eSupplier Connection application is provided within the Oracle Business Network on the Trading Partners section.

The PeopleSoft system is delivered with the following setup for receiving ASNs from OBN, this data may need to be altered for your environment:

- Service operation: ADVANCED_SHIPPING_RECEIPT

- Message: ADVANCED_SHIPPING_RECEIPT version 2
- Application Engine transformation program: SAC_OAG72ASN
- Routing: ORACLE_SN_ASN
- Node: PSFT_ORACLE_SUPPLIER_NETWORK
- Queue: ADVANCED_SHIPPING_NOTICE
- Handler: AdvancedShippingReceipt
- Connector: fscm_epo_OSNListeningConnector.

<i>PeopleSoft Service Operation</i>	<i>OBN Transaction Name</i>	<i>cXML Equivalent</i>
ADVANCED_SHIPPING_RECEIPT	OAG Show Shipment 005	cXML Ship Notice Request

Pages Used to Receive Advanced Shipment Notifications from the Oracle Business Network

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Load Purchase Order Receipts Page	RUN_RECVLOAD	Run the Receipt Load Application Engine process (PO_RECVLOAD) to load receipt data from the PeopleSoft staging tables into the PeopleSoft Purchasing records. Purchasing > Receipts > Load Receipts
ASR Review Page	RECV_AOLN_EC	Access information about receipts received using the ADVANCED_SHIPPING_RECEIPT Enterprise Integration Point (EIP) or created by supplier-entered ASNs. Purchasing > Receipts > Review Receipt Information > Advanced Shipment Receipts > ASR Review

Receiving Invoices from the Oracle Business Network

Invoices can be transmitted from OBN suppliers to PeopleSoft where they are received as vouchers in PeopleSoft Payables through PeopleSoft eSettlements. The following steps are used:

1. The Oracle Business Network transmits the invoice from the OBN supplier.

2. The PeopleSoft connector, `fscm_epo_OSNListeningConnector`, catches the inbound message which is routed to the `EM_VOUCHER_IN` service operation.
3. The routing on the service operation contains the transformation program `SAC_OAG72INV` that converts the invoices in OAG XML to vouchers in PSXML.
4. The handler `EmVoucherIn`, that is defined on the service operation, is executed to update the voucher staging tables in PeopleSoft.
5. The Voucher Build process is then executed to create a voucher.
6. The Voucher Inquiry page can be used to review vouchers.

Note: In order to receive invoices from OBN suppliers, PeopleSoft Payables and PeopleSoft eSettlements must be installed. A link to the PeopleSoft eSettlements application and to the PeopleSoft eSupplier Connection application is provided within the Oracle Business Network on the Trading Partners section.

The PeopleSoft system is delivered with the following setup for receiving invoices from OBN, this data may need to be altered for your environment:

- Service operation: `EM_VOUCHER_IN`
- Message: `EM_VOUCHER_IN` version 1
- Application Engine transformation program: `SAC_OAG72INV`
- Routing: `ORACLE_SN_VOUCHER_IN`.
- Node: `PSFT_ORACLE_SUPPLIER_NETWORK`
- Queue: `EM_VOUCHER_IN`
- Handler: `EmVoucherIn`
- Connector: `fscm_epo_OSNListeningConnector`.

<i>PeopleSoft Service Operation</i>	<i>OBN Transaction Name</i>	<i>Description</i>
EM_VOUCHER_IN	OAG Process Invoice 002	PeopleSoft eSettlements receives XML Invoice Detail

Pages Used to Receive Invoices from the Oracle Business Network

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
“Voucher Build Page” (PeopleSoft Payables)	VCHR_BATCH_RQST	Run this process to create voucher record sets from many sources including XML invoices.

Page Name	Definition Name	Usage
Voucher Inquiry Page	AP_VOUCHER_INQUIRY	Search for and review vouchers and any payment information. Accounts Payable > Review Accounts Payable Info > Vouchers > Voucher > Voucher Inquiry

Configuring Service Operations for Punchout via OBN

You need to configure the PV_DC_OBN_REQST Service operation for Punchout via OBN (Oracle Business Network).

The PeopleSoft system is delivered with the following setup for Punchout via OBN, this data may need to be altered for your environment:

Service operation: PV_DC_OBN_REQST

Message: PV_DC_OBN_REQST.VERSION_1 and PV_DC_OBN_RESP.VERSION_1

Application Engine transformation program: PV_DC_OBNREQ and PV_DC_OBNRSP

Routing: PV_DC_OBN_REQST

Node: PSFT_ORACLE_SUPPLIER_NETWORK

Connector: fscm_epo_OSNListeningConnector.

Note: By default Routing is inactive. If the Routing is not activated for the service definition, select the corresponding check box and click Active Selected Routings.

For more details about Service Operations page, refer to the *Accessing and Viewing Service Operation Definitions* in PeopleTools documentation (*Integration Tools, Managing Service Operations, Accessing and Viewing Service Operation Definitions*).

To integrate supplier with OBN, refer to the [Setting Up OBN Supplier Integration with eProcurement](#).

Configuring Service Operations to Import External Catalog Using OBN

You need to configure the PV_CATALOG_SYNC Service operation to import external catalog using OBN (Oracle Business Network).

The PeopleSoft system is delivered with the following setup for importing external catalog using OBN, this data may need to be altered for your environment:

Service operation: PV_CATALOG_SYNC

Message: PV_CATALOG_SYNC.VERSION_1

Handler Name: PV_CAT_SYNC

Application Engine transformation program: PV_CAT_XSLT

Routing: PV_CATALOG_SYNC

Node: PSFT_ORACLE_SUPPLIER_NETWORK

Connector: fscm_epo_OSNListeningConnector.

Note: By default Routing is inactive. If the Routing is not activated for the service definition, select the corresponding check box and click Active Selected Routings.

For more details about Service Operations page, refer to the *Accessing and Viewing Service Operation Definitions* in PeopleTools documentation (*Integration Tools, Managing Service Operations, Accessing and Viewing Service Operation Definitions*).

To integrate supplier with OBN, refer to the [Setting Up OBN Supplier Integration with eProcurement](#).

To import and maintain external catalogs, refer to the [Maintain External Catalogs Page](#).

Integrating with a Marketplace

Understanding the Integration Between a Marketplace and PeopleSoft eProcurement

This overview discusses:

- Integration between a Marketplace and PeopleSoft eProcurement.
- Marketplace integration set up.
- Marketplace EIPs.

Integration Between a Marketplace and PeopleSoft eProcurement

A Marketplace is an electronic trading community in which buyers and sellers use a common internet portal. Integrating the eProcurement system with Marketplace suppliers enables you to review the latest supplier catalogs and prices in a Marketplace, and then download these catalogs into eProcurement. When you connect to a Marketplace with eProcurement, you can:

- Load or update items from a Marketplace into eProcurement catalogs and use these items on eProcurement requisitions and purchase orders.
- Pass purchase orders and change orders that are created in eProcurement to a Marketplace where suppliers receive the orders and review them.
- Pass the supplier's response to the purchase order from a Marketplace to eProcurement.

In a Marketplace, if you are using xCBL 2.0 or Business Interlinks, the supplier responds by accepting or rejecting the purchase order. This response is passed to eProcurement where it is inserted in the PO Dispatch Message Log page. The status of the PO in eProcurement changes to *Dispatched*.

- Load or create a receipt using advanced shipment receipt (ASR).
- Load or create an voucher or invoice for the purchase order.
- Use the price check feature in eProcurement to update an item's price to match the current price in a Marketplace.

Users receive the latest price for an item, which is important when prices frequently fluctuate.

- Use the availability check feature in eProcurement to update an item's available quantity to match the supplier's available quantity in a Marketplace.

Users know before submitting an order whether stock is currently available.

- Use the order status feature in eProcurement to request the current status of the purchase orders submitted to a Marketplace.

Note: Not all suppliers support all features of this integration. For example, availability check will not work unless the supplier has integrated their inventory system with a Marketplace.

Marketplace Integration Set Up

To set up the connection between eProcurement and a Marketplace:

1. Set up Marketplace suppliers as suppliers, using the Supplier Information component.
2. Set up Marketplace suppliers as eProcurement suppliers, using a Marketplace Supplier Setup page.
3. Associate the SetID that is used in the eProcurement record group as a buyer in a Marketplace using the Marketplace Buyers - Buyer Setup pages.

Note: All transactions for eProcurement are stored by using the business unit as a key field. These business units are associated with the eProcurement record group (PV_01) by using a SetID on the Table Control - Record Group page. In order to pass transactions to a Marketplace, the SetIDs that are used must be defined as a Marketplace buyer using the Marketplace Buyers - Buyer Setup page.

Note: If you are using xCBL 2.0 or Business Interlinks, then you need to enter the internet address of the Integration Broker Gateway connector on the Buyer Setup page. If you use Integration Broker, the internet address is not required.

4. Synchronize shared data that is transferred between eProcurement and a Marketplace.

To prevent validation errors during the transfer of data between eProcurement and a Marketplace, ensure that common control data is identified by the same codes. This common data includes units of measure, currency codes, country codes, language codes, and so on.

Marketplace EIPs

To support integrated implementations in which you use a third-party system to acquire goods and services, eProcurement provides these enterprise integration points (EIP):

<i>Term</i>	<i>Definition</i>
PV_AVAIL_CHECK_REQ	Checks for the availability of items with a supplier.
PV_AVAIL_CHECK_RESP	The supplier responds with the availability of the items.
PV_MS_RESP_MSG	eProcurement PO response from a Marketplace.
PV_ORD_STS_REQ	Checks the order status with the external system.
PV_ORD_STS_RESP	eProcurement gets a response to the order status request.

Term	Definition
PV_PRICE_CHECK_REQ	Checks prices available from the Marketplace supplier.
PV_PRICE_CHECK_RESP	Gets the response to the price check request.

Prerequisites

Before integrating a Marketplace with eProcurement, all Marketplace suppliers to be used in eProcurement must be set up as PeopleSoft eProcurement suppliers.

See “Understanding Supplier Maintenance” (PeopleSoft Source to Settle Common Information)

Setting Up Marketplace Suppliers and Buyers

To set up linked suppliers for a Marketplace, use the Linked Supplier component (PV_MS_SUPPLIERS).

To set up Marketplace buyers and buyer options, use the Marketplace Buyers component.

This section discusses how to set up Marketplace suppliers, identify SetIDs to be defined as Marketplace buyers, set up Marketplace buyers, and define Marketplace buyer options.

Pages Used to Set Up Marketplace Suppliers and Buyers

Page Name	Definition Name	Usage
<u>Linked Suppliers Page</u>	PV_MS_SEC_SUPPLIER	Set up Marketplace suppliers as PeopleSoft suppliers.
<u>Marketplace Buyer Setup Page</u>	PV_MS_SEC_BUYER	Set up Marketplace buyers so that purchase orders, responses, and other information can be exchanged.
<u>Marketplace Buyer Options Page</u>	PV_MS_BUYER_OPT	Define Marketplace buyer options. Test the connection and view transmission logs between PeopleSoft eProcurement and a Marketplace. Test the sending and receiving of information including: purchase orders, price checks, availability checks, and order status checks.

Identifying SetIDs to be Defined as Marketplace Buyers

The Marketplace Buyers component enables you to define and test the connection to a Marketplace. The PeopleSoft eProcurement application is defined as a buyer within a Marketplace, so that information can be exchanged.

The SetID defines a Marketplace buyer, which is your eProcurement application. If you have multiple business units for PeopleSoft eProcurement, you might have multiple Marketplace buyers.

To determine the SetIDs that must be defined as Marketplace buyers:

1. Identify the Purchasing business units that are used to record eProcurement purchase orders and pass purchase orders to a Marketplace.
2. Access the Tableset Control - Record Group page.

In the **Set Control Value** field, enter the business unit. On the Tableset Control - Record Group page, identify the SetID that is used for the eProcurement record group, which is PV_01.

3. Use the Marketplace Buyers - Buyer Setup page to define a buyer for this SetID.

Related Links

“Purchasing Definition - Business Unit Options Page” (PeopleSoft Purchasing)

Marketplace Buyer Setup Page

Use the Marketplace Buyer Setup page (PV_MS_SEC_BUYER) to set up Marketplace buyers so that purchase orders, responses, and other information can be exchanged.

Navigation:

eProcurement > Administer Procurement

Click the **Maintain Supplier Integration** link.

Click the **Marketplace Buyers** link.

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

Buyer Setup Buyer Options

Marketplace Buyer Setup

SetID SHARE CORPORATE SETID

Buyer Setup

MarketPlace URL

MarketPlace Partner ID

Buyer User ID

Buyer Password

Gateway URL

[Return to Maintain Supplier Integration](#) [Return to Administer Procurement](#)

Define a Marketplace buyer for each SetID used to link a business unit to the PeopleSoft eProcurement record group PV_01.

Field or Control	Description
Marketplace URL (Marketplace uniform resource locator)	Enter the Marketplace internet address that is used by eProcurement to pass XML documents including; purchase orders, order status checks, and item price and availability checks. Note: If you are using xCBL 2.0 or Business Interlinks, then you need to enter this URL.
Marketplace Partner ID	Enter a 64-bit identifier assigned to every Marketplace enterprise-level trading partner. Participant IDs are defined by a Marketplace supplier and cannot be modified.
Buyer User ID	Enter a user ID that enables the trading partner to gain access to a Marketplace. PeopleSoft eProcurement is a trading partner with Marketplace suppliers.
Buyer Password	Enter the buyer's password.
Gateway URL (gateway uniform resource locator)	Enter the PeopleSoft gateway internet address to which it sends suppliers' responses. After these responses (which are formatted as XML documents) arrive at the PeopleSoft gateway, the system launches PeopleCode to update PeopleSoft eProcurement. Note: If you are using xCBL 2.0 or Business Interlinks, then you need to enter this URL.

Marketplace Buyer Options Page

Use the Marketplace Buyer Options page (PV_MS_BUYER_OPT) to define Marketplace buyer options.

Test the connection and view transmission logs between PeopleSoft eProcurement and a Marketplace. Test the sending and receiving of information including: purchase orders, price checks, availability checks, and order status checks.

Navigation:

From the Marketplace Buyer Setup page, click the **Buyer Options** tab.

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

Buyer Setup

Buyer Options

Marketplace Buyer Options

SetID SHARE CORPORATE SETID

Log Files

Log File Location

File Type

Price Check

View Request

View Response

Test MarketPlace Connectivity

Item ID

PO Number

Price

Availability

Status

Note: In order to have read or write access to the log files, the log file location must be accessible by the application server, process scheduler server, and the client. Write access should be granted to the application server and the process scheduler server. The client servers should have read access.

Log Files

Field or Control	Description
File Type	Select the type of log file that you want to view. Values are: <i>Availability Check:</i> This file is generated when PeopleSoft eProcurement users compare the supplier's available quantity to the requisition quantity. If the quantity requested exceeds the available quantity, a message appears giving the user an opportunity to change the requisition quantity. Click the Check Price and Availability button on the Search Catalog - Item Description page to launch this action. You can launch this action using the Test Marketplace Connectivity section of this page. <i>Order Status Check:</i> This file is generated when PeopleSoft eProcurement users request the current status of the purchase orders they submitted to a Marketplace. Click the Get Market Order Status button on the PO Dispatch Message Log page or select Run Order Status Check on the Process Marketplace Orders Process page to launch this action. You can launch this action using the Test Marketplace Connectivity section of this page. <i>Price Check:</i> This file is generated when PeopleSoft eProcurement users update an item's price to match the current price in a Marketplace. Click the Check Price and Availability button on the Search Catalog - Item Description page to launch this action. You can launch this action using the Test Marketplace Connectivity section of this page. <i>Purchase Order:</i> This file is generated when purchase orders created in PeopleSoft eProcurement are transmitted to a Marketplace. You can launch this action by running the Process Marketplace Orders process.
View Request	Select to review the log file generated when sending the data transmission to a Marketplace. This XML data can be used to help debug problems with transmitting data to a Marketplace. The type of log file is based on the selection in the File Type field. The system displays the last transmission of this file type located in the directory entered in the Log File Location field.

Field or Control	Description
View Response	Select to review the log file generated when a Marketplace sends a response to PeopleSoft eProcurement. This XML data can be used to help debug problems with transmitting data from a Marketplace. The type of log file that appears is based on the selection in the File Type field. The system displays the last transmission of this file type located in the directory entered in the Log File Location field. If you use Integration Broker and select the file type <i>Purchase Order</i> , the log file does not contain any information, since the purchase order action is an asynchronous transmission and no response is received from a Marketplace.

Test Marketplace Connectivity

Field or Control	Description
Price	Select to launch a price check, which instantly updates an item's price to match the current price in a Marketplace. The item entered in the Item ID field is used for this price check. The system generates a transmission log and stores it in the directory entered in the Log File Location field.
Availability	Select to launch an availability check, which retrieves the supplier's available quantity from a Marketplace. The item entered in the Item ID field is used for this availability check. A transmission log is generated and stored in the directory entered in the Log File Location field.
Status	Select to launch an order status check, which retrieves the current status of a purchase order within a Marketplace. The purchase order entered in the Purchase Order field is used for this order status check. A transmission log is generated and stored in the directory entered in the Log File Location field.

Related Links

[Understanding Purchase Order Dispatch](#)

[Understanding Requisitions](#)

Setting Up Integration with a Marketplace

This section provides an overview of the Integration Broker between a Marketplace and eProcurement and discusses how to set up nodes, activate routings, and activate service operations.

Pages Used to Set Up Integration with a Marketplace

Page Name	Definition Name	Usage
<u>Service Operations - General Page</u>	IB_SERVICE	Activate service operations.
<u>Routing Definitions Page</u>	IB_ROUTINGDEFN	Activate the routing that is used with the node. <i>PeopleTools: Integration Broker, "Managing Routing Definitions".</i>

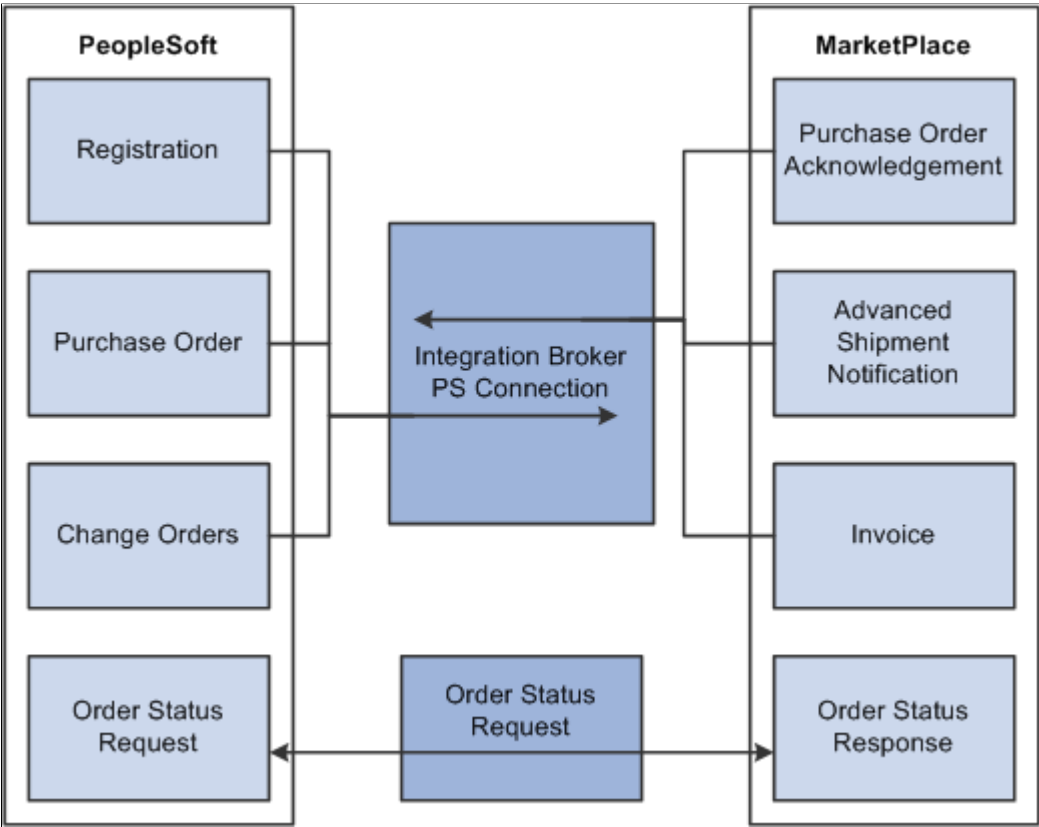
Understanding the Integration between a Marketplace and eProcurement

PeopleSoft integrates to a Marketplace to:

- Enable companies to easily register with Marketplaces.
- Create requisitions within eProcurement, while viewing catalogs in the Marketplace.
- Enable suppliers to send Purchase Order Acknowledgements (POA).
- Enable suppliers to send Advanced Shipment Notifications (ASN).
- Generate receipts when Advanced Shipment Receipts (ASR) are received.
- Enable suppliers to send invoices to the company, if you are using PeopleSoft Payables.
- Create vouchers for inbound invoices.

This diagram illustrates the flow of information from PeopleSoft, through the Integration Broker, and to the Marketplace. Data such as registration, purchase orders, and change orders flow from PeopleSoft to Marketplace. Data such as PO acknowledgements, advanced shipment notices, and invoices flow from Marketplace to PeopleSoft. Order status requests can flow between PeopleSoft and Marketplace:

This diagram illustrates the flow of information from PeopleSoft, through the Integration Broker, and to the Marketplace.



Understanding Setup Steps for Marketplace Integration

This section lists the steps that are required to integrate with a Marketplace:

To utilize the purchase order acknowledgement, advanced shipment notification, and invoice transaction capabilities, the administrator needs to configure the Integration Broker. These elements need to be set up:

- 1. Activate the service operation.
- 2. Activate the routing.

Integration Broker works within the PeopleSoft system to send and receive information to and from external systems, such as the Marketplace. In this case, the job of the Integration Broker is to send and receive documents that come to and from the Marketplace. The purpose of the Integration Broker is to aid in the translation of the xCBL 3.0 documents used by the Marketplace into the PSXML format that the PeopleSoft system recognizes. Integration Broker accomplishes this translation by using a combination of nodes, routings, and service operations.

Integration Broker Component	Purpose
Service Operation	The service operation is a template for the data that the application sends and receives.

Integration Broker Component	Purpose
Routing	The route tells the system how the Marketplace works with PeopleSoft eProcurement. Details include what service operation to use for the two systems to communicate, and what Application Engine translation to use to translate the format from xCBL 3.0 to the PeopleSoft format.

Activating Service Operations

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

To setup this service operation use the information in this table and refer to the setup instruction in “Setting Up Service Operations” (PeopleSoft Supply Chain Management Integration) .

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
PV_AVAIL_CHECK_REQ	Outbound Synchronous		No	third-party system
PV_AVAIL_CHECK_RESP	Inbound Asynchronous		No	third-party system
PV_MS_RESP_MSG	Inbound Asynchronous	PvMsRespMsg	No	third-party system
PV_ORDER	Outbound Asynchronous		No	third-party system
PV_ORDER_REQ	Outbound Synchronous		No	third-party system
PV_ORD_STS_REQ	Outbound Synchronous		No	third-party system
PV_ORD_STS_RESP	Inbound Asynchronous		No	third-party system

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
PV_PRICE_CHECK_REQ	Outbound Synchronous		No	third-party system
PV_PRICE_CHECK_RESP	Inbound Asynchronous		No	third-party system

PeopleTools: Integration Broker

Related Links

“Setting Up Service Operations” (PeopleSoft Supply Chain Management Integration)

Routing Definitions Page

Use the Routing Definitions page (IB_ROUTINGDEFN) to activate the routing that is used with the node.

Navigation:

- eProcurement, Administer Procurement, Maintain Supplier Integration, Integration Broker Routing Definitions
- PeopleTools, Integration Broker, Integration Setup, Routings

This section discusses how to Activate Marketplace routings.

Activating Marketplace Routings

Activate the Marketplace routings.

Loading Marketplace Catalog Items into PeopleSoft eProcurement

This section provides an overview of loading Marketplace items into PeopleSoft eProcurement and discusses how to download supplier flat files, extract data from a CUP file, export CUP data, load CUP files, define item import defaults, validate and process imported items, edit imported item categories, maintain imported item statuses, load Marketplace items, correct inventory item load errors, and download item attachments.

Understanding Loading Marketplace Items into PeopleSoft eProcurement

After you set up connections to a Marketplace, you can load items from Marketplace catalogs into PeopleSoft eProcurement. The items can be loaded into the item master tables or into an express catalog. This topic discusses loading items into the item master tables of PeopleSoft.

For information on the express catalog option, see [Setting Up and Using the Express Catalog](#).

When Marketplace items are loaded into the PeopleSoft item master tables, they can be entered on eProcurement requisitions and purchase orders. You can also update prices and check available quantities for Marketplace items in PeopleSoft eProcurement. After you load the items, you should schedule regular updates to capture changes such as price changes, discontinuation of items, or the addition of new items.

To load a CUP (catalog update process) file into the system, complete these steps:

1. Import the product and price files to PeopleSoft eProcurement using the Import CUP File process (PV_CUP_LOAD).

This application engine process loads the product and price flat files into the PV_CP_LOAD and PV_CP_CAT_TMP staging tables. The attachment file is loaded into the PV_CP_ITM_XREF table.

2. Use the Validate and Process Imported Items page to validate the CUP file data in the staging tables, adding or changing information as necessary.
3. Use the Edit CUP Item Categories page to review any new item categories added for the items loaded from a Marketplace.

Each new item category requires a default account (the top level of the PeopleSoft ChartFields). This account is used to record the accounting entries created by ordering items in this item category.

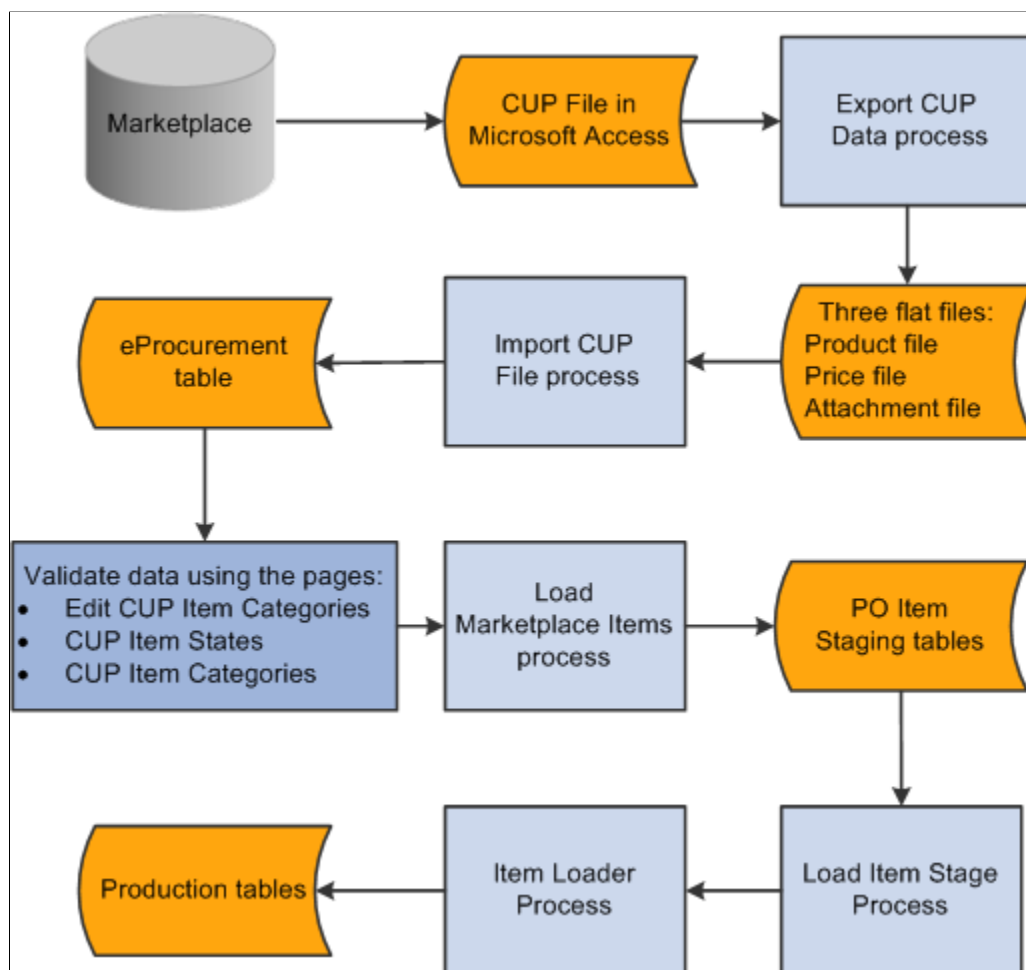
4. Review the CUP status of the item on the CUP Items Status page.
5. When loading non-inventory items, be sure to enter a cost element in the Item Default Values page for the applicable SetID. This cost element is used as the default cost element for the new items created by the Load Marketplace Items process.
6. Run the Load Marketplace Items process (PV_CP_ITM_LOAD).

This process loads items with a status of *Ready to Build Items* (new items) or *Items to be Updated* from the staging tables into the PeopleSoft Item Master tables.

7. Use the Data Definition Maintenance page to review any errors for items that were not loaded properly.

Select the ITEM transaction type and enter the SetID for the items. Select the stage table option with an *Error* status and then click the **Query** button. Any errors appear at the bottom of the page.

This diagram illustrates the process of loading Marketplace items into PeopleSoft eProcurement by creating a CUP file and then loading the data into the PeopleSoft production tables:



To set up the system to use the CUP Load process, you need to complete these tasks:

1. Provide locations for the product, price, and attachment files from the supplier.
2. Load the CUP file to extract the data from the input files and place them in the Inventory tables.
3. Provide item defaults, such as account number and currency information.
4. Validate items being imported into the PeopleSoft system.
5. Correct errors that may occur in the extraction process.

Pages Used to Load Marketplace Catalog Items into PeopleSoft eProcurement

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Procurement Catalog Load Page</u>	PV_CP_IMPORT_RUN	Import CUP files by loading data from the flat files created by the Export CUP File process into the PeopleSoft eProcurement tables.
<u>Item Defaults Page</u>	PV_CP_RUN_DEFAULTS	Define item import defaults.
<u>Validate and Process Imported Items Page</u>	PV_CP_PROCESS	Validate and process imported items loaded by the Import CUP File process page into the staging tables PV_CP_LOAD and PV_CP_CAT_TMP.
<u>Edit Imported Item Categories Page</u>	PV_CP_CATEGORIES	Edit imported item categories for the items loaded from a Marketplace.
<u>Imported Item Status Page</u>	PV_CP_STATUS	Maintain CUP item statuses in the PV_CP_LOAD and PV_CP_CAT_TMP staging tables, correct errors, add more details, and change the item status.
<u>Item Defaults Page</u>	INV_ITEM_DEFAULTS	For non-inventory items, enter a cost element in the Item Default Values page for the applicable SetID. This cost element is used as the default cost element for the new items created by the Load Marketplace Items process.
<u>Load Item Catalogs Page</u>	PV_CP_ITM_LOAD	Load Marketplace items into PeopleSoft item tables. The data is loaded from the PV_CP_LOAD and PV_CP_CAT_TMP staging tables to the production tables for PeopleSoft items.
<u>Data Definition Maintenance Page</u>	EO_EIP_CTL_MAINT	Correct inventory item load errors.

Downloading Supplier Flat Files

The PeopleSoft system will search for three files needed to successfully move the supplier data into the PeopleSoft Inventory tables. These three files are:

- A product file containing item information.
- A price file containing pricing information.
- An attachment file containing information about the attachments for each item.

Related Links

[Understanding Supplier Data](#)

Extracting Data From a CUP File

Not all data in the CUP file is retrieved; only the information needed by PeopleSoft is retrieved. This Visual Basic (VB) program is delivered with PeopleSoft eProcurement.

PeopleSoft retrieves this information from a CUP file:

Item Information (Product File)

Table	Field	Data Retrieved
Cup_CatUpdate	CreateDate	The item's creation date.
Cup_SupplierPartnerID	The supplier's identification code.	
EffectiveDate	The item's effective date.	
Cup_Partner	TPName	The buyer's trading partner name.
Cup_Partner	TPID	The buyer's trading partner identification.
Cup_PartUpdate	Cup_PartUpdateID	The part update identification code.
ActionCode	The code identifying the action to be performed on this item. The options are: <i>A</i> (add a new item); <i>D</i> (delete an item); or <i>M</i> (modify an existing item).	
PartNum	The item's part number.	
PartNumExt	The part number extension.	
UOM	The unit of measure in which the item is purchased.	

Table	Field	Data Retrieved
Cup_PartUpdateCommodity	CatLevel1, CatLevel2, CatLevel3, and CatLevel4.	The description of the UN/SPSC codes assigned to the item in the AcctLevel1, AcctLevel2, AcctLevel3, and AcctLevel4 fields. The first 30 characters of this field are used for the item category description in the PeopleSoft table ITM_CAT_TBL.
AcctLevel1, AcctLevel2, AcctLevel3, and AcctLevel4.	The four levels of UN/SPSC codes for the item. These codes are used to categorize the items within a catalog (PeopleSoft tree). All four levels are mandatory; if they are not already in the CUP file, enter them manually on the CUP Item Categories page.	
Cup_PartUpdateDesc	ShortDesc	The short description for the item. The value in this field is used to populate several item description fields in PeopleSoft's item tables, including DESCRSHORT (first 10 characters), DESCR (first 30 characters), DESCR60 (first 60 characters), and DESCR_254MIXED (254 characters).
LongDesc	A longer description for the item that is loaded into the PeopleSoft eProcurement cross-reference table, PV_CP_ITM_XREF. This description appears on the Search Catalog - Item Description page and on the Requisition Summary - Item Description page.	
Cup_PartUpdateInfo	MfrPartNum	The manufacturer's part number for the item.
MfrName	The item manufacturer's name.	
LeadTime	The lead time required to deliver the item.	
UnitPrice	The item's price per unit.	

Table	Field	Data Retrieved
Cup_Price	CurrencyCode	The currency in which the item's base price is expressed.
QtyMin	The minimum quantity of the item that can be purchased.	

This is an example of the product file generated:

^1^,^08/13/2012^,^A^,^8^,^h8aabb80-abcd-1234-12ed-as1230123012^,^SupplierABC^,^0121-0002^,^^,^EA ^,^9.828^,^0121-0002^,^XYZ Mfg. Co., Inc.^,^Structures, Building and Construction Components and Supplies^,^Electrical components and supplies^,^Switches, controls, and relays^,^Other^,^30^,^21^,^19^,^00^,^^,^USD^,^^,^^,^Battery Handle Switch, Dpdt15a^,^Battery Handle Switch, Dpdt15a^

^2^,^08/13/2012^,^A^,^8^,^h8aabb80-abcd-1234-12ed-as1230123012^,^ SupplierABC ^,^0121-0006^,^^,^EA ^,^20.605^,^0121-0006^,^XYZ Mfg. Co., Inc.^,^Structures, Building and Construction Components and Supplies^,^Electrical components and supplies^,^Switches, controls, and relays^,^Other^,^30^,^21^,^19^,^00^,^^,^USD^,^^,^^,^Battery Handle Switch, Dpdt15a^,^Battery Handle Switch, Dpdt15a^

^3^,^08/13/2012^,^A^,^8^,^h8aabb80-abcd-1234-12ed-as1230123012^,^ SupplierABC ^,^0121-0009^,^^,^EA ^,^6.695^,^0121-0009^,^XYZ Mfg. Co., Inc.^,^Structures, Building and Construction Components and Supplies^,^Electrical components and supplies^,^Switches, controls, and relays^,^Other^,^30^,^21^,^19^,^00^,^^,^USD^,^^,^^,^Battery Handle Switch, Dpdt15a^,^Battery Handle Switch, Dpdt15a^

The data retrieved above will be mapped into PeopleSoft fields as follows:

Field Name
PV_CP_SEQ_ID
PV_CP_CREATE_DATE
PV_CP_ACTION
PV_CP_SUPPLIER_ID
PV_MS_SUP_MPID
PV_CP_TP_NAME
PV_CP_SPN

Field Name
PV_CP_PART_EXT
PV_CP_UOM
PV_CP_LIST_PRICE
PV_CP_MPN
PV_CP_MFR_NAME
PV_CP_CAT_LEVEL1
PV_CP_CAT_LEVEL2
PV_CP_CAT_LEVEL3
PV_CP_CAT_LEVEL4
PV_CP_ACCT_LEVEL1
PV_CP_ACCT_LEVEL2
PV_CP_ACCT_LEVEL3
PV_CP_ACCT_LEVEL4
PV_CP_LEAD_TIME
PV_CP_CURRENCY_CD
PV_CP_EFFDT
PV_CP_QTY_MIN
PV_CP_SHORT_DESCR
PV_CP_DESC1

Field Name
SETID
INV_ITEM_ID
PV_CP_ITM_KEY
CATEGORY_CD
MFG_ID
MFG_ITM_ID
PV_CP_PROCESS_DT
ECQUEUEINSTANCE
EIP_CTL_ID
VENDOR_SETID
VENDOR_ID
ACCOUNT
PV_CP_APPROVE_FLG
PV_CP_ITM_STATUS

Pricing Information (Price File)

Table	Field	Data Retrieved
Cup_CatUpdate	Cup_SupplierPartnerID	The supplier's identification code.
Cup_Partner	TPName	The buyer's trading partner identification.

Table	Field	Data Retrieved
Cup_PartPrice	ActionCode	The action to be performed on this item. The values are: <i>A</i> (add a new item); <i>D</i> (delete an item); or <i>M</i> (modify an existing item).
PartNum	The item's part number.	
PartNumExt	The part number's extension.	
UOM	The unit of measure in which the item is purchased.	
Cup_Price	UnitPrice	The item's price per unit.
CurrencyCode	The currency in which the item's base price is expressed.	
EffectiveDate	The item price's effective date.	
ExpireDate	The item price's expiration date.	
QtyMin	The minimum quantity of the item that can be purchased.	

Note: The item's long description is loaded from the CUP file into a cross-reference table called PV_CP_ITM_XREF, and the item's image is loaded into a web server directory. The description and image both appear when you view the item in PeopleSoft eProcurement.

Procurement Catalog Load Page

Use the Procurement Catalog Load page (PV_CP_IMPORT_RUN) to import CUP files by loading data from the flat files created by the Export CUP File process into the PeopleSoft eProcurement tables.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Import Item Catalog File

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

Note: The product and price files are loaded into the staging tables PV_CP_LOAD and PV_CP_CAT_TMP. This process adds certain defaults that were not in Marketplace catalog tables to required fields in PeopleSoft's Item tables. The attachment file is loaded into the table PV_CP_ITM_XREF.

Import Catalog Items

Field or Control	Description
Source	Enter the source that provides the data.
Item SetID	Enter the SetID that the system uses in the item table.
Supplier SetID	Enter the SetID that the system uses in the supplier table.
Product File	Enter the location and name of the flat file containing the item details. The product file must be accessible from the PeopleSoft Process Scheduler server.

Field or Control	Description
Attachment File	Enter the location and name of the flat file containing cross-references to images and attachments for the items. PeopleSoft enables you to store and retrieve attachments to an ftp server. The flat file cross-references the names and extensions of each attachment to the corresponding item ID. The attachment can be a Microsoft Word file or Excel spreadsheet for example. Requesters and buyers can view these attachments. The attachment is automatically added to the PO that is created from the requisition and can be sent to the supplier.
Price File	Enter the file location and name of the flat file containing the pricing details for the items. The price file must be accessible from the process scheduler server.
Tree Name	Enter the PeopleSoft tree (item catalog) to be used when this process loads the new categories from the CUP file. If you leave this field blank, the value appears by default from the eProcurement Installation Options page. To ensure that this item catalog is accessible to the user creating requisitions, either add the catalog to the Requester Setup page or clear any catalog restrictions for the requestor.

Note: Before running this process, verify the settings for requiring item approval. If you select the **Item Approval Required** check box on the Installation Options - Overall/GL page, all items that you load require approval. If you are loading thousands of items, you might not want to approve each item individually.

Options

Field or Control	Description
Run Item Load	Select to indicate that you want the system to load catalog items automatically as soon as it runs the CUP load.
Tree Name	Select the tree name that is used to store the category hierarchy.
Language	Select the language in which the items are to be stored.
Inactive Level	Select the level at which you want to inactivate to make the item not active. Values include the <i>Item Supplier</i> or at the <i>Item Supplier Price</i> level.

Field or Control	Description
Process Imported Items	Click to access the Validate and Process Imported Items page where you can work with imported items before loading them.

The Run Load process loads the data from the PV_CP_LOAD and PV_CP_CAT_TMP staging tables to the production tables for PeopleSoft items.

The process of loading data includes four steps:

1. The Build PeopleSoft Items process (PV_CP_ITM_LOAD) adds new item categories and then loads Marketplace CUP items into the PO item staging tables (ITM_LOAD_MST_EC, ITM_LOAD_INV_EC, ITM_LOAD_PUR_EC, and ITM_LOAD_VND_EC).
2. The Load Item Stage process (PO_ITMLOAD) transfers the data to the item loader staging tables.
3. The Item Loader process (IN_ITMLOAD) transfers the data into the PeopleSoft production tables.
4. The item status is updated on the CUP Item Status page.

The Load Marketplace Items process also adds certain defaults that were not in Marketplace catalog tables to the required fields of the PeopleSoft Item Master tables. This information is hard coded into the Item Catalog PS_ITM_CAT_TBL table:

Field	Value Inserted
CATEGORY_TYPE	<i>PSF</i>
DESCRSHORT	<i>MKTPLACE</i>
INSPECT_CD	<i>N</i>
INSPECT_UOM_TYPE	<i>S</i>
RECV_REQ	<i>Y</i>
RJCT_OVER_TOL_FLAG	<i>N</i>
REVC_PARTIAL_FLG	<i>I</i>
SRC_METHOD	<i>B</i>

This information is hard coded into the Item PS_ITM_LOAD_PUR_EC table:

Field	Value Inserted
TAXABLE_CD	<i>Y</i>
INSPECT_CD	<i>N</i>
INSPECT_UOM_TYPE	<i>V</i>
RECV_REQ	<i>Y</i>
RJCT_OVER_TOL_FLAG	<i>N</i>
ACCEPT_ALL_VENDOR	<i>N</i>
ACCEPT_ALL_SHIPTO	<i>Y</i>
CONTRACT_REQ	<i>N</i>
RECV_PARTIAL_FLG	<i>I</i>
DESCRSHORT	<i>MKTPLACE</i>
SRC_METHOD	<i>B</i>
ACCEPT_ALL_UOM	<i>Y</i>
PRICE_DT_TYPE	<i>L</i>
PRICE_CAN_CHANGE	<i>P</i>
VNDR_CATALOG_ID	<i>Y</i>

Related Links

[Setting Up Installation Options](#)

[Setting Up Attachments for Transactions](#)

[Validate and Process Imported Items Page](#)

Item Defaults Page

Use the Item Defaults page (PV_CP_RUN_DEFAULTS) to define item import defaults.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Import Item Catalog File

Select the Item Defaults tab.

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

<i>Field or Control</i>	<i>Description</i>
Image Folder	Enter the file location that contains images for use with the catalog items that you import.
Inventory Item	Select to indicate this item is also a PeopleSoft Inventory item. This means you can source the item from Inventory.
Account	Select an account to which you want the categories to belong.
Currency	Select the currency to use with this category.

Validate and Process Imported Items Page

Use the Validate and Process Imported Items page (PV_CP_PROCESS) to validate and process imported items loaded by the Import CUP File process page into the staging tables PV_CP_LOAD and PV_CP_CAT_TMP.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Validate and Process Imported Items

Also use this page to review categories and items, to determine the state the items are in, and to load the staged items into the Inventory tables.

This example illustrates the fields and controls on the Validate and Process Imported Items page. You can find definitions for the fields and controls later on this page.

Validate and Process Imported Items

SetID SHARECORPORATE SETID

Process Instance14544

Details

Personalize | Find | View All |  

First 1 of 1 Last

	MarketPlace Supplier	Supplier	Count	Categories	View Items
1	Graybar	XYZ Delivery Service	1	Categories	View Items

Load Staged Items

Delete All

[Return to Administer Procurement](#)

 [Return to Search](#)

Field or Control	Description
Categories	This link takes you to the Edit Imported Items Categories page.
View Items	This link takes you to the Imported Item Status page.
Load Staged Items	When you have determined that the results are satisfactory, you can load the staged items from the eProcurement staging tables into the Inventory tables.
Delete All	Deletes all pending data from the eProcurement staging table.

Related Links

[Validate and Process Imported Items Page](#)

Edit Imported Item Categories Page

Use the Edit Imported Item Categories page (PV_CP_CATEGORIES) to edit imported item categories for the items loaded from a Marketplace.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Validate and Process Imported Items

Click the **Categories** link.

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

Edit Imported Item Categories

Account

Copy

Details		Personalize Find View All  	First 1-4 of 4 Last
	Category	Description	Account
1	11111111		100000 
2	12352201		100000 
3	44444444		100000 
4	66666666		100000 

Return

[Return to Administer Procurement](#)

Note: These categories are created from the UN/SPSC codes downloaded from a Marketplace. Add an account to each new category. The account is the top level of the ChartFields (chart of accounts) used to create accounting entries in PeopleSoft. If the CUP file does not create any new item categories, this page does not appear.

Field or Control	Description
Account	Enter the default account for this category. The account is the top level of the PeopleSoft ChartField used to create accounting entries in PeopleSoft. This field is required.
Copy	Click to copy the value in the Account field to every row on this page.

Related Links

“Understanding Procurement Options” (PeopleSoft Source to Settle Common Information)

Imported Item Status Page

Use this page to update information for items that are in staging tables. After making the updates, you can load them into PeopleSoft production tables. You can load an item again if its status is *Processing Complete*.

Use the Imported Item Status page (PV_CP_STATUS) to maintain CUP item statuses in the PV_CP_LOAD and PV_CP_CAT_TMP staging tables, correct errors, add more details, and change the item status.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Validate and Process Imported Items

Click the **View Items** link.

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

Imported Item Status

Process Instance 14231
Partner Name Water Widgets

Item Status Processing Complete

Chunk Size 100
⏮ ⏪ ⏩ ⏭
Total 4

Imported Item Status

Personalize | Find | View All | 📄 📊

First ⏮ 1-4 of 4 ⏭ Last

Sequence	Part Number	Extension	UOM	Action
1	CM_39_000000000001	CAT001	EA	A
2	CM_39_000000000002	DOG001	EA	A
3	CM_39_000000000003	FISH001	EA	A
4	CM_39_000000000004	HAM001	EA	A

Return

Field or Control	Description
Item Status	The current load status of the items in the staging tables. The drop-down list only displays a status if items currently exist at that status. Values include: <i>Invalid Unit of Measure:</i> Select to display all items with units of measure that are invalid in PeopleSoft eProcurement. <i>Invalid or Missing Category:</i> Select to display all items that do not have a valid item category. <i>Invalid or Missing Supplier:</i> Select to display all items that do not include a valid supplier and supplier. <i>Item to be Updated:</i> Select to display all items that have been previously loaded into PeopleSoft eProcurement and currently need to be updated with new item information. <i>Price to be Updated:</i> Select to display all items that have been previously loaded into PeopleSoft eProcurement and currently need to be updated with new pricing information. <i>Ready to Build Items:</i> Select to display all items that are ready to be loaded into the PeopleSoft Item Master tables. <i>Items to be Inactivated:</i> Select to delete items from the catalog. <i>Processing Complete:</i> Appears when the item has been entered successfully into the PeopleSoft production tables.

The actions on this page will display either *A* for add or *D* for delete.

Load Item Catalogs Page

Use the Load Item Catalogs page (PV_CP_ITM_LOAD) to load Marketplace items into PeopleSoft item tables.

The data is loaded from the PV_CP_LOAD and PV_CP_CAT_TMP staging tables to the production tables for PeopleSoft items.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Validate and Process Imported Items

Click the **Load Staged Item** button.

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

Load Item Catalogs

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

Execution Parameters

Process Instance
Run Control ID QUICK_2013-02-07-16.22.50.

*Item SetID

Execution Options

☒ Run Item Load Process
☒ Run Inbound Items Process
☐ Inventory Item

☐ Update Business Unit Price
☐ Update Standard Price
☐ Index Items

Item Image Sub Folder

[Return to Previous Page](#)
[Return to eProcurement Processes](#)

Field or Control	Description
Run Item Load Process	Select to run the Load Item Stage process (PO_ITMLOAD). If this option is not selected, only the first step in this process is completed. You can run this process separately using the Items Price List page. You can run this process separately to verify or change data in the PO Item staging tables.
Run Inbound Items Process	Select to run the Item Loader process (IN_ITMLOAD). This option is available only if you select the Run Item Load Process check box. You can also run this process separately using the Item Loader page. You can run this process separately to verify or change data in the Item Loader staging tables.
Inventory Item	Select to indicate this item is also a PeopleSoft Inventory item. This means that you can source the item from Inventory.
Update Business Unit Price	Select to update business unit standard prices when an Item and Supplier UOM price record is loaded. This field is available only if <i>Item Pricelist</i> is selected in the Item Load Type field. If this is selected, all business units that match the SetID and item combination and that have the Business Unit Update Price check box selected on the BU Specific Attributes page will have the new price applied. Future effective-dated prices do not go into effect until you run the Price Update process on or after the effective date.

Field or Control	Description
Update Standard Price	Select to update standard prices when an Item and Supplier UOM price record is loaded. This field is available only if <i>Item Pricelist</i> is selected in the Item Load Type field. Future effective-dated prices won't go into effect until you run the Price Update process on or after the effective date.
Item Image Sub Folder	Enter a location where images for use with item catalogs should be stored.

Note: If errors occur during the Item Loader process, use the Data Definition Maintenance page to review them.

Data Definition Maintenance Page

Use the Data Def Maint page (EO_EIP_CTL_MAINT) to correct inventory item load errors.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Correct Item Load Errors

This example illustrates the fields and controls on the Data Def Maint page.

The screenshot shows the 'Data Def Maint' page with the following elements:

- Transaction Type:** ITEM (with a search icon)
- Item Loader & ITEM_SYNC**
- Grid Select:** Staged (dropdown)
- SetID:** (with a search icon)
- Unit:** (text field)
- Reference:** (text field)
- Status:** (dropdown)
- Search** button
- Stage Table Data** section with tabs: Stage Data, Reference, Publish Data, Date Time, Process Instance.
- Table Headers:** Status, EIP Control ID, Transaction Type, Description, User.
- Table Data:**

	Status	EIP Control ID	Transaction Type	Description	User
1	Cancelled	1178136539811395000000002	ITEM	Item Loader & ITEM_SYNC	
2	In Process	1178136539811395000000001	ITEM	Item Loader & ITEM_SYNC	
3	Complete	1164983062227240000000002	ITEM	Item Loader & ITEM_SYNC	
4	Error	1164983062227240000000003	ITEM	Item Loader & ITEM_SYNC	
5	Hold	1164983062227240000000001	ITEM	Item Loader & ITEM_SYNC	
6	New	1241004669331949000000002	ITEM	Item Loader & ITEM_SYNC	

Use this page to review and resolve problems with items.

Related Links

“Data Def Maint Page” (PeopleSoft Supply Chain Management Integration)

Downloading Item Attachments

Any item downloaded could have an item image stored as an attachment. You can download these attachments from a Marketplace. The image of the item appears on the Search Catalog - Item Description page and the Requisition Summary - Item Description page.

To download item attachments from a Marketplace into PeopleSoft eProcurement:

1. Run the Export CUP Data process to create the attachment file from a CUP file.

This file does not contain the actual attachments (item images), just the file names and extensions of each attachment. The actual attachments are downloaded in a separate step. This attachment file cross-references the names and extensions of each attachment to the corresponding item ID.

Note: To create an attachment file from the Export CUP Data process, you must create a product file at the same time from the same CUP file.

2. Run the Import CUP File process to move the data in the attachment file into the eProcurement cross-reference table, PV_CP_ITM_XREF.

Note: Other attachments—other than images—can be downloaded from a Marketplace. Only attachments with a P (picture) type are loaded into the eProcurement cross-reference table, PV_CP_ITM_XREF, when the Import CUP File process runs. All other attachments are loaded into the PV_CP_ATTACH file for future use.

3. Define the location where the item attachments should be stored using:

- a. The File Location page, which defines the first part of the directory and extension of the attachments.
- b. The Load Marketplace Items process, which defines the subdirectory.

For example, if the item attachments that you are downloading are GIF images, the File Locations page defines the file extension (GIF) and the file directory F:\User\Images\. If you enter *MktPlc items* in the **Item Image Sub Directory** field of the Load Marketplace Items page, the attachments with the extension GIF are stored in this directory: F:\User\Images\MktPlc items.

4. Download the zipped file containing the item attachments from a Marketplace.

Place these item attachments in the directory location defined in Step 3.

Related Links

[Setting Up Attachments for Transactions](#)

Using Price and Availability Check

During requisition entry, you can update the price of an item with the most current price in a Marketplace. Click the **Check Price and Availability** button on the Requisition Summary - Item Description page. If the supplier's price in a Marketplace is the same as the price in the item tables, there is no change to the

page. If the supplier's price is different, a message appears which informs you that the price is changing to the supplier's price. The Item Description page then displays the Marketplace price.

Use the Check Price and Availability function to also compare the supplier's available quantity in a Marketplace to the requisition quantity. If the quantity requested exceeds the available quantity, a message appears which provides the opportunity for you to change the requisition quantity.

Note: The **Check Price and Availability** button only appears if this is a Marketplace item that is loaded from a CUP file, and the user has been assigned the eProcurement role action of PRICEANDAVAILCHECK.

See [Understanding Requisitions](#).

Integrating PeopleSoft eProcurement Transactions with a Marketplace

This section provides an overview of transaction integration and discusses how to use the Marketplace Registration Wizard, test the transactional Marketplace integration, move from a test environment to the production environment, prepare to use Marketplace catalog search, and receive a purchase order acknowledgement.

Pages Used to Integrate PeopleSoft eProcurement Transactions with a Marketplace

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Administer Procurement Page	PV_ADM_MAIN	Access other procurement administration pages. This page consists entirely of links to other pages.
Maintaining Supplier Integration Page	PV_ADM_MARKETSITE	Access supplier integration pages. This page consists entirely of links to other pages.
Maintain Suppliers Page	PV_ADM_VNDR	Access supplier-related pages. This page consists entirely of links to other pages.
Maintain Business Units Page	PV_ADM_SETUP_BU	Access business unit-related pages. This page consists entirely of links to other pages.
Marketplace Test Page	SAC_MP_VERIFY	Use this page to verify that PeopleSoft eProcurement and the Marketplace are communicating.
Supplier Information - Summary Page	VNDR_ID1_SUM	This is the first page of the component where you create supplier records.

Page Name	Definition Name	Usage
<u>Linked Suppliers Page</u>	PV_MS_SEC_SUPPLIER	Use the Link Suppliers page to tie Direct Connect and Marketplace supplier information to a supplier.
Supplier Properties Page	PV_MS_SEC_SUP_NV	Use the Supplier Properties page to identify information for the specific supplier location.
<u>Marketplace Registration Wizard Page</u>	SAC_MP_COMPANY	Set up the company's registration with the Marketplace.
<u>Marketplace Buyer Setup Page</u>	PV_MS_SEC_BUYER	Use the Marketplace buyer page to define the URL the system uses when contacting the Marketplace.
<u>eProcurement Business Unit Options Page</u>	PV_BUS_UNIT_PM	Configure the business unit to display the PO acknowledgements button and the advanced shipment notification (ASN) button.
<u>Define Static Maps Page</u>	SAC_MAP_VALUE_ONLY	Enter details that tell the system how to read data coming from the outside source and what value to use in the PeopleSoft format.

Understanding Transaction Integration

This overview discusses:

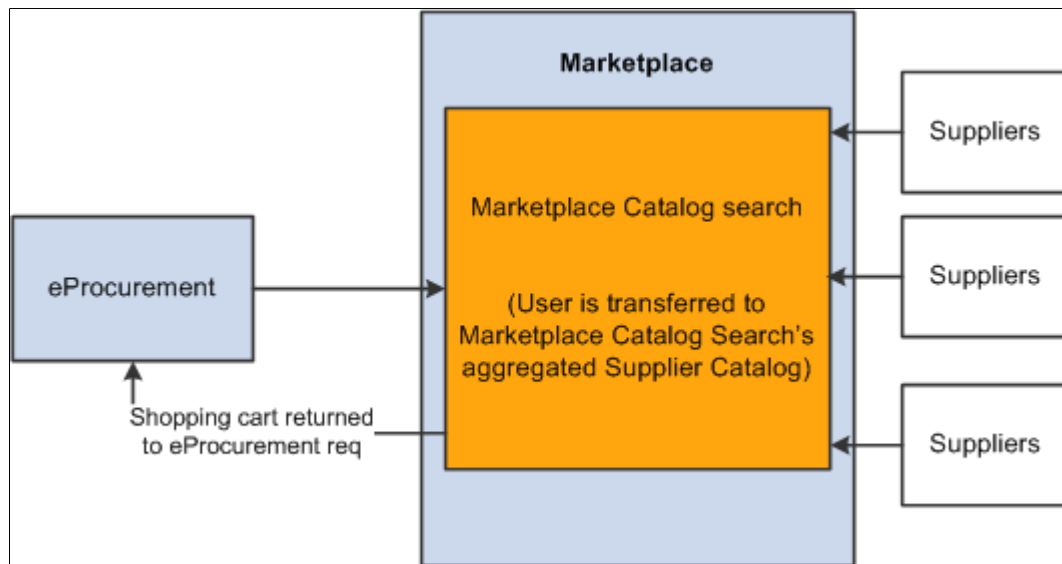
- Marketplace catalog search integration.
- Receipt of Purchase Order Acknowledgements from a Marketplace.
- Receipt of an Advanced Shipment Notification (ASN).
- Receipt of an Invoice.

Marketplace Catalog Search Integration

The Marketplace catalog search is an application that hosts multiple supplier catalogs within the Marketplace.

This diagram illustrates an overview of Marketplace catalog search launched by an PeopleSoft eProcurement user. Users are transferred to the MarketPlace catalog search, where they can search the aggregated supplier catalog and return results to the shopping cart within PeopleSoft eProcurement.

This diagram illustrates an overview of Marketplace catalog search launched by an PeopleSoft eProcurement user.



To set up and use the Marketplace catalog search, you must:

1. Set up security that enables requesters to move from the eProcurement requisition into the Marketplace.
2. Create supplier profiles and supplier locations, and link the properties of that supplier to the information that creates a link to a Marketplace.

Note: Upon completion of this setup, a link will be provided in the eProcurement requisition. Selecting this link directs the requester to the Marketplace site.

3. Set up background details that determine which supplier catalogs the requester can view.

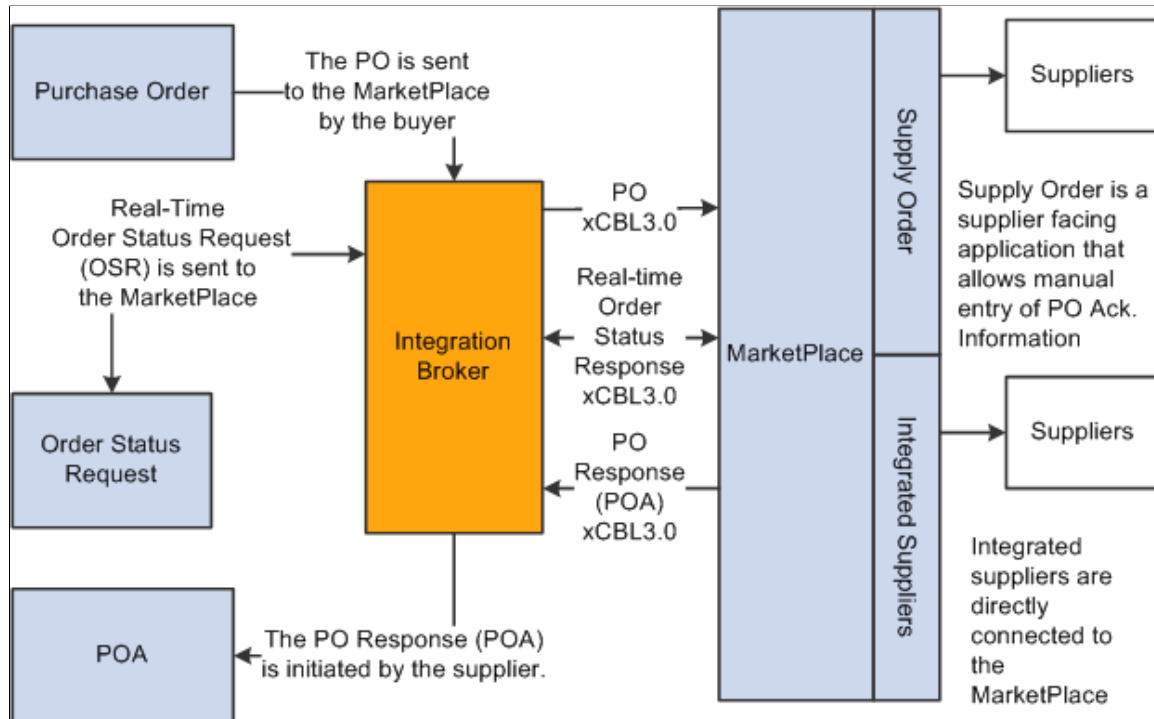
The Marketplace validates requester security and displays the catalogs that the requester can view. The requester selects catalog items and returns to the requisition. The system populates the selected items as requisition lines.

Receipt of Purchase Order Acknowledgements from a Marketplace

The purchase order acknowledgement (POA) is a collaboration among the supplier, the Marketplace, and the PeopleSoft application. To create and transmit a POA, these steps must occur:

1. Once the purchase order has been dispatched from PeopleSoft, the supplier logs into the Marketplace and finds that the purchase order is available in a queue for that specific supplier. Suppliers can initiate a POA document from the Marketplace.
2. The Marketplace then transmits xCBL formatted POA to PeopleSoft, where it is transformed to the PeopleSoft internal format PSXML.
3. The inbound message populates the PO Electronic Commerce tables.
4. If the POA results in changes; a change order may be generated.

This diagram represents the flow of the POA from the Marketplace.



Note: The POA is mapped to a line, not to a schedule within the Marketplace. Only one schedule is allowed within Marketplace POA integration.

Note: The Notes to Buyer from the Marketplace are not mapped to the PeopleSoft system.

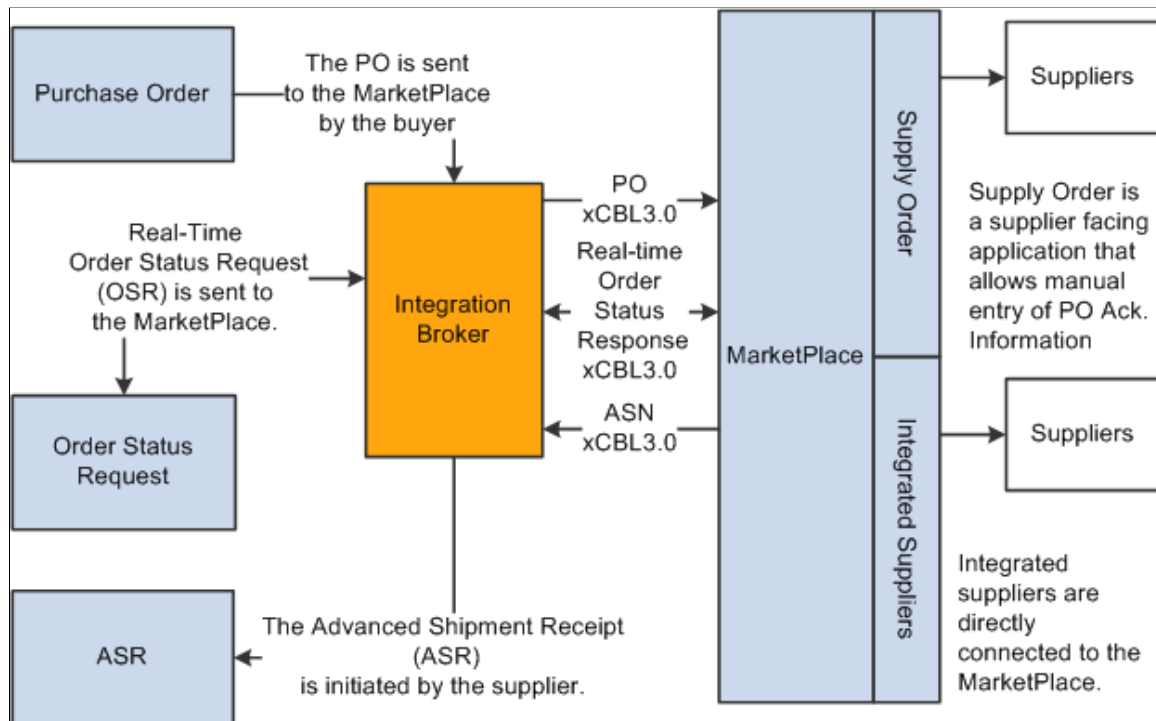
Two options are available for receiving a purchase order acknowledgement from a supplier. The first is a *POA*, which uses the PeopleSoft Purchasing functionality and stores the status within Purchasing tables. The second is the *POR* (purchase order response), which is where you can view the status from the PO Dispatch Message page. **eProcurement > Buyer Center > Dispatch Purchase Order > Dispatch Message Log.**

Receipt of an Advanced Shipment Notification (ASN)

The supplier uses the advanced shipping receipt (ASR) enterprise integration point (EIP) to notify the PeopleSoft system that the order has been fulfilled. To complete the integration, these steps must occur:

1. A supplier is able to enter advanced shipping notifications (ASNs) within the Marketplace site.
2. Once submitted, Integration Broker transforms this data to the PeopleSoft inbound ASR message using the Advanced Shipping Receipt (ADVANCED_SHIPPING_RECEIPT) service operation in PeopleSoft.
3. The message populates the Receipt Load tables.
4. The Receipt Loader process is then run to create a receipt, which may then be approved by an administrator.

This diagram represents the flow of the supplier-entered ASN from the Marketplace.



Receipt of an Invoice

When an integrated supplier creates an invoice and sends it to the Marketplace, or when an invoice is created, the Marketplace sends the invoice to the Integration Broker. The Integration Broker then transforms the invoice from xCBL 3.0 to the PeopleSoft inbound XML invoice message.

From the Integration Broker, the Marketplace partner ID (MPID) that is passed from the Marketplace is used to look up the supplier ID field using the Linked Supplier table. The supplier SetID and supplier ID are retrieved based on this information.

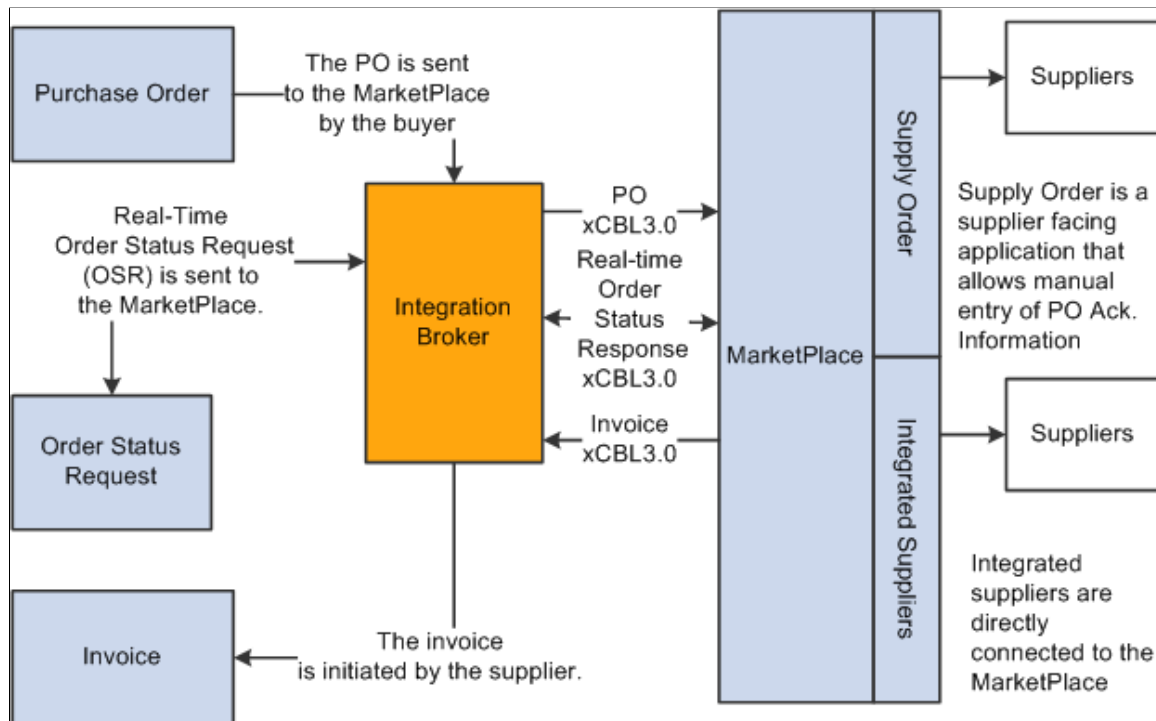
Once the supplier ID is established, the invoice is loaded to the voucher staging tables.

When the data is in the staging tables, these steps take place:

1. Voucher build is run.
2. Voucher is created.
3. Matching may be run if the voucher has an associated purchase order or receipt.
4. Paycycle process creates a payment.

This diagram represents the flow of an invoice from the Marketplace as defined in the above steps.

This diagram represents the flow of an invoice from the Marketplace.



Note: The Marketplace invoice integration is not supported if PeopleSoft eSettlements is active.

PeopleTools: Integration Broker

Marketplace Registration Wizard Page

Use the Marketplace Registration Wizard page (SAC_MP_COMPANY) to set up the company's registration with the Marketplace.

Navigation:

Click the **Marketplace Registration** link on the Maintain Supplier Integration page.

The wizard will guide you to enter this information before submitting the registration:

- Company information.
- Company contacts.
- Gateway information.

This example illustrates the fields and controls on the Company Information – Marketplace Registration Wizard.

Company Information
Marketplace Registration Wizard

1 — 2 — 3 — 4 <<Previous Next>>

SetID SHARE CORPORATE SETID

*Company ☒ Visible in the Marketplace

Description

Administrator User Details

*User ID

*Password

Company Address

*Telephone

Time Zone

Country USA United States

Address 1

Address 2

Address 3

City

County Postal

State

* Address Fields are Required except Address 2, Address 3 and County

[Return to Administer Procurement](#)

Enter the company information, including the **User ID** and **Password** to use when logging into the Marketplace.

Enter the Gateway production and test URL.

See [Marketplace Test Page](#), [Moving From a Test Environment to the Production Environment](#).

Marketplace Test Page

Use the Marketplace Test page (SAC_MP_VERIFY) to use this page to verify that PeopleSoft eProcurement and the Marketplace are communicating.

Navigation:

Click the **Marketplace Test** link on the Maintain Supplier Integration page.

Before using the production environment, you should elect to submit a test. This test verifies that PeopleSoft eProcurement is communicating with the Marketplace test environment by sending a predefined purchase order with a predefined test supplier. The purchase order will be a generic, nonconfigurable, purchase order. It will only be used to test the connectivity; it will not be fulfilled.

Moving From a Test Environment to the Production Environment

Once you have successfully tested the PeopleSoft test environment, the administrator performs these tasks to move the buyer setup data into the production database:

1. Log in to Data Mover for the source and test database.
2. Use Marketplace script *upd304852_01.dmsto* export relevant Marketplace definitions:
 - Marketplace buyer.
 - Marketplace registration information.
3. Log in to Data Mover for the target and production database.
4. Use Marketplace script *upd304852_02.dmsto* import relevant Marketplace definitions:
 - Marketplace buyer.
 - Marketplace registration information.
5. When you are ready for production, navigate to the Marketplace buyer page and change the URL to the Marketplace production URL.

See [Marketplace Buyer Setup Page](#).

Preparing to Use Marketplace Catalog Search

Before you begin using Marketplace catalog search, you must create a link to the Marketplace. This link will appear on the requisition for users to access the supplier catalogs:

1. Create a generic supplier profile for the Marketplace that is then tied to a link supplier configuration. This combination is used to link to the Marketplace website to the requisition.
2. Set up logins for each location, and register each within the Marketplace.
3. Create a supplier profile for each supplier the company does business with.
4. Associate each supplier location with its individual linked supplier; this includes all supplier locations for the Marketplace supplier profile.
5. Create a node for each login ID that is passed from eProcurement to the Marketplace.

Setting up Supplier Profiles

Access the Supplier Information - Summary page.

Navigation:

eProcurement > Administer Procurement > Maintain Suppliers > Supplier Information

To enable the Marketplace integration, you must complete these tasks:

1. Create a supplier profile for the Marketplace.

2. Create supplier locations for every login ID you have with the Marketplace.
3. Create supplier profiles for each supplier you do business with within the Marketplace.
4. Create link supplier identifiers for each supplier location.

See “Understanding Supplier Maintenance” (PeopleSoft Source to Settle Common Information).

Using Rule-Based Catalogs with the Marketplace

Rule-based catalogs are a form of security within PeopleSoft eProcurement. As an administrator, you have the option of allowing requesters visibility of catalogs, as well as the links to the direct connect suppliers, based on the criteria you define within the catalog security. The Marketplace is considered a direct connect supplier in this case. You can determine requester access based on role, business unit, or a specific requester ID. Think of each Marketplace catalog search link as a different catalog. Use rule-based catalogs to help in determining which catalogs requesters are capable of viewing upon login to the Marketplace.

See [Understanding Catalog Security](#).

Define Static Maps Page

Use the Define Static Maps page (SAC_MAP_VALUE_ONLY) to enter details that tell the system how to read data coming from the outside source and what value to use in the PeopleSoft format.

Navigation:

Click the **Integration Data Value Mappings** link on the Maintain Supplier Integration page.

This example illustrates the fields and controls on the Define Static Maps page.

Define Static Maps

Map ID XCBL30_PO_RESPONSE_TYPE
☒ Active

*Description xCBL3.0 ResponseTypeCode map

Static Transformation (* = All unmatched values)
Personalize | Find | View All |
First 1-12 of 67 Last

	External Value	Internal Value		
1	Accepted	Accepted	+	-
2	AcceptedContentsRejected	Accepted	+	-
3	AcceptedWithAmendment	Accepted	+	-
4	AcceptedWithAmendmentInDetailSection	Accepted	+	-
5	AcceptedWithAmendmentInHeadingSection	Accepted	+	-
6	AcceptedWithAmendmentNoConfirmationsRequired	Accepted	+	-
7	AcceptedWithReserves	Accepted	+	-
8	AcceptedWithoutAmendment	Accepted	+	-
9	AcceptedWithoutReserves	Accepted	+	-
10	AcknowledgeNoDetailOrChange	Received	+	-
11	AcknowledgeWithDetailAndChange	Received	+	-
12	AcknowledgeWithDetailNoChange	Received	+	-

PeopleSoft is delivered with POA statuses mapped from the Marketplace header and line formats. If you add a new status in the Marketplace, you can add the mapping to the PeopleSoft status codes.

These are the POA header status mappings:

Marketplace Value	xCBL 3.0 Value	PeopleSoft Value (ACK_Status)
Accepted	Accepted	AT (Accepted)
Accepted with Changes	AcceptedWithAmendment	IC (Accepted with Changes)
Cancelled	NotAccepted	RD (Rejected)
Completed	AcceptedWithAmendment	IC (Accepted with Changes)
Not Accepted	NotAccepted	RD (Rejected)
Other	AcceptedWithAmendment	IC (Accepted with Changes)
Payment Required	AcceptedWithAmendment	IC (Accepted with Changes)
Processing	AcceptedWithAmendment	IC (Accepted with Changes)
All Other Statuses	All Other Statuses	ZZ (mutually defined)

The POA line status mapping options are:

Marketplace Value	xCBL 3.0 Value	PeopleSoft Value (ACK_Status)
Accepted	ItemAccepted	AT (Accepted)
Accepted with Changes	AcceptedWithAmendment	IC (Accepted with Changes)
Cancelled	NotAccepted	RD (Rejected)
Completed	AllreadyDelivered	IC (Accepted with Changes)
Not Accepted	ItemNotAcceptedByTheSeller	RD (Rejected)
Other	AcknowledgeWithDetailAndChange	IC (Accepted with Changes)
PrePayment Required	Other	ZZ (mutually defined)

<i>Marketplace Value</i>	<i>xCBL 3.0 Value</i>	<i>PeopleSoft Value (ACK_Status)</i>
Processing	Pending	ZZ (mutually defined)
All Other Statuses	All Other Statuses	ZZ (mutually defined)

Related Links

[Supplier Value Cross-Reference Page](#)

Integrating with Direct Connect Suppliers

Understanding Direct Connect Supplier Integration

The Direct Connect feature enables you to integrate with the items in a third-party supplier's website using:

- *Punchout*: The punchout feature enables PeopleSoft eProcurement requisition users to interact directly with a supplier's website (using cXML). Using PeopleSoft Integration Broker, the user is sent from the PeopleSoft eProcurement requisition to the supplier's website. This interaction enables the user to browse and search the supplier's online catalog to select items to add back into the eProcurement requisition. When finished at the supplier website, the user is transported back to the eProcurement requisition. The punchout feature is best suited for products requiring a high degree of configuration (such as computer hardware or office furniture) and specialized services (such as printing or media services).
- *Roundtrip*: The roundtrip feature enables PeopleSoft eProcurement requisition users to interact directly with a supplier's website or a marketplace using the OCI (Open Catalog Interface) standard. Using PeopleSoft Integration Broker, the user is sent from the PeopleSoft eProcurement requisition to the supplier's website. This interaction enables the user to browse and search the supplier's online catalog to select items to add back into the eProcurement requisition. When finished at the supplier website, the user is transported back to the eProcurement requisition. The Roundtrip feature is similar to the Punchout feature. The key differences between Roundtrip and Punchout are the authentication method, format of the shopping cart data, and the format of the purchase order. After you complete a transaction using Roundtrip, you can return to view the shopping cart contents, but you cannot return to the supplier's shopping cart and make changes to the order.
- *Transparent Punchout*: The transparent punchout feature enables PeopleSoft eProcurement requisition users to retrieve items (using XML) from a supplier's website without being transferred to the website. With transparent punchout, the requester does not visibly access the supplier site. Transparent punchout accesses the site in the background (using the PeopleSoft Integration Broker) and returns the search results directly to PeopleSoft eProcurement. Requesters do not leave the eProcurement requisition and do not need to perform additional navigation to return to PeopleSoft eProcurement. The transparent punchout feature is best suited for products with fluctuating prices, or extremely large or specialized catalogs, such as chemical supplies, that you want the supplier to manage.
- *Punchout via OBN*: The Punchout via OBN feature enables eProcurement requesters to access and add items to the cart directly from a supplier's external catalogs in real-time. Multiple punchout catalogs can be associated with one Supplier location using OBN. Requesters are seamlessly redirected from eProcurement to the supplier's site where they can browse and select the product. Once selection is complete, the items are automatically transferred back into the requisition.

The product or service items that you add to an eProcurement requisition is processed through the approval workflow. The requisition is eventually converted to a purchase order, which can be routed to the supplier's website. This integration enables you to access multiple supplier catalogs in real-time, without loading or maintaining catalogs within PeopleSoft applications, including eProcurement.

PeopleSoft eProcurement supports:

- Punchout integration that uses cXML.
- Roundtrip integration that uses OCI (Open Catalog Interface) to format the data returned from the shopping session.
- Roundtrip to marketplace.
- Transparent Punchout integration that uses XML.

Note: The Direct Connect Supplier feature requires some set up by the organization. The steps for entering an order with a direct connect supplier vary according to the supplier and the set up. Because direct connect order processing involves integration with another website, the eProcurement change request feature might not be available for purchase orders that are created in this manner.

Using Requisition Line Chunking with Direct Connect

If chunking is enabled and you add a Direct Connect item from a supplier website to an existing eProcurement requisition while in edit mode, the system displays a warning message to save the requisition prior to punching out to the supplier website. After selecting and checking out items from a supplier website and then returning to the eProcurement application, the new items are added to the chunk set that is being displayed if the total number of lines exceeds the chunking limit. If the total number of lines does not exceed the chunking limit, the new items are then added to the end of the requisition.

Initiating Punchout or Roundtrip

Once you have completed the setup of a Punchout or Roundtrip supplier, you will be able to access the supplier's website from within the eProcurement requisition using the Create Requisition — Web page (**eProcurement > Create Requisition > Web**).

This example illustrates the fields and controls on the Create Requisition - Web page.

Merchant	Description
Computer Depot	Computer hardware and accessories online warehouse.
XYZ Tools shop	General tools and supplies.
ABC Office	Office Supplies online store for businesses.

Click the Merchant name to be transferred to the supplier's website where you can browse and select items.

Using Transparent Punchout

Once you have completed the setup of a Transparent Punchout supplier, you will be able to retrieve item data from the supplier's website and display it within your eProcurement requisition.

The following is an example of an item search that includes Transparent Punchout:

Access the Catalog page (**eProcurement** > **Create Requisition** > **Catalog**)

This example illustrates the fields and controls on the Create Requisition - Catalog page.

The screenshot shows the 'Create Requisition' page with the 'Catalog' section selected. The top navigation bar includes 'Welcome Kenneth Schumacher', 'Home', 'My Preferences', 'Requisition Settings', '0 Lines', and a 'Checkout' button. Below the navigation bar, there is a search bar with 'Catalog' entered and a 'Search' button. The left sidebar lists various request options, including 'All Request Options', 'Catalog', 'Web', 'Express Item Entry', 'Special Requests', and 'Services Procurement'. The main content area displays a grid of categories: 'All Purchase Items', 'Computer Equipment', 'Hardware Catalog', 'Accessories', 'Camping Equipment', 'Climbing Equipment', 'Cycling Equipment', 'Facilities', 'FEES', 'Fishing Equipment', 'Fleet', 'Hardware', 'More...', 'Outdoor Supplies', and 'Cooking Supplies'.

When creating a new requisition or editing an existing requisition, the Search field at the top can be used to search for items from multiple sources. The user enters a keyword or words in the Search field and clicks the Search button.

A search for the keyword is initiated in all available catalogs for which the requestor has access; including both internal items (loaded catalogs, favorites, and templates) and external items (direct connect catalogs and TPO catalogs using Transparent Punchout).

Depending on the search capabilities supported by the third-party websites using Transparent Punchout, you can enter more than one keyword on the search field. When multiple keywords are used for searching the search results are expanded to include items matching any one of the keywords (the Boolean operator is OR not AND).

Access the Search Results page (**eProcurement** > **Create Requisition**. Enter search criteria in the Search field and click on the Search button.)

This example illustrates the fields and controls on the Create Requisition - Search Results page.

Create Requisition ?

Welcome Kenneth Schumacher

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search All desktop Search Advanced Search

Filter by

Item Category
 Keyboards (70)
 Office Equipment, Access..(19)
 Uncategorized (4)
 Calculators (2)
 Desk organizers and acces..(1)
 More...

Manufacturer Name
 CDW (71)
 Staples Next 2 (9)
 Staples Inc. (5)
 Staples Next 3 (5)
 No Value (4)
 More...

Supplier Name
 CDW (71)
 Staples Inc. (19)
 Bay Area Electric (4)
 SHI (3)

Preferred Supplier

Search "desktop"
 Catalog - Only the first 50 results are displayed. Please refine the search parameters.

☐ Select All/Deselect All Add Selected To: Cart Compare Favorites Templates

*Sort By Relevance Ranking

Catalog Search Results ? Find First 1-50 of 50 Last

☐ No Image

Fellowes 93821 Premium Desktop

Contract

Item ID 000000000000100054
 Supplier Item ID 86860203
 Mfg Item ID
 Price 110.6500 USD
 UOM Each
 Lead Time 1

Quantity Add Add to Favorites Add to Template(s)

IOGEAR Compact Desktop Combo GKM502 - Desktop - Keyboard & Mouse

Item ID
 Supplier Item ID 1372923
 Mfg Item ID

Supplier Bay Area Electric
 Supplier ID USA0000001
 Manufacturer
 Manufacturer ID
 Lead Time 1

Supplier CDW
 Supplier ID USA0000010
 Manufacturer CDW

From the search results displayed the requester can select one or more items. The search results are grouped into different tabs based on their source; favorites, templates, and services procurement. The catalogs section contains the search results from Transparent Punchout. Internal and external items matching the search results are displayed in a single tab i.e. the Catalog tab. This happens only under certain conditions:

- The Consolidate Item Search Results and Facets Option check box is selected on the eProcurement Installation Options page.
- The marketplace allows facet syncing.
- The internal catalogs information and internal supplier information has been exported to the marketplace.

In the search results for external items there will not be an item ID displayed. The icons for Inventory Availability, Price Breaks, Price Adjustments and Item Substitution will not be shown. The icon for Contract will be displayed when applicable.

You have to setup cross reference to map the internal supplier ID to the appropriate marketplace supplier ID to display correct marketplace supplier ID in the search result.

Understanding Punchout

Direct connect enables PeopleSoft eProcurement requisition users to interact directly with a supplier's website. This interaction enables the user to browse and search the supplier's online catalog to select items to add back into the eProcurement requisition using an approved standard process such as Punchout.

You set up direct connect methods and supplier details, such as URLs (uniformed resource locator). You then run through a series of background processes. eProcurement:

- Passes and receives strings of data which are transformed from XML into PeopleSoft service operations.
- Makes it possible for users to access and browse supplier catalogs.
- Adds requisition lines using supplier shopping carts.
- Sources purchase orders (POs) to suppliers.

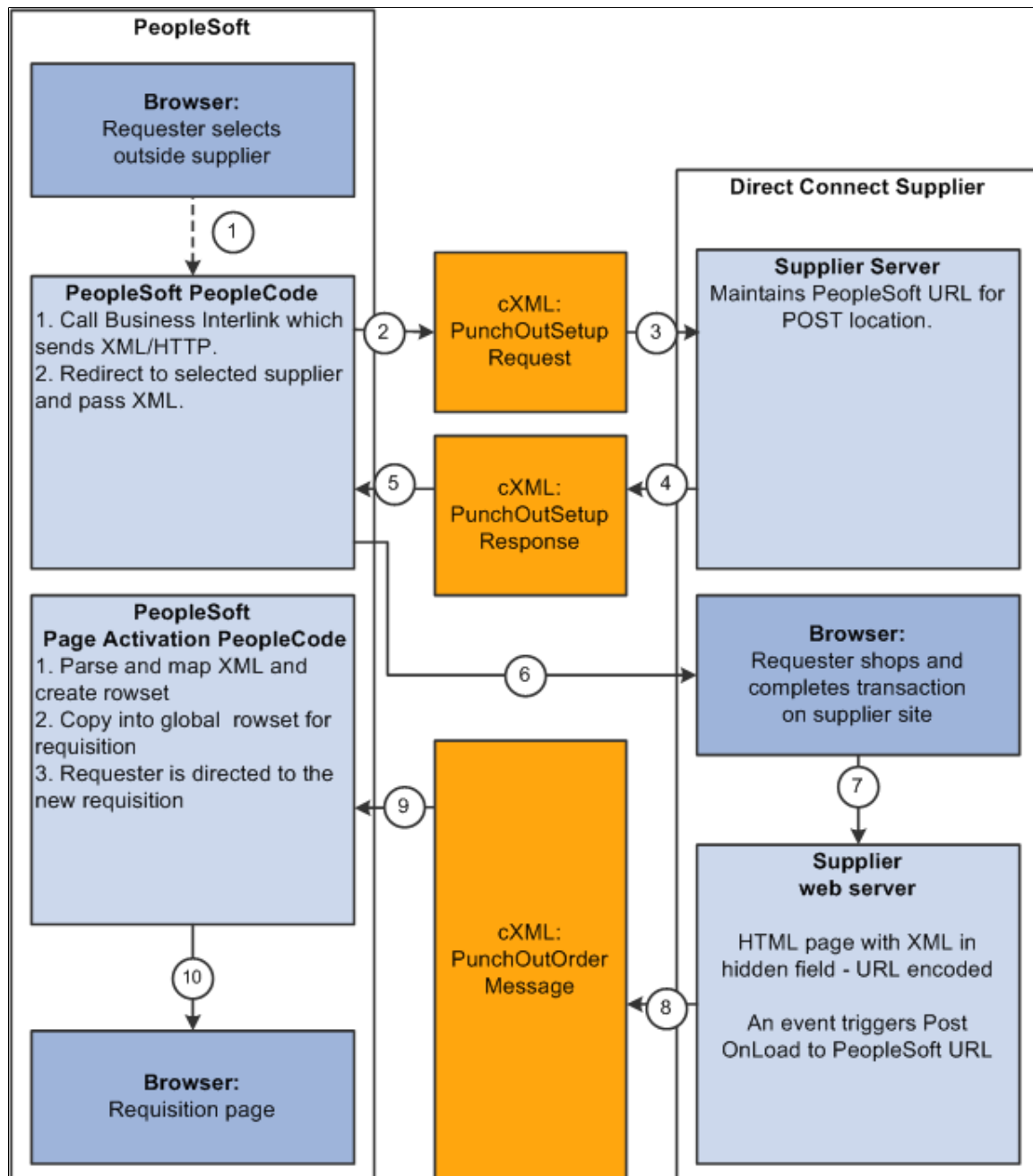
Direct connect supplier integration enables you to create configured orders for products or services such as:

- Computer systems with various types of processors, memory requirements, and peripherals.
- Printing jobs with varying text, colors, types and sizes of paper, numbers of copies, and output formats.
- Catered events with different locations, times, types of food, and levels of service.

Process Flow for Direct Connect Supplier Integration Using Punchout

This illustration describes the process flow of the integration between PeopleSoft eProcurement and a direct connect supplier who uses Punchout. Detailed steps below this illustration described the process flow:

This image illustrates the process flow of the integration between PeopleSoft eProcurement and a direct connect supplier who uses Punchout.



Warning! PeopleSoft and the direct connect suppliers might have site time-outs that could cause you to lose unsaved state information.

This list illustrates the steps in the previous diagram for using Punchout to create an eProcurement requisition:

1. The system saves all levels of the current requisition to a global rowset. This preserves the state of the requisition so that changes made since the creation or the last save of the requisition are not lost. Then, based on the supplier, the system selects the proper connection method, and the code transfers to the component that handles the method.

2. Based on the direct connect method registered to the selected supplier, the system loads the appropriate application class and runs the code to connect to the supplier. This code uses requisition data and properties for the supplier to populate a PeopleSoft service operation. The Integration Broker then transforms the service operation into the XML PunchoutSetupRequest, which contains authentication information to facilitate a single sign-on into the supplier's system.

If a supplier implements the sign-on differently than the standards for the selected method, you should code the supplier's sign-on logic in a separate direct connect method application class or Integration Broker transformation. This XML also contains a PeopleSoft eProcurement component URL to which the supplier posts the results of the shopping cart in step 8.

3. After building the XML, the system sends it to the supplier's URL as defined in the supplier's node definition. The supplier receives this request document and authenticates the user.
4. The system returns a response to eProcurement, if the user is successfully authenticated, that contains the supplier's URL for redirection.
5. eProcurement receives this XML-based response through Integration Broker. Integration Broker runs a transformation from the PunchoutSetupResponse to the service operation behind the scenes.

Note: The system synchronously returns the response from the original authentication request. It is not a separate process. The supplier's URL is extracted from the service operation.

6. PeopleSoft eProcurement redirects the user to the URL sent in the response from the supplier.
7. The user browses the supplier's site and places an order. Based on sign-on information, the supplier can maintain customer specific pricing. Typically, this is done at a business level, not at a user level.
8. After the order is complete and the user checks out, the supplier's site packages the shopping cart into an XML string and places it in an HTML hidden form field. The user is redirected to the eProcurement component URL specified at sign-on in step 2.
9. The eProcurement component that has been redirected to extract the XML string from the hidden form field. The string is parsed into a PeopleSoft service operation using another Integration Broker transformation. Just as in the authentication process in step 2, the application class or transformation might need to be customized if the supplier does not follow the standard document structure or has unique extrinsic fields. The user is transferred to the originating requisition.
10. When the requisition component is reinitialized, the global rowset from step 1 containing the original requisition information is reloaded. The items from the external item service operation, containing the shopping cart data, are added as new rows to the requisition. These lines inherit the requisition's line default values just as any other item being added. The system displays the requisition Summary page to the user.

Note: Items that are selected on a supplier's website are not transmitted to eProcurement unless the connection is initiated through the supplier's link in eProcurement.

Using Extrinsic Values

The cXML extrinsic elements that are part of the PunchoutSetupRequest and the PunchoutOrderMessage can be used to send and receive data that does not fit in the other elements in the message.

For example, in the PunchoutSetupRequest, the extrinsic element can be used to send data that further identifies users, such as:

- User department / cost center
- Region
- Supervisor
- Default currency

The data is sent, essentially, as a name/value pair, as shown in this sample PunchoutSetup request below.

```
<Request>

  <PunchoutSetupRequest operation="edit">

    <BuyerCookie>1CX3L4843PPZO</BuyerCookie>

    <Extrinsic name="UserEmail">jsmith</Extrinsic>

    <Extrinsic name="UniqueName">John_Smith</Extrinsic>

    <Extrinsic name="CostCenter">610</Extrinsic>

    <BrowserFormPost>

      <URL>https://psftserver/psc/ps/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_DC_CATCHER.GBL?Page⇒
=PV_DC_CATCHER&MSGNODENAME=WORKCHAIRS</URL>

    </BrowserFormPost>

    <SupplierSetup>

      <URL>http://www.workchairs.com/punchout.asp</URL>

    </SupplierSetup>

    <ItemOut quantity="2">

      <ItemID>

        <SupplierPartID>220-6338</SupplierPartID>

        <SupplierPartAuxiliaryID>E000028901</SupplierPartAuxiliaryID>

      </ItemID>

    </ItemOut>

  </PunchoutSetupRequest>

</Request>
```

The PunchoutOrderMessage includes the following cXML extrinsic elements:

- Message/PunchoutOrderMessage/Extrinsic/@name
- Message/PunchoutOrderMessage/Extrinsic

The use of extrinsic elements can be unique to each supplier; therefore, a separate object can be associated with each direct connect supplier to handle logic specific to the supplier. To use extrinsic elements for a direct connect supplier, complete the following setup steps:

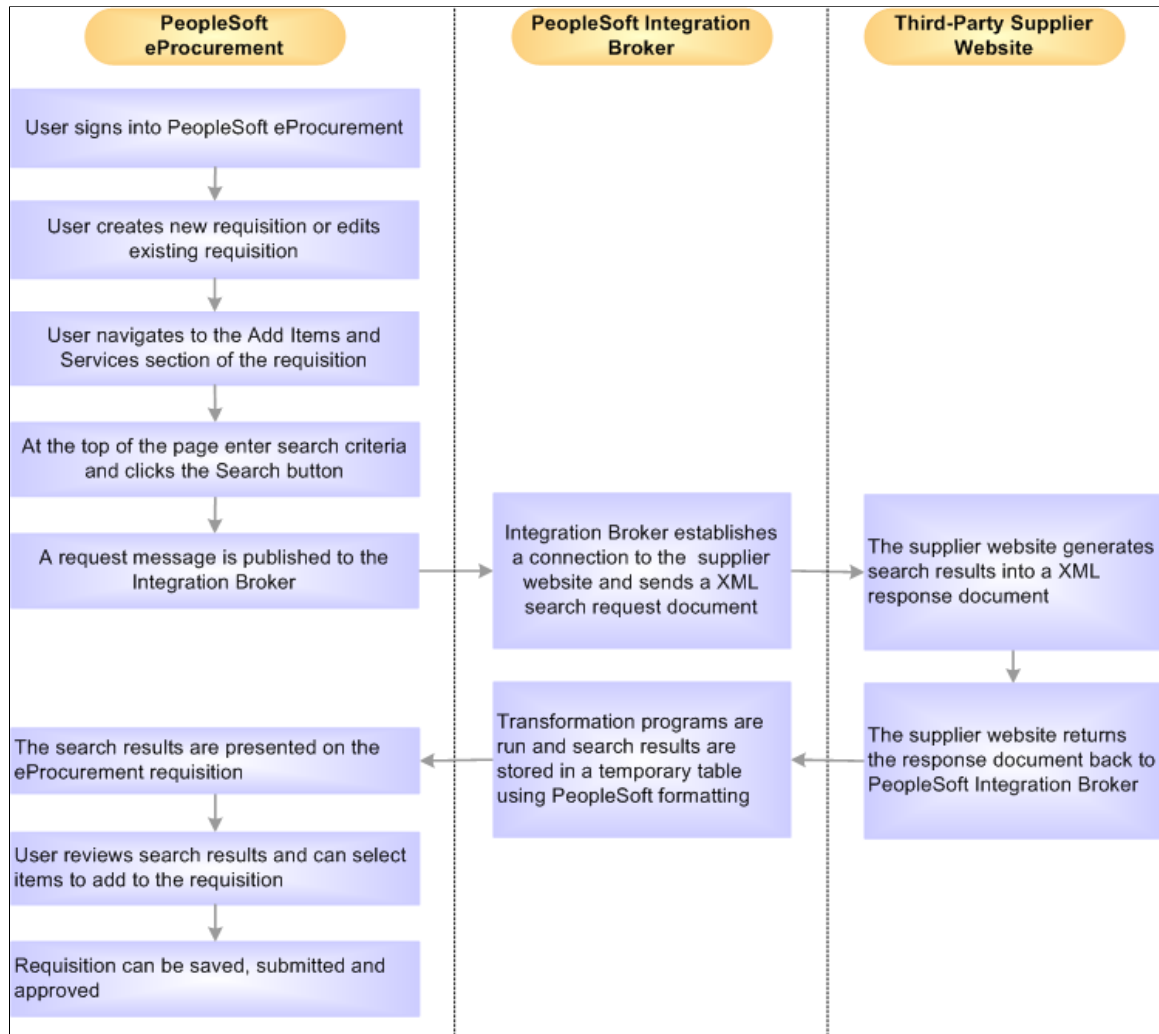
1. Create a new application package and class to extend the class to the SetReqstExtrinsic() method. Be sure to add code into the SetReqstExtrinsic() method that adds values to the extrinsic rowset in the rowset object that is passed into the method.

2. Register the application class as a new direct connect method within the PeopleSoft eProcurement application. Go to eProcurement Administration, Maintain Supplier Integration, Direct Connect Methods and:
 - a. Add the new direct connect method.
 - b. Associate the new method with the application package that was just created by entering the Root Package ID and Application Class Path that were created in step 1. The Description field is helpful to identify the uniqueness of this particular Direct Connect type, such as support for a new cXML version or addition of a supplier's Extrinsic values.
 - c. Assign the list valid properties for the 'PUNCHOUT' method to this new method. Since this is simply an extension of 'PUNCHOUT', all the properties should match.
 3. Associate the new direct connect method to the supplier. Go to eProcurement Administration, Maintain Supplier Integration, Linked Suppliers and select the supplier. Add the new method in the Direct Connect Method field.
-

Understanding Transparent Punchout

With the Transparent Punchout feature, the requester does not visibly access the supplier site. Transparent punchout accesses the site in the background using the PeopleSoft Integration Broker and returns the items directly to PeopleSoft eProcurement, with no changes to the requester's user interface. Requesters perform no additional navigation to return to eProcurement. This diagram illustrates the flow of information between PeopleSoft and a third-party supplier's website when the transparent punchout feature has been enabled:

This diagram illustrates the flow of information between PeopleSoft eProcurement and a third-party supplier's website.



Notes on the transparent punchout process flow:

- The PeopleSoft Integration broker establishes a connection to the external supplier sites and sends a XML search request document to them using a multi-threading schema.
- The supplier's website authenticates the eProcurement requester before generating search results.

Note: The transparent punchout feature involves integration with another website. This requires set up steps within the supplier's website in addition to set up steps within PeopleSoft.

Setting Up Suppliers for Direct Connect

There are several tasks that need to be completed before a supplier is enabled for direct connect.

1. Exchange contact information with the supplier.
2. Execute contractual agreements that are required between the supplier and your organization.

3. Set up the direct connect supplier as a PeopleSoft supplier.

See “Understanding Supplier Maintenance” (PeopleSoft Source to Settle Common Information)

Obtaining Authentication From the Supplier

These steps describe the setup for direct connect suppliers:

1. The supplier creates an account for your organization.
2. Your organization's administrator and the supplier establish an organization wide password (shared secret) that authenticates XML service operations from eProcurement.
3. The supplier provides your organization with a URL, which is used when setting up the Supplier Information page.

Creating a Supplier Profile

If the supplier is not already one, you need to create it. These are the fields for use when creating a linked supplier definition:

- **Supplier SetID.**
- **Supplier ID.**
- **Supplier Location.**

Note: Before you save an eProcurement requisition, you must first establish the supplier as a PeopleSoft supplier. After you establish the supplier as a supplier, the supplier ID is saved on the requisition line. When the requisition is converted to a purchase order, the supplier is listed as the supplier on the purchase order.

See “Understanding Supplier Maintenance” (PeopleSoft Source to Settle Common Information)

Note: SameSite prevents the browser from sending the cookie along with cross-site requests. The main goal is mitigating the risk of cross-origin information leakage. It also provides some protection against cross-site request forgery attacks. Possible values for the flag are *None*, *Lax* or *Strict*. This is being implemented by all the browsers, but Google Chrome is the first to make SameSite attribute to *Lax* by default (if cookie is missing SameSite in its attribute, browser will treat it as being set to *Lax*). With SameSite-Lax, the cookie is only sent on Same-site requests or top-level navigation with a safe HTTP method. That is, it will not be sent with cross-domain POST requests or when loading the site in a cross-origin frame. This changed behavior by the browsers will be causing some repercussion in eProcurement punchout and punchback features.

PeopleSoft cookies are not included in the ePro vendor's POST back to PeopleSoft. Without cookies PS is unable to determine the user context and other relevant session information so PS throws the user out to the login page. To handle this scenario, changes are done in PeopleTools.

For eProcurement punchout and punchback features, configure Web Profiles by adding following Custom Property:

Property Name: *Repost1*, Validation Type: *String*, and Property Value: *s/WEBLIB_PV_DC.PV_ISCRIPT_LIB.FieldFormula.IScript_DCCatcher;http://:*

If *https* is being used, then use *https*. Hostname and port are to be replaced by proper Load Balancer values by customers.

For more information on configuring Web Profiles for SameSite requirements, see:

*PeopleTools: Portal Technology***Page Used to Set Up Suppliers for Direct Connect**

Page Name	Definition Name	Usage
Supplier Information- Summary Page	VNDR_ID1_SUM	Create new supplier profiles.

Note: The size of the image added in the supplier information page should not exceed 75 x 75 pixels.

Setting Up PeopleSoft Integration Broker for Direct Connect

PeopleSoft is delivered with many enterprise integration points (EIPs) to send and receive data with a third-party system or another Oracle application. EIPs within the PeopleSoft Integration Broker can be used to communicate between PeopleSoft eProcurement and a supplier's website, or a marketplace. Before data can be passed between PeopleSoft and the supplier, the Integration Broker elements must be set up and activated. For some EIPs, the Integration Broker elements have already been created by PeopleSoft and placed in the sample data. For other EIPs, you must create the Integration Broker elements using the sample data as a model. Integration Broker elements include:

- Service operations
- Routings
- Nodes
- Transformations

To activate an EIP that has already been set up in sample data, basic steps include:

1. Activating the service operation.
2. Activating the service operation routings.
3. Verifying the routing definition parameters.
4. Verifying the node from the routing is active.

To create new Integration Broker elements for an EIP that has not been set up in sample data, basic steps include:

1. Creating a node.
2. Creating a routing within the node.
3. Activating the service operation routing.
4. Verifying the routing definition parameters.
5. Activating the service operation.

6. Verifying the node from the routing is active.

The following table lists the Integration Broker elements that are delivered with the PeopleSoft sample data. Use these elements to set up your EIPs and refer to the setup instruction in “Setting Up Service Operations” (PeopleSoft Supply Chain Management Integration).

Integration Broker Elements	Punchout to Supplier Websites	Transparent Punchout to external suppliers
Service Operation	PV_DC_CONNECT_REQST service operation	PV_TPO_REQST
Messages	PV_DC_CONNECT_REQST message (authentication on start of direct connect session) PV_DC_CONNECT_RESP message (response from supplier of authentication request)	PV_TPO_REQST (outbound message) PV_TPO_RESP (inbound message)
Node	(Create a node)	(Create a node)
Routing	PV_DC_CONNECT_REQST routing can be altered to connect to a supplier's website	PV_TPO_CONNECT
Transformations (Transforms)	PV_DC_POSR (direct connect request) PV_DC_POSRSP (direct connect response)	PV_TPO_REQST (outbound request) PV_TPO_RSP (inbound response)

To set up Transparent Punchout to a third-party supplier, use the Integration Broker elements from the Transparent Punchout to supplier website as a model to build your necessary elements. Be sure to use the same transformations.

Pages Used to Set Up PeopleSoft Integration Broker for Direct Connect

Page Name	Definition Name	Usage
<u>Service Operations - General Page</u>	IB_SERVICE	Define a new service operation or activate an existing service operation.
<u>Service Operations - Routings Page</u>	IB_SERVICERTNGS	Activate routing definitions used on the service operation.
<u>Node Definitions Page</u>	IB_NODE	Create a new node or activate an existing node for each linked supplier that you utilize with direct connect.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Connectors Page</u>	IB_NODECONN	Set up node connectors that represent the direct connect node. This page enables you to associate gateways and connectors to a node.
<u>Routing Definitions Page</u>	IB_ROUTINGDEFN	Set up a routing that is associated with the direct connect node.
<u>Routings - Parameters Page</u>	IB_ROUTINGDEFNDOC	Set up routing parameters.

PeopleTools: Integration Broker

Service Operations - General Page

Use the Service Operations - General page (IB_SERVICE) to define a new service operation or activate an existing service operation.

Navigation:

PeopleTools > Integration Broker > Integration Setup > Service Operations > General

This example illustrates the fields and controls on the Service Operations - General page.

The screenshot displays the 'General' tab of the Service Operations configuration page. Key elements include:

- Service Operation:** PV_DC_CONNECT_REQST
- Operation Type:** Synchronous
- *Operation Description:** DirectConnect PunchOut Reqst
- Operation Comments:** (Empty text area)
- Owner ID:** eProcurement
- Operation Alias:** (Empty text field)
- Security Options:**
 - ☐ User/Password Required
 - *Req Verification:** None
 - ☐ Used with Think Time Methods
- Default Service Operation Version:**
 - *Version:** VERSION_1
 - Version Description:** DirectConnect PunchOut Reqst
 - Version Comments:** (Empty text area)
 - ☒ Default, ☐ Active
- Runtime Schema Validation:**
 - ☐ Request Message
 - ☐ Response Message
 - ☐ Non-Repudiation
- Routing Actions Upon Save:**
 - ☐ Generate Any-to-Local
 - ☐ Generate Local-to-Local
 - ☒ Transactional
- Message Information:**
 - Type:** Request
 - Message.Version:** PV_DC_CONNECT_REQST.VERSION (with a search icon and 'View Message' link)
 - Type:** Response
 - Message.Version:** PV_DC_CONNECT_RESP.VERSION_1 (with a search icon and 'View Message' link)
- Buttons:** Save, Return to Service, Add Version

A service operation in the PeopleSoft system contains the processing logic for an integration and determines if the integration is to be processed synchronously or asynchronously. A service operation definition contains the following definitions:

- *Message:* A message contains the payload of the integration.
- *XML message schema:* Message schemas provide the physical description of the data that is being sent, including descriptions of fields, field types, field lengths, and so on.
- *Routing:* A routing definition specifies the direction of the integration (inbound or outbound), routing alias names, transformations, and more.

PeopleSoft delivers service operations in PeopleSoft Integration Broker with a default status of *Inactive*. You must activate each service operation before attempting to send or receive data. To activate a service operation, go to the General tab of the Service Operations component and select the Active check box for the service operation version.

To setup the service operations used for direct connect suppliers, use the information in this table and refer to the setup instructions in “Setting Up Service Operations” (PeopleSoft Supply Chain Management Integration).

Service Operation	Direction and Type	Messages	Integrates With
PV_DC_CONNECT_REQST	Outbound Synchronous	PV_DC_CONNECT_REQST and PV_DC_CONNECT_RESP	Punchout to third-party supplier websites

To setup the service operations used for DirectConnect PunchOut via OBN, use the information in this table.

Service Operation	Direction and Type	Messages	Integrates With
PV_DC_OBN_REQST	Outbound Synchronous	PV_DC_OBN_REQST, VERSION_1 and PV_DC_OBN_RESP.VERSION_1	Punchout to third-party supplier websites via OBN

Service Operations - Routings Page

Use the Service Operations - Routings page (IB_SERVICERTNGS) to activate routing definitions used on the service operation.

Navigation:

PeopleTools > Integration Broker > Integration Setup > Service Operations > Routings

This example illustrates the fields and controls on the Service Operations - Routings page.

General | Handlers | **Routings**

Service Operation PV_DC_CONNECT_REQST
 Default Version VERSION_1
☐ User Exception

Note This user exception status is applicable only if an outbound routing cannot be determined. If a valid outbound routing can be determined then the user exception status on the actual routing will be used.

Routing Name

Selected	Name	Version	Operation Type	Sender Node	Receiver Node	Direction	Status	Results
☐	PV_DC_CONNECT_REQST	VERSION_1	Synch	CA920DVL	PSFT_XOUTBND	Outbound	Inactive	
☐	EXCH_ORACLE	VERSION_1	Synch	CA920DVL	PSFT_EXCH_ORACLE	Outbound	Inactive	

[Return to Service](#)

General | Handlers | Routings

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

Note: For DirectConnect PunchOut via OBN, activate the *PV_DC_OBN_REQST* Routings.

Node Definitions Page

Use the Node Definitions page (IB_NODE) to create a new node or activate an existing node for each linked supplier that you utilize with direct connect.

Note: If a node is configured for direct connect purpose, the node name length must be less than or equal to 18 characters.

Navigation:

- **eProcurement > Administer Procurement > Maintain Supplier Integration > Integration Broker Node Definitions**
- PeopleTools, Integration Broker, Integration Setup, Nodes

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

The screenshot shows the 'Node Definitions' page in PeopleTools. The page has a tabbed interface with 'Node Definitions' selected. The form contains the following fields and controls:

- Node Name:** PSFT
- *Description:** Server
- *Node Type:** PIA (dropdown menu)
- *Authentication Option:** None (dropdown menu)
- *Default User ID:** (text field with a search icon)
- Hub Node:** (text field with a search icon)
- Master Node:** (text field with a search icon)
- Company ID:** (text field)
- IB Throttle Threshold:** (text field)
- Image Name:** (text field with a search icon)
- Codeset Group Name:** (text field with a search icon)
- Default Local Node:** ☐
- Local Node:** ☐
- Active Node:** ☒
- Non-Repudiation:** ☐
- Segment Aware:** ☐
- Save:** (button)

For the direct connect feature, a node represents the direct connect supplier. Nodes are locations from which the system sends or receives service operations. Nodes can also be an application, a database, or a server. Multiple nodes can share the same local gateway, which might be the only gateway you will need for all integrations. When a node is linked to a particular service operation, the relationship is called a routing.

Set up a node for each direct connect supplier. For those suppliers who support both Punchout and Transparent Punchout, it is required to set up two nodes, one for each, as the supplier URLs are typically different.

The sample data delivered with the system includes:

- The PSFT_EXCH_ORACLE node. This node is designed for access to the Exchange.oracle.com website using Punchout.

- The PSFT_TPO_EXCH_ORACLE node. This node is designed for access to the Exchange.oracle.com website using Transparent Punchout.
- The PSFT_ORACLE_SUPPLIER_NETWORK node. This node is designed for Punchout using OBN.

For the above nodes, you will need to provide the desired exchange environment URL address and then activate the node.

Field or Control	Description
Node Type	For direct connect suppliers, select <i>External</i> .
Active Node	Select to activate the node. Verify the Active Node check box has been selected for the node used in the routings that you activated on your Service Operations-Routings page.
WSIL URL	Enter the desired exchange environment URL address.

See *PeopleTools: Integration Broker*

Connectors Page

Use the Connectors page (IB_NODECONN) to set up node connectors that represent the direct connect node.

This page enables you to associate gateways and connectors to a node.

Navigation:

- **eProcurement > Administer Procurement > Maintain Supplier Integration > Integration Broker Node Definitions**

Click the Connectors tab.

- PeopleTools, Integration Broker, Integration Setup, Nodes

Click the Connectors tab.

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

Enter these field values that are specific to eProcurement:

Field or Control	Description
Gateway ID	Select the gateway ID that represents your local gateway. PeopleSoft eProcurement requires at least one local gateway through which it can send and receive service operations.
Connector ID	Select <i>HTTPTARGET</i>

See *PeopleTools: Integration Broker*

Routing Definitions Page

Use the Routing Definitions page (IB_ROUTINGDEFN) to set up a routing that is associated with the direct connect node.

Navigation:

- **eProcurement > Administer Procurement > Maintain Supplier Integration > Integration Broker Routing Definitions**
- PeopleTools, Integration Broker, Integration Setup, Routings

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

The screenshot shows the 'Routing Definitions' page with the following fields and controls:

- Routing Name:** ACTUAL_TIME_ADD
- *Service Operation:** ACTUAL_TIME_ADD
- Version:** VERSION_1
- *Description:** Actual Payable Time Message
- Comments:** (Empty text area)
- *Sender Node:** ~ANY~
- *Receiver Node:** PV920DVL
- Delay Processing:** (Empty text field)
- Operation Type:** Asynchronous - One Way
- Owner ID:** Projects (Dropdown menu)
- Active:** ☐
- System Generated:** ☐
- Unordered Segments:** ☐
- Schema Validation Details:** ☐
- Graphical View:** (Link)
- Save:** (Button)

At the bottom, there are links: [Routing Definitions](#) | [Parameters](#) | [Routing Properties](#)

When a node is linked to a particular service operation, the relationship is called a routing. Each integration requires at least one routing at each PeopleSoft Integration Broker node. One node uses a routing to send a message, and one or more nodes use routings to receive the message. The sending node might apply a routing with different parameters than those applied by the nodes that receive the message, with respect to routing, transmission type, message structure, or message content.

There are four routings that are delivered in the sample data for direct connect:

- The PV_DC_CONNECT_REQST routing can be altered to connect to a supplier's website.
- The EXCH_ORACLE routing is designed to connect to the Exchange.oracle.com website using Punchout.
- The PV_TPO_CONNECT routing is designed to connect to the Exchange.oracle.com website using Transparent Punchout. Use this routing as a model when creating routings for other Transparent Punchout suppliers.
- PV_DC_OBN_REQST routing is designed to connect to OBN for Punchout.

To connect to another third-party supplier, create and activate a new routing. Create one routing for each node/supplier.

Enter these field values that are specific to eProcurement:

Field or Control	Description
Routing Name	Add a routing name that represents the direct connect supplier. It is suggested that you keep this value the same as the Node Name for the direct connect supplier.
Service Operation	Enter <i>PV_DC_CONNECT_REQST</i> for Punchout suppliers. Enter <i>PV_TPO_REQST</i> for Transparent Punchout suppliers. Enter <i>PV_DC_OBN_REQST</i> for Punchout via OBN.
Sender Node	Enter the default local node. The default local node represents who is sending the request.
Receiver Node	Enter the direct connect supplier node.
Object Owner ID field	Select <i>eProcurement</i> .

See *PeopleTools: Integration Broker*, “Managing Routing Definitions”.

Routings - Parameters Page

Use the Routings - Parameters page (IB_ROUTINGDEFNDOC) to set up routing parameters.

Navigation:

- **eProcurement > Administer Procurement > Maintain Supplier Integration > Integration Broker Routing Definitions**

Click the Parameters tab.

- PeopleTools, Integration Broker, Integration Setup, Routings

Click the Parameters tab.

This example illustrates the fields and controls on the Routing Parameters page.

[Routing Definitions](#)
[Parameters](#)
[Connector Properties](#)
[Routing Properties](#)

Routing Name PV_DC_CONNECT_REQST

Service Operation PV_DC_CONNECT_REQST

Service Operation Version VERSION_1

Sender Node PV920DVL

Receiver Node PSFT_XOUTBND

Parameters

Type Inbound Response

External Alias PV_DC_CONNECT_RESP

Alias References

Message.Ver into Transform 1 PV_DC_CONNECT_RESP.VERSION_1

Transform Program 1 PV_DC_POSRSP

Transform Program 2

Message.Ver out of Transforms PV_DC_CONNECT_RESP.VERSION_1

Type Outbound Request

External Alias PV_DC_CONNECT_REQST

WS Security

Alias References

Message.Ver into Transform 1 PV_DC_CONNECT_REQST.VERSION_1

Transform Program 1 PV_DC_POSR

Transform Program 2

Message.Ver out of Transforms PV_DC_CONNECT_REQST.VERSION_1

Save

[Routing Definitions](#)
[Parameters](#)
[Connector Properties](#)
[Routing Properties](#)

Confirm that the external alias names in the External Alias fields for the routing are correct. When sending or receiving data, the Integration Broker determines which routing to use by referring to the external alias name, not the routing name. For routings already defined in the sample data, the External Alias fields and the transformations have already been defined.

Direct Connect Supplier Transformations

Transformations are used to convert an XML document from one format to another. Since the transformation is associated with a relationship, there can be a separate transformation for each supplier relationship. The system creates transformations using the Application Engine definition.

The system uses a step type of XSLT along with PeopleCode steps to perform the transformation. XSLT documents are tools that hold the structure of a document, as well as the rules of how to transform a XML document from one format to another.

There should be at least one transformation for each message. This transformation follows the standard defined for each XML document (for example, PunchoutOrder Message).

For some suppliers, you might need to change the standard transformation to support extrinsic values or other departures from the standard. In most cases, the modified logic should be saved as a separate name from the standard transformation, and the newly named transformation should be associated with the relationship.

When you create a transformation that follows a newly published version of the standard, you should save the new transformation with the standard's version name suffixed at the end (for example, PunchoutOrder Message). You can use only 10 characters. When determining whether to use PeopleCode or XSLT, make the decision on a transformation-by-transformation basis.

For Punchout to a direct connect supplier (the PV_DC_CONNECT_REQST routing), the following transformations are already created in PeopleSoft Application Designer:

- PV_DC_POSRSP (inbound request)
- PV_DC_POSR (outbound request)

For Punchout to exchange.oracle.com (the EXCH_ORACLE routing), the following transformations are already created in PeopleSoft Application Designer:

- PV_RSP_EXCH (inbound request)
- PV_POSR_EXCH (outbound request)

For Transparent Punchout to exchange.oracle.com (the PV_TPO_CONNECT routing), the following transformations are already created in PeopleSoft Application Designer:

- PV_TPO_RSP (inbound request)
- PV_TPO_RQST (outbound request)

Add the PV_TPO_RQST and PV_TPO_RSP transformations to any new routings that you create for third-party suppliers using Transparent Punchout.

For DirectConnect PunchOut via OBN (the PV_DC_OBN_REQST routing), the following transformations are already created in PeopleSoft Application Designer:

- PV_DC_OBNRSP (inbound request)
- PV_DC_OBNREQ (outbound request)

Note: The Roundtrip direct connect method does not use transformations.

See *PeopleTools: Integration Broker*

Setting Up PeopleSoft eProcurement for Direct Connect

Within PeopleSoft eProcurement, the pages used to set up the direct connect feature are eProcurement Installation Options page, Direct Connect Methods page, Linked Suppliers component, and Supplier Value Cross-Reference page.

Setting Up OBN Supplier Integration with eProcurement

Follow these steps to set up the Oracle Business Network (OBN) supplier integration with eProcurement:

1. Use **Node Definitions** page (PeopleTools > Integration Broker > Integration Setup > Node Definitions) to Configure the *PSFT_ORACLE_SUPPLIER_NETWORK* Node for OBN Punchout.

- a. On the **Node Definitions** tab, enable the **Active Node** check box and click **Save**.

- b. Navigate to the **Routings** tab and select *PV_DC_OBN_REQST* link.

On the **IB Routing Definitions** page, navigate to **Connector Properties** tab and update the **PRIMARYURL** value to *https://businessnetwork.oracle.com/punchout/punchoutloginserver*. Click **Save** and then **Return** to Routings tab.

- c. On the **Routings** tab, select the associated checkbox for *PV_DC_OBN_REQST* and click **Activate Selected Routings**. The status changes to **Active** and Result column displays **Success**.

Save the configuration.

For more details, see [Node Definitions Page](#).

2. Use the **Linked Suppliers** page (eProcurement > Administer Procurement > Maintain Supplier Integration > Linked Suppliers) to add the Direct Connect Supplier for OBN Punchout.

- a. Click **Add a New** value. On the **Add a New Value** page, select the **Linked Supplier Type** as **Direct Connect supplier**, enter SetID, Supplier ID, Supplier Location, and then click **Add**.

- b. On the **Link Suppliers** tab, select the **Direct Connect Method** value as *PUNCHOUTVIAOBN*. Once selected, **OBN Buyer Node** field appears.

- c. Select *PSFT_ORACLE_SUPPLIER_NETWORK* for **OBN Buyer Node**.

- d. Now, navigate to **Supplier Properties** tab and click **Load Direct Connect Properties** button. It loads all the OBN punchout properties on the Details table. Enter the values for the following properties.

<i>Property Name</i>	<i>Property value</i>
ALLOW_EDIT	Y
ALLOW_PO_CHNG	Y

Property Name	Property value
ALLOW_SHIPPING_EDIT	Y
ALLOW_VIEW	Y
CATEGORY_ID	Default category for this vendor.
CATEGORY_SETID	Default SETID for this vendor. Note: It identifies the category SetID for external catalog imports.
LOAD_PORTAL	N
OBNPassword	Enter the Password corresponding to the Buyer account in OBN.
OBNUserName	Enter User Name corresponding to the Buyer account in OBN.

Note: CATEGORY_ID and CATEGORY_SETID are mandatory fields.

Click Save.

For more details, see [Linked Suppliers Page](#) and [Supplier Properties Page](#).

- e. Navigate to **Linked Suppliers** tab and click **Sync Supplier** button. **Sync Supplier** page appears with the list of **Punchout Catalogs**. Select the required Catalog Name and click Ok.
- f. The added catalogs appear under **Punchout Catalogs** section.

Click **Create Node** and then enter name and description for the Node.

Once entered, the same name appears on the Direct Connect Node field.

For more details about Punchout Catalogs, see [Configuring Punchout Catalogs](#).

- g. Select the **Active Punchout** checkbox for the added line and **Save** the configuration.

The added OBN Punchout supplier is available on the fluid Create Requisition Punchouts page (Employee Self Service > eProcurement > Create Requisition > Punchouts).

Pages Used to Set Up PeopleSoft eProcurement for Direct Connect

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
eProcurement Installation Options Page	PV_INSTALLATION_PV	At the installation level, activate the transparent punchout feature for your PeopleSoft eProcurement application. In addition, use this page to determine if punchout, roundtrip, or transparent punchout items can be used as favorites or on item templates. This page also determines the number of rows to return from a search that uses transparent punchout.
Direct Connect Methods Page	PV_DC_TYPE	Define Direct Connect integration methods and standards
Linked Suppliers Page	PV_MS_SEC_SUPPLIER	Associate supplier ID, supplier location, and the direct connect node together.
Supplier Properties Page	PV_MS_SEC_SUP_NV	Set up supplier properties, which determines how the supplier interacts with the direct connect method.
Supplier Value Cross-Reference Page	PV_MERCHANT_XREF	Map field values between supplier fields and your fields by creating a cross-reference between the item categories and the values that are returned by Punchout direct connect suppliers.

eProcurement Installation Options Page

Use the eProcurement Installation Options page (PV_INSTALLATION_PV) to at the installation level, activate the transparent punchout feature for your PeopleSoft eProcurement application.

In addition, use this page to determine if punchout, roundtrip, or transparent punchout items can be used as favorites or on item templates. This page also determines the number of rows to return from a search that uses transparent punchout.

Navigation:

eProcurement > Administer Procurement > Maintain Overall System Options > eProcurement Installation Options

The eProcurement Installation Options page is used to:

- Enable the Transparent Punchout feature.
- Allow direct connect items to be saved as favorites or on a template list.
- Determine the number of items to request in a Transparent Punchout search.

See [Setting Up Installation Options for Fluid eProcurement](#).

See [Create Requisition — Favorites Page](#).

See [Create Requisition — Templates Page](#).

Direct Connect Methods Page

To set up direct connect, use the Direct Connect Methods (PV_DC_TYPE) component.

Use the Direct Connect Methods page (PV_DC_TYPE) to define Direct Connect integration methods and standards.

Navigation:

eProcurement, Administer Procurement, Maintain Supplier Integration, Direct Connect Methods

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

Direct Connect Methods

Direct Connect Method

Root Package ID

Application Class Path

Description

Properties		Personalize	Find	View All	First	1-14 of 14	Last
	Property Name	Description					
1	ALLOW_EDIT	'Y' if vendor allows editing of items via PunchOut					+ -
2	ALLOW_PO_CHNG	'Y' if vendor allows changes to Dispatched Purchase Order					+ -
3	ALLOW_SHIPPING_EDIT	'Y' if vendor allow shipping info. while editing					+ -
4	ALLOW_VIEW	'Y' if vendor allows viewing of item descriptions					+ -
5	CATEGORY_ID	Default Category ID for this vendor					+ -
6	FROM_DOMAIN	Header.From.Credential.domain					+ -
7	FROM_IDENTITY	Header.From.Credential.Identity					+ -
8	KEYWORDS	Search keywords					+ -
9	LOAD_PORTAL	Load Portal upon return from vendor's site ('Y' / 'N')					+ -
10	SENDER_DOMAIN	Header.Sender.Credential.domain					+ -
11	SENDER_IDENTITY	Header.Sender.Credential.Identity					+ -
12	SHARED_SECRET	Header.Sender.Credential.SharedSecret					+ -
13	TO_DOMAIN	Header.To.Credential.domain					+ -
14	TO_IDENTITY	Header.To.Credential.Identity					+ -

[Return to Administer Procurement](#)

Field or Control	Description
Direct Connect Method	Identifies the type of connection to the supplier's website. Delivered options include: - PUNCHOUT: to access a supplier's website using cXML - ROUNDTRIP: to access a supplier's website using OCI (Open Catalog Interface). - ROUNDTRIP_MP: to access marketplace using roundtrip.

Field or Control	Description
Root Package ID	Identifies the PeopleSoft application package used for this direct connect method.
Application Class Path	Identifies the PeopleSoft application class within the above application package.
Properties	Lists property values that the system uses for this direct connect method.

Linked Suppliers Page

Use the Linked Suppliers page (PV_MS_SEC_SUPPLIER) to associate supplier ID, supplier location, and the direct connect node together.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Linked Suppliers > Linked Suppliers

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

Linked Suppliers

Linked Suppliers

Supplier Properties

Type Direct Connect Supplier

SetID SHARE CORPORATE SETID

Supplier ID 0000000051 Location 1

EDX PO Dispatch Type

PO Dispatch Node

Direct Connect Method

[Return to Maintain Supplier Integration](#)
[Return to Administer Procurement](#)
[UOM Cross-Reference](#)
[Category Cross-Reference](#)

Use this page to associate suppliers to nodes and then associate suppliers and nodes to their direct connect method. Then use the **Supplier Properties** tab to store authentication and behavioral properties specific to the method for this supplier and node.

Enter these field values that are specific to Direct Connect Suppliers that use PUNCHOUT:

Field or Control	Description
Type	Select <i>DirectConnect Supplier</i> to set up: • Punchout for a single direct connect supplier. • Transparent punchout for a single direct connect supplier or a marketplace. • Roundtrip for a single direct connect supplier. Select <i>MarketPlace Supplier</i> to set up a supplier for marketplaces using Perfect Commerce.
Supplier ID	Enter the supplier ID established for your direct connect supplier. The SetID field and the Location field are also part of the supplier definition.
Direct Connect Method	The options are: • <i>ROUNDTRIP</i>: to define a supplier for Roundtrip. • <i>ROUNDTRIP MP</i>: to define a marketplace for Roundtrip. • <i>PUNCHOUT</i>: to define a supplier for Punchout or Transparent Punchout. • <i>PUNCHOUTVIAOBN</i>: to define supplier for OBN Punchout.

Field or Control	Description
Direct Connect Node	Enter the node established for this supplier. Note: This field appears if the Direct Connect Method is EXCH_ORACLE, PUNCHOUT, ROUNDTRIP, or ROUNDTRIP_MP.
OBN Buyer Node and Sync Supplier	Enter the node established for OBN supplier. Once the OBN Buyer Node is entered, click <i>Sync Supplier</i> to load the list of suppliers. Properties configuration is required to load the suppliers. Navigate to Supplier Properties tab to enter the required information. Note: This field appears if the Direct Connect Method is PUNCHOUTVIAOBN. OBNUserName and OBNPassword are required to load supplier information.

See [Linked Suppliers Page](#).

Supplier Properties Page

Use the Supplier Properties page (PV_MS_SEC_SUP_NV) to set up supplier properties, which determines how the supplier interacts with the direct connect method.

Navigation:

Select the Supplier Properties tab from the Linked Suppliers page.

This example illustrates the fields and controls on the Supplier Properties page.

The screenshot shows the 'Supplier Properties' tab in the 'Linked Suppliers' section. It displays the following information:

- Type:** Direct Connect Supplier
- SetID:** SHARE, **CORPORATE SETID:**
- Supplier ID:** USA0000051, **Location:** 1
- Load Direct Connect Properties** button
- Details** section with a table of properties.

	Property Name	Property Value	Description		
1	ALLOW_EDIT	Y	"Y" if vendor allows editing of items via PunchOut	+	-
2	ALLOW_PO_CHNG	Y	"Y" if vendor allows changes to Dispatched Purchase Orders	+	-
3	ALLOW_SHIPPING_I	Y	"Y" if vendor allow shipping info. while editing	+	-
4	ALLOW_VIEW	Y	"Y" if vendor allows viewing of item descriptions via PunchOut	+	-

Use this page to set up or change properties for a direct connect supplier connection. Before defining properties, you should have already discussed descriptions for the fields with the supplier. For example, the authentication paths should be familiar to you because the supplier should have communicated the values they require for these paths in the XML.

Viewing and Editing Requisition Line Items

In addition to connecting to a supplier website to add new requisition line items, the direct connect feature also supports the connection to the supplier's site to view and edit item details for items that have been added to a requisition using direct connect. This is accomplished by using the **Description** link on a requisition line. The **Description** link is available from many pages, and can be used for either viewing the item details or editing item information, such as quantity.

In order to accomplish this, the supplier must be set up with the ability to view and edit items, which is specified on the Supplier Properties page. If the supplier supports items to be viewed and edited, then the application connects to the supplier site and lets the site know whether the user is editing the line or viewing line details. Therefore, in addition to the supplier setup, there is one rule that eProcurement follows in order to determine which behavior (view or edit) to specify to the supplier. If the item **Description** link is in the Create Requisition component, such as the Submit Requisition page, then the user is able to edit the information on the supplier site. All other item description links, such as the links in the Manage Requisition component, are view only.

Note: For Roundtrip items, view mode is the only mode supported. Additionally, in the cXML and Punchout specification, view mode is known as inspect mode.

Punchout and Transparent Punchout

This table lists property values that the system uses for the Punchout and Transparent Punchout direct connect methods:

<i>Property Name</i>	<i>Description</i>
ALLOW_EDIT	Equals Y if supplier allows editing of items using Punchout. This enables users to connect back to the supplier's website to update their shopping carts. This is a behavioral property.
ALLOW_PO_CHNG	Equals Y if supplier allows changes to dispatched purchase orders.
ALLOW_SHIPPING_EDIT	Equals Y if supplier allow editing of shipping information. This enables customers to include or exclude shipping info while editing a Direct Connect item. This is a behavioral property.
ALLOW_VIEW	Equals Y if supplier allows viewing of item descriptions using Punchout. This is a behavioral property.
CATEGORY_ID	Default category for this supplier. This is a behavioral property.
CATEGORY_SETID	Default SETID for this vendor. Note: It identifies the category SetID for external catalog imports.
FROM_DOMAIN	Header.From.Credential.domain. This is an authentication property.
FROM_IDENTITY	Header.From.Credential.identity. This is an authentication property.
KEYWORDS	Search keywords. This is a behavioral property.
LOAD_PORTAL	Load portal upon return from supplier's site, (Y or N). This is a behavioral property.
SENDER_DOMAIN	Header.Sender.Credential.domain. This is an authentication property.

Property Name	Description
SENDER_IDENTITY	Header.Sender.Credential.identify. This is an authentication property.
SHARED_SECRET	Header.Sender.Credential.Shared Secret. This is an authentication property.

Note: Make sure that you select the PUNCHOUT value for the **Direct Connect Method** field on the Linked Suppliers page to populate Punchout property values on this page. When you click the **Load Direct Connect Properties** button, the system populates this page with predefined properties for the Punchout method.

Roundtrip

Setting up Roundtrip methods are similar to those for Punchout. The key differences between Roundtrip and Punchout are the authentication method, format of the shopping cart data, and the format of the purchase order.

Use this page to set up or change properties for a Roundtrip supplier connection. Before defining properties, you should have already discussed descriptions for the fields with the supplier. For example, the authentication paths should be familiar to you, because the supplier should have communicated the values they require for these paths.

Note: Make sure that you select the *ROUNDTRIP* value for the **Direct Connect Method** field on the Linked Suppliers page to populate Roundtrip property values on this page. When you click the **Load Direct Connect Properties** button, the system populates this page with predefined properties for the Roundtrip method.

This table describes property values the system uses for the Roundtrip direct connect method:

Property Name	Description
ALLOW_VIEW	Enables the user to connect back out to the supplier's website to view ordered items. (Supplier must support FUNCTION=DETAIL in the outbound request.) This is a behavioral property.
ALLOW_PO_CHNG	Equals Y if supplier allows changes to dispatched purchase orders.
CATEGORY_ID	Default category ID for this supplier. This is a behavioral property.
KEYWORDS	Search keywords. This is a behavioral property.

<i>Property Name</i>	<i>Description</i>
LOAD_PORTAL	Load portal upon return from the supplier's site, (Y or N). This is a behavioral property.
PASSWORD	Password to load into the supplier's Roundtrip website. This is an authentication property.
RT_BUYER_MPID	Buyer marketplace ID. This is an authentication property.
RT_BUYER_ORGANIZATION	Buyer organization name. This is an authentication property.
RT_LANGUAGE	Buyer language. This is an authentication property.
RT_OCI_VERSION	Version of Roundtrip and OCI. This is an authentication property.
USERNAME	User name to log onto supplier's Roundtrip website. This is an authentication property.

Punchout Via OBN

Punchout Via OBN setup requires authentication. After defining the OBN Buyer Node, when you click Sync Supplier to load the list, it requires OBUserName and OBNPassword. When you click the **Load Direct Connect Properties** button, on the Supplier Properties, the system populates this page with predefined properties for the PUNCHOUTVIAOBN Direct Connect Method.

Note: Use this page to set up or change properties for a Punchout Via OBN supplier connection. Before defining properties, you should be aware of the OBN Credentials. For example, the OBUserName and OBNPassword should be familiar to you, because this is the Buyer account information using which PeopleSoft connects to OBN.

Multiple punchout catalogs can be associated with one Supplier location using OBN.

<i>Property Name</i>	<i>Description</i>
ALLOW_EDIT	Equals Y if supplier allows editing of items using Punchout. This enables users to connect back to the supplier's website to update their shopping carts. This is a behavioral property.
ALLOW_PO_CHNG	Equals Y if supplier allows changes to dispatched purchase orders.

Property Name	Description
ALLOW_SHIPPING_EDIT	Equals Y if supplier allows editing of shipping information. This enables customers to include or exclude shipping info while editing a Direct Connect item. This is a behavioral property.
ALLOW_VIEW	Equals Y if supplier allows viewing of item descriptions using Punchout. This is a behavioral property.
CATEGORY_ID	Default category for this supplier. This is a behavioral property.
CATEGORY_SETID	Default SETID for this vendor. Note: It identifies the category SetID for external catalog imports.
KEYWORDS	Search keywords. This is a behavioral property.
LOAD_PORTAL	Load portal upon return from supplier's site, (Y or N). This is a behavioral property.
OBNPassword	Password corresponding to the Buyer account in OBN.
OBNUserName	User Name corresponding to the Buyer account in OBN.

Related Links

[Setting Up Marketplace Suppliers and Buyers](#)

Configuring Punchout Catalogs

Use Punchout Catalogs grid to create node and activate the Punchout.

For OBN Punchout, after entering the Direct Connect Properties, on the Supplier Properties page, click *Sync Suppliers* to view the list of available Punchout Catalogs. Add the Punchout Catalogs and configure.

Note: This configuration is applicable only for OBN. Multiple punchout catalogs can be associated to one Supplier location using OBN.

This example illustrates the fields and controls on the Linked Suppliers page - Punchout Catalogs grid. You can find definitions for the fields and controls later on this page.

Linked Suppliers Supplier Properties

Type: Direct Connect Supplier
SetID: SHARE CORPORATE SETID
Supplier ID: 0000000051 Location: 1

EDX PO Dispatch Type:
PO Dispatch Node:
Direct Connect Method: PUNCHOUTVIAOBN
OBN Buyer Node: PSFT_ORACLE_SUPPLIER_NETWORK

Punchout Catalogs

	Logo	Punchout Name	Description	Direct Connect Node	Create Node	Active Punchout	Keywords	Sync UOM & Category
1		CDW-OBN	CDW via OBN for Peoplesoft Demo		Create Node	☐	Keywords	Sync UOM & Category

Return to Maintain Supplier Integration Return to Administer Procurement UOM Cross-Reference Category Cross-Reference

Linked Suppliers | Supplier Properties

Field or Control	Description
Direct Connect Node	You can select an existing Direct Connect Node or create a new one. If creating a new node using Create Node option, the node name appears here.
Create Node	Click to create a new node. Enter the Node name and Node Description. The Node name and Description should be unique. Note: The Create Node is visible only if the user has access to the Integration Node Definition page.
Update Node	Once a Node is created, Update Node link appears. Click this link to navigate to Integration Node Definition page to update the node details. Note: The Update Node is visible only if the user has access to the Integration Node Definition page.
Active Punchout	Select this check box to enable punchout for the selected supplier. Note: The Active Punchout check box is available to select if a node is added to the supplier row.
Keywords	Enter the keyword for the punchout. This is comparable to the keyword property found in the supplier properties tab specific to the Punchout catalog. During Punchout Catalog association, PeopleSoft imports the keywords defined in the OBN system.

Field or Control	Description
Sync UOM and Category	Click to sync the UOM and category. Once the supplier attaches a new file to the OBN system, this will import that list of UOMs and Categories and create a row in the Supplier Value Cross reference page. Note: The sync happens automatically during the initial Punchout Catalog association. The purpose of the button is to sync later when there is any update in the UOM/Category file attached to OBN by the supplier.

Supplier Value Cross-Reference Page

To set up direct connect, use the Supplier Value Cross-Reference (PV_MERCHANT_XREF) component.

Use the Supplier Value Cross-Reference page (PV_MERCHANT_XREF) to map field values between supplier fields and your fields by creating a cross-reference between the item categories and the values that are returned by Punchout direct connect suppliers.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Supplier Value Cross-Reference

This example illustrates the fields and controls on the Supplier Value Cross-Reference page. You can find definitions for the fields and controls later on this page.

When using direct connect, there are times that the data sent by the supplier needs to be translated to the desired data value for the PeopleSoft database. Use this page to map PeopleSoft eProcurement values to values with the same meaning but with different field names that the supplier uses. The most common use of this mapping is when a unit of measure, such as dozen is described by PeopleSoft as DZ and the supplier as DOZ.

There are several fields that might need to have some translation, or mapping, done. These fields may include:

- Unit of Measure
- Currency code
- Country Code

- Category ID
- Supplier ID

Translation always occurs after the item data is received from the supplier and transformed into the PV_DC_ITEMS (Direct Connect Items) message format. On each line of this message, every field in the PV_DC_REQ_LINE (Direct Connect Requisition Line) record is examined to determine if translation is required. The system then queries the data within the Supplier Values Cross-Reference page to determine if the field name and value passed need translation. If the system finds translation is needed, the field is updated with the corresponding **PeopleSoft Value**.

If no data is sent by the supplier for a particular field, you can assign default values. These values are configured on the Supplier Properties page.

The system uses values that you define on this page both for sending and receiving direct connect supplier data. You can add or change the cross references. Before you access this page, you first select the field to which the mapping applies.

Field or Control	Description
Supplier ID	Select the supplier node for which this mapping is to apply.
Supplier Value	Enter the value that the supplier uses to describe this field.
PeopleSoft Value	Enter the value that PeopleSoft uses instead of the direct connect supplier value.
Supplier SetID, Supplier ID and Supplier Location	Select the values for the supplier that you want the system to use when a supplier sends data to PeopleSoft eProcurement.

Setting Up a Supplier Cross-Reference for Punchout or Roundtrip

There are times when the supplier is a marketplace and they broker items from many suppliers. The result of this scenario is a different supplier ID for each item is provided by the supplier. When this happens, the supplier sends only one field value to identify the supplier for the item using direct connect. There are three keys that identify the supplier within PeopleSoft:

- Supplier SetID
- Supplier ID
- Supplier Location

The Supplier Value Cross-Reference page is used to store the mappings from the supplier's value to the three PeopleSoft values.

The system goes through these steps to match supplier IDs for the supplier:

1. The supplier value cross-reference data is queried to determine if there is a matching supplier ID for this supplier.

If there is a match, then, instead of using the **PeopleSoft Value**, all three supplier keys are placed into the PV_DC_ITEMS service operation.

2. If no match is found, then the three supplier keys that are specified as default values in the linked supplier properties are placed into the PV_DC_ITEMS service operation.

Setting Up a Supplier Cross-Reference for Transparent Punchout

When transparent punchout retrieves item data from marketplace, it can retrieve data from multiple suppliers and display the results on the eProcurement requisition. Use the Supplier Value Cross-Reference page to define cross reference values between the VENDOR_ID field in PeopleSoft and the supplier used in marketplace. If a supplier from a marketplace is not cross-referenced with a PeopleSoft supplier ID, then the supplier ID used on the Linked Supplier page to integrate with the marketplace is used in the search results in PeopleSoft.

Setting up a Category Cross-Reference

Category cross-references have their own process. The system goes through these steps to translate a category ID value that is sent by a supplier:

1. The system looks up the **Category** field in the Item Category table to determine if any category codes match the value sent by the supplier.
2. If the value sent by the supplier is not matched, then the supplier cross reference data is queried to determine if there is a matching category ID for this supplier.
3. If the supplier value cross reference does not contain the category either, the default value is taken from the linked supplier properties.

Shared Data Synchronization

To prevent validation errors when requisition information is passed between eProcurement and the direct connect supplier's website, the common control data should use these codes:

Control Data	Standard Used by cXML
Units of measure	UN/CEFACT
Currency codes	ISO 4127
Country codes	ISO 3166
Language codes	ISO 639

Troubleshooting Error Messages for Punchout and Roundtrip

There are several errors that can occur during the direct connect process. This table contains a list of potential errors, and the means to resolve the error.

Error Text Displayed	Description	Resolution
Java exception thrown: java.net.UnknownHostException: <machine name>	The machine specified as the <i>Local Gateway</i> in the Integration Broker configuration cannot be reached.	Change the URL to the Local Gateway in PeopleTools > Integration Broker > Gateways .
There was no response from the supplier's website while attempting to connect Error Details: ... (18036, 3454)	This is thrown by Roundtrip when the Supplier's website is inaccessible.	Contact the supplier to determine if their URL has changed, or if their site is down.
An error occurred while preparing to connect to supplier's website Error Details: (18036, 3459)	An error occurred in Punchout while setting extrinsic elements.	Modify the extended SetReqstExtrinsic() method.
An error occurred while connecting to supplier's website Error Details: (18036, 3455)	This is a generic error, thrown by the Punchout GoToApp() method.	This can be thrown when the PunchoutSetupResponse from the supplier is not a well-formed XML. It can also be thrown prior to that, when filling the message with data in this method.
An error occurred when transferring to the supplier's website Error Details: (18036, 3453)	This error message will only be thrown when there is a problem when redirecting the user to the supplier's website (using the URL that the supplier specifies in the PunchoutSetupResponse).	Contact the supplier to determine if their site is down.
An error occurred while retrieving items from supplier's website Error Details: ... (18036, 3456)	This error will be displayed if there is an error when adding item data into the REQ_LINE fields.	This error requires debugging PeopleCode in the RequisitionContext class, in the FillNewReqLine() or FillExistingReqLine() method.
An error occurred while transforming the items from the supplier Error Details: (18036, 3452)	This message will occur in Punchout when a Transformation Application Engine program, or the LoadItems() method generates an error.	Examine the PunchoutOrderMessage log on the appserver to determine if the supplier is not following the transformation for the Punchout standard. This log can be found on the Application Server in this path: PS_CFG_HOME\appserv\<domain>\files\PV_CXML_PUNCHOUTORDERMESSAGE.txt

<i>Error Text Displayed</i>	<i>Description</i>	<i>Resolution</i>
An error occurred while adding the new items to the requisition Error Details: (18036, 3451)	This error will be displayed in the UpdateXREF() method of the requisition context class, which fills the external item cross-reference rowset with item data from the supplier and the requisition line.	This occurrence is highly unlikely, and would have to be examined on a case by case basis to determine what caused it to happen.
The supplier's website did not return item information. (18036, 3450)	This is thrown by Roundtrip in the LoadItems() method, when the Supplier does not send item information back to eProcurement at the time of checkout, or if the item information was not in a format expected by eProcurement.	Examine the PunchoutOrderMessage log on the appserver to determine if the supplier is not following the transformation for the Punchout standard.

Creating and Managing Order Sheets

Understanding Order Sheets

An order sheet is a list of items on a sheet, where the Supplier, Unit of Measure, Shipping, and Accounting information have already been pre-defined so that a requester does not need to enter or override any of this information while creating a requisition. eProcurement administrators can create order sheets for the authorized GL business units and assign them to different requesters associated to the particular GL business unit. A requester can be authorized to use multiple order sheets from several GL business units.

During requisition entry, a requester can select items from one or more order sheets. Requesters typically accept the default shipping and accounting details. If required, they can modify the details. Thus, order sheets make the requisition process simpler and error-free.

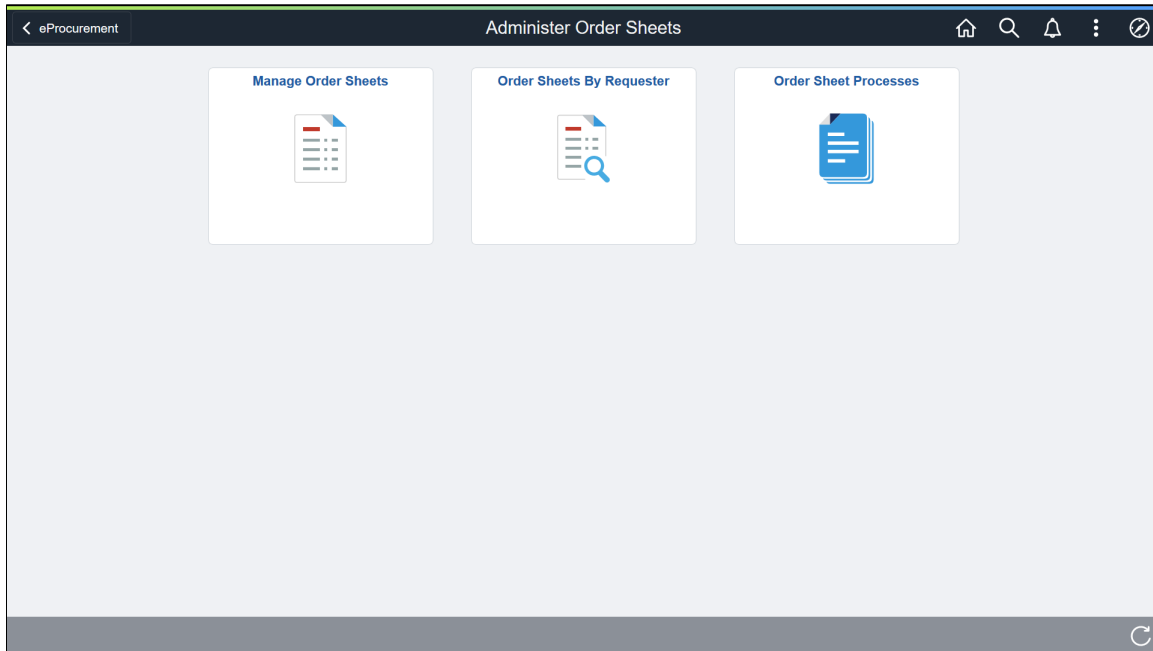
Creating and Managing Order Sheets

eProcurement Administrators can create order sheets for different GL business units at the Set ID level and authorize requesters to the order sheets. To create order sheets and access them, an eProcurement administrator must be assigned to the Permission List *EPPV6500*. To use any new order sheet component, it must be registered as a menu on the Permission Lists page.

You can navigate to the Personalize Homepage, and add the Administer Order Sheets tile to the required home page, if it does not display even after you are assigned to the Permission List.

Use the Administer Order Sheets tile to access the *Manage Order Sheets*, *Order Sheets By Requester*, and *Order Sheet Processes* tiles for creating and managing order sheets.

This example illustrates the fields and controls on the Administer Order Sheets Tiles.



Pages Used to Create and Manage Order Sheets

Page Name	Definition Name	Usage
<u>Manage Order Sheets Page</u>	PV_OS_MANAGE_FL	To create order sheets and search for existing order sheets.
<u>Create Order Sheet Page</u>	PV_OS_CREATE_FL	To create order sheets at the Set ID level for authorized GL business units.
<u>Accounting Information Page</u>	PV_OS_DISTRIB_SCF	To create order sheets with one or more distribution lines.
<u>Mass Change Page</u>	PV_OS_MASS_SCF	To mass update multiple order sheet item details at the same time.
<u>Manage Order Sheets - Search Results Page</u>	PV_OS_CREATE_FL	To search for existing order sheets, edit the details, and perform related actions.
<u>Authorize Order Sheet Page</u>	PV_OS_SECURITY_FL	To authorize requesters to the created order sheet.
<u>Add Requesters Page</u>	PV_OS_SEC_ADD_SCF	To select requesters authorized to the GL business unit and assign them to the order sheets.

Page Name	Definition Name	Usage
Order Sheets By Requester Page	PV_OS_INQUIRY_FL	To search for order sheets by the authorized requesters.
Order Sheet Processes Page	Navigation Collection	To run mass update and mass validate processes.

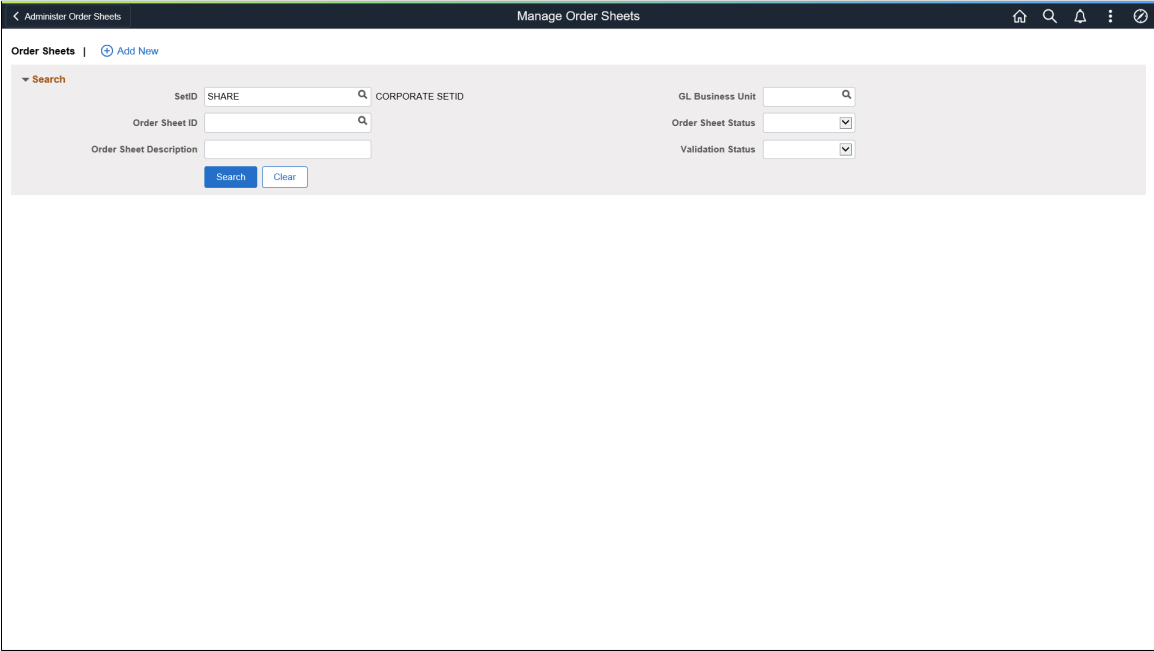
Manage Order Sheets Page

Use the Manage Order Sheets page (PV_OS_MANAGE_FL) to search for existing order sheets and to create order sheets at the Set ID level for the authorized GL business units.

Navigation:

eProcurement > Administrative Tasks > Administer Order Sheets > Manage Order Sheets

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



Field or Control	Description
Add New	Click this link to add new order sheets. For more information on creating a new order sheet, see Create Order Sheet Page .
Search	Click the Search button after entering the required search criteria. The results display existing order sheets.

Create Order Sheet Page

Use the Create Order Sheet page (PV_OS_CREATE_FL) to create order sheets at the Set ID level for the authorized GL business units.

Navigation:

Click the Add New button on the Manage Order Sheets page.

This example illustrates the fields and controls on the Create Order Sheet Page. You can find definitions for the fields and controls later on this page.

Manage Order Sheets

Create Order Sheet

New Order Sheet | Search Existing

Save

*SetIDSHARE

*GL Business UnitUS001

*Order Sheet IDMED_SUPPLIES_01

*Order Sheet StatusOpen

Order Sheet DescriptionMedical Supplies

Order Sheet Items

1 row

Mass Change

Delete

Item Information

Supplier Information

Manufacturer Information

Show All

Item ID	Item Description	Quantity	UOM	Category	Ship To	Validation Status
15025	Medical Day Tripper First Aid Kit	1.0000	EA	MISC		Initial

Field or Control	Description
Set ID	Select the Set ID. It is a mandatory field.
Order Sheet ID	Enter a unique order sheet ID.
Order Sheet Description	Enter an order sheet description.
GL Business Unit	Select the GL business unit. The prompt lists all the business units according to the Set ID.

Field or Control	Description
Order Sheet Status	Select the order sheet status from the options available: <i>Active</i>, <i>Inactive</i>, <i>Open</i>. By default, the order sheet status is <i>Open</i>. Note: The status of an order sheet must be <i>Active</i> to be used while creating a requisition. When the order sheet is completely defined and requesters are authorized to it, set the status to <i>Active</i> so that it will be available to the designated requesters while creating requisitions.

Next, you can enter the item, supplier, and manufacturer details. As you select an item, the tabs automatically populate values (except Ship To) based on the inventory item definition and purchase item attributes.

Item information Tab

Field or Control	Description
Item ID	Enter or select inventory items. You can add as many rows as you wish. The prompt lists items based on the Set ID. Note: An order sheet does not allow you to add an item more than once.
Item Description	Displays a short item description. The item description appears as a hyperlink. Click this link to view more details about the item.
Quantity	Displays the default item quantity. You can modify the value, if required.
UOM	Displays the supplier item UOM by default. You can modify the value, if required. To change the UOM of an order sheet line, click the prompt and select the required UOM. The prompt lists valid supplier and item UOMs. The current selection is highlighted. If the Supplier item UOM is not available, the system accepts the item UOM automatically.
Category	Displays the item category already defined.
Ship To	Enter the location to ship the items. The prompt displays all the available locations based on the Ship To Set ID.

Field or Control	Description
Validation Status	Displays the <i>Initial</i> status by default. Other possible statuses are <i>Valid</i> and <i>Error</i>. If the status is <i>Error</i>, you can click the Error hyperlink to navigate to the Show Validation Errors page and view the details. The page displays a brief description of issues to different lines.
 Add Distribution Lines	Click this icon to navigate to the Accounting Information page, where you can enter the accounting information for the distribution lines.

Supplier Information Tab

Field or Control	Description
Supplier ID	Displays the supplier ID defaulted from the purchase item attributes. You can modify the value or leave the field blank.
Supplier Name	Displays the supplier name defaulted from the purchase item attributes.
Supplier Location	Displays the supplier location defaulted from the purchase item attributes. You can modify the value or leave the field blank.
Supplier Item ID	Displays the supplier item ID defaulted from the purchase item attributes.

Manufacturer Information Tab

Field or Control	Description
Manufacturer ID	Displays the manufacturer ID based on the supplier information. This field reflects any modification to the supplier details.
Manufacturer Item ID	Displays the manufacturer item ID based on the supplier information. This field reflects any modification to the supplier details.

Field or Control	Description
UPN Type	Displays the UPN type from the Manufacturer UPN table.
UPN ID	Displays the UPN ID from the Manufacturer UPN table.

Click the Save button to save the order sheet. When you save an order sheet, the system validates all the line items and their accounting lines. The validation status changes from *Initial* to *Valid*.

As part of validation, the system validates:

- Whether the item is active or not.
- The Item Vendor setup is valid or not.
- The UOM exists in the Inventory UOM table and the Item Vendor UOM table.
- The ChartField combinations.

If any issues occur, the status changes to *Error*. Click the *Error* link to view more details. The Show Validation Errors page displays the error description for each order sheet line. You must manually fix the errors on the Edit Order Sheet page or use the mass change option.

Upon saving, the *Set ID*, *Order Sheet ID*, and *GL Business Unit* fields become disabled. The administrator can change the header status to *Active* if the order sheet is ready for requisition.

Accounting Information Page

Use the Accounting Information page (PV_OS_DISTRIB_SCF) to create order sheets with one or more distribution lines.

Navigation:

Select the Add Distribution Lines icon on the Create Order Sheet page.

This example illustrates the fields and controls on the Accounting Information Page.

The screenshot shows the 'Accounting Information' page. At the top, there's a header with 'Cancel' and 'Done' buttons. Below the header, the 'Item Description' is 'CORTARA BURDUCK BASELINE HALTER PREP KIT' and the 'Quantity' is '1 Each'. Under the 'Accounting Lines' section, there's a prompt: 'Please enter GL Business Unit before selecting chartfield values'. Below this, there are tabs: 'Chartfields1', 'Chartfields2', 'Chartfields3', 'Details', 'Asset Information', and 'Show All'. The 'Chartfields1' tab is selected. Below the tabs is a table with columns: 'Distribution Line', 'Location', 'Quantity', 'Percent', 'GL Business Unit', 'Account', and 'Alternate Account'. The first row shows '1' in the 'Distribution Line' column, a search icon in the 'Location' column, '0' in the 'Quantity' column, '0.0000' in the 'Percent' column, a search icon in the 'GL Business Unit' column, a search icon in the 'Account' column, and a search icon in the 'Alternate Account' column. There are also '+' and '-' buttons at the end of the row.

All accounting lines are quantity and percentage based.

Note: If you have selected the Edit ChartField Combinations check box on the Fluid installation Settings page, you cannot save the order sheets with invalid ChartField combinations. An error message will be displayed asking you to correct invalid combinations.

Related Links

[Setting Up Installation Options for Fluid eProcurement](#)
“Understanding PeopleSoft ChartFields” (Application Fundamentals)

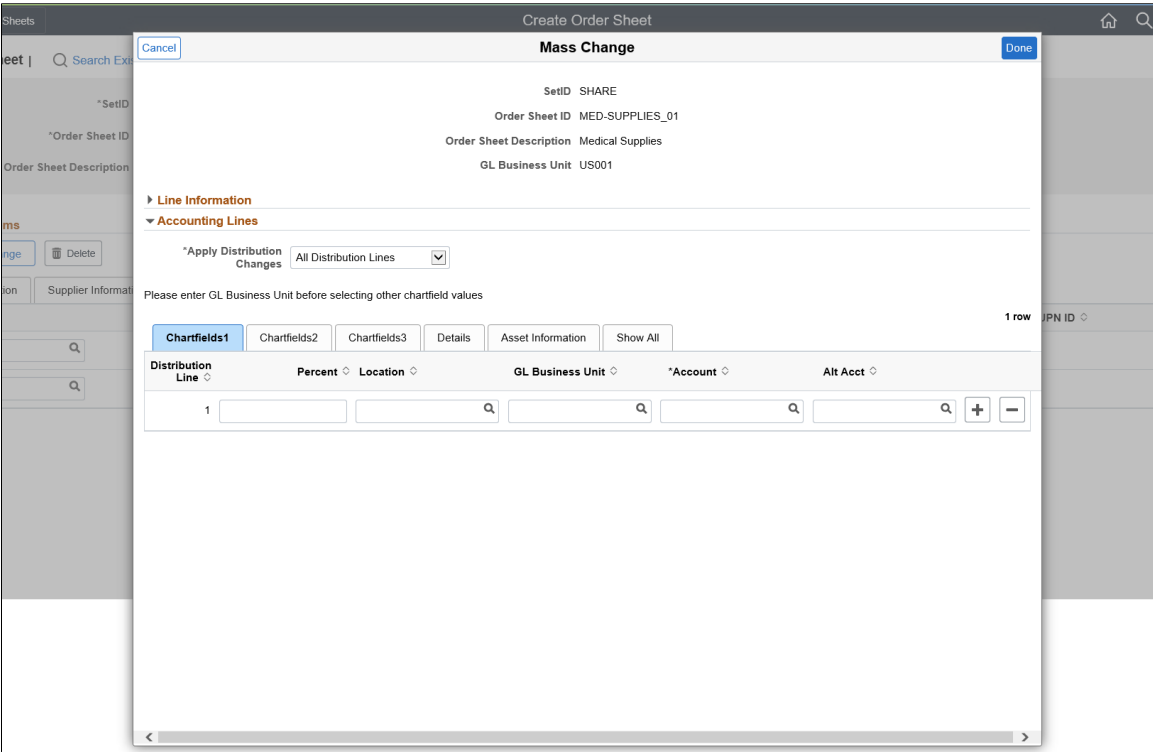
Mass Change Page

Use the Mass Change page (PV_OS_MASS_SCF) to mass update multiple order sheet item details at the same time.

Navigation:

Click the Mass Change button on the Create Order Sheet page.

This example illustrates the fields and controls on the Mass Change Page.



Make the required changes and click the *Done* button to save your changes.

For more information on mass change, see [Edit Lines/Shipping/Accounting for Selected Lines Page](#).

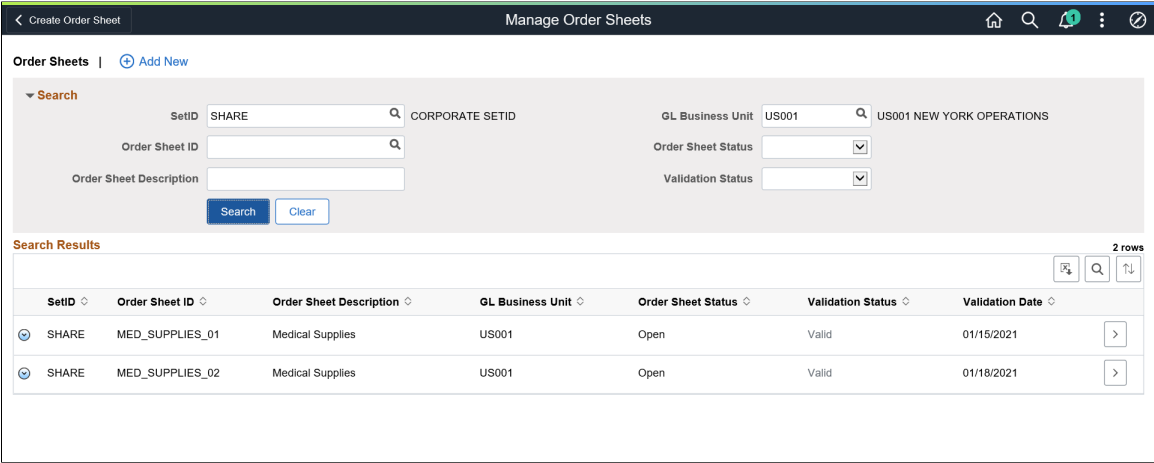
Manage Order Sheets - Search Results Page

Use the Manage Order Sheet- Search Results page (PV_OS_CREATE_FL) to search for the existing order sheets, edit the details, and perform related actions.

Navigation:

eProcurement > Administrator Procurement > Manage Order Sheets. Search for existing order sheets.

This example illustrates the fields and controls on the Manage Order Sheets - Search Results Page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
 Related Actions	Select this icon to perform the following actions: - Copy - To copy the order sheet line(s) and its accounting details for creating another order sheet. The Create Order Sheet page displays the copied lines with the validation status <i>Initial</i>. You can enter the order sheet details except the Set ID, and save the new order sheet. - Authorize - To authorize requesters to the selected order sheet. For more information on how to authorize requesters to an order sheet, see Authorize Order Sheet Page. - Validate - To validate the individual line item and its accounting lines. The same validations at the time of saving an order sheet is applicable here as well. - Delete - To delete the selected order sheet and its item lines. Click the button and confirm the action when the message displays.
 Edit	Select this icon to navigate to the Edit Order Sheet page, where you can modify the item details.

Authorize Order Sheet Page

Use the Authorize Order Sheet page (PV_OS_SECURITY_FL) to authorize requesters to the created order sheets. You can authorize multiple requesters to an order sheet. The GL business unit that a

requester can access is determined by the GL Business Unit value specified on the Requester Setup page - ChartFields grid.

Navigation:

Click the Related Actions icon on the Manage Order Sheet page and select Authorize.

This example illustrates the fields and controls on the Authorize Order Sheet Page.

The screenshot shows the 'Authorize Order Sheet' page for 'Medical Supplies' (SHAREMED_SUPPLIES_011/US001). It displays a table of assigned requesters with the following data:

Name	Requester	Department	Ship To	Location
Chris Baker	CHRISBAKER	Finance	USA - New York	USA - New York
Calvin Roth	CROTH	Eastern Sales Region	USA - New York	USA - New York

The page displays the list of assigned requesters, if any. The page header displays the Order Sheet Description, Set ID, Order Sheet ID, and GL Business Unit.

You can authorize new requesters to the order sheet and delete existing requesters.

Add Requesters Page

Use the Add Requesters page (PV_OS_SEC_ADD_SCF) to search for requesters authorized to the GL business unit and assign them to the order sheets.

Navigation:

Click the Add button on the Authorize Order Sheet page.

This example illustrates the fields and controls on the Add Requesters Page.

The screenshot shows the 'Add Requesters' modal window. The search criteria are set to GL Business Unit US001. The search results show a list of requesters with the following data:

Name	Requester	Department	Ship To	Location
Betty Locherty	BLOCHERTY	Human Resources	USA - California	USA - California
Chris Baker	CHRISBAKER	Finance	USA - New York	USA - New York
Calvin Roth	CROTH	Eastern Sales Region	USA - New York	USA - New York
Christelle Stevenson	CSTEVENSON	Human Resources	USA - California	USA - California

The search results display all the requesters associated to the GL business unit. It does not include those who are already authorized to the order sheet. The administrator can select one or more requesters. After selecting the requesters, click the Done button. On the Authorize Order Sheet page, click Save to finalize your selection.

Note: The Requester Setup page determines if a requester is associated with the particular GL business unit. To authorize a requester to order sheets for more than one GL business units, you must change the default settings on the Requester Setup page.

For more information about the Requester Setup page, see “Requester Setup Page” (PeopleSoft Source to Settle Common Information).

Order Sheets By Requester Page

Use the Order Sheets by Requester page (PV_OS_INQUIRY_FL) to search for order sheets by the authorized requesters. The search results include all the order sheets that belong to the assigned GL business unit and that are authorized to the particular requester.

Navigation:

eProcurement > Administer Order Sheets > Order Sheets by Requester

This example illustrates the fields and controls on the Order Sheets by Requester Page.

The screenshot shows the 'Order Sheets by Requester' page. At the top, there is a search bar with 'Requester' and a dropdown menu showing 'CHRISBAKER' and 'Chris Baker'. Below the search bar is a 'Search' button. The search results are displayed in a table with the following columns: SetID, Order Sheet ID, Order Sheet Description, and Status. The table shows one result for 'SHARE' with 'MED_SUPPLIES_01' as the Order Sheet ID, 'Medical Supplies' as the Order Sheet Description, and 'Open' as the Status. There is a 'Details' icon next to the result.

SetID	Order Sheet ID	Order Sheet Description	Status
SHARE	MED_SUPPLIES_01	Medical Supplies	Open

On this page, you can view the Set ID, Order Sheet ID, Order Sheet Description, and Status. To view more information about an order sheet, click its Details icon.

Order Sheet Processes Page

Use the Order Sheet Processes page (Navigation Collection) to run Mass Update and Mass Validate processes.

Navigation:

eProcurement > Administer Order Sheets > Order Sheet Processes

This example illustrates the fields and controls on the Order Sheets Processes - Mass Update Page. You can find definitions for the fields and controls later on this page.

Administer Order Sheets

Order Sheet Processes

Mass Update

Mass Validate

Run Control ID test

Report Manager

Process Monitor

Run

Search

*SetID SHARE

CORPORATE SETID

Order Sheet ID Begins With

Order Sheet Description Begins With

*GL Business Unit US001

US001 NEW YORK OPERATIONS

Order Sheet Status

Search

Clear

Select Order Sheets

1-1 of 1

View All

Order Sheet ID

Order Sheet Description

MED_SUPPLIES_01

Medical Supplies

Select All

Deselect All

Parameters

Find Item Equals

Replace Field

Replace Value

+

-

Save

Notify

Add

Update/Display

To run a new mass update process, add or select a Run Control ID. Enter the required search criteria and search for the required order sheet.

Field or Control	Description
Find Item Equals	Enter or select the required item.
Replace Field	Select the field to be replaced in the order sheet from the drop-down list. Values are: - Item ID - Ship To - Supplier ID - UOM
Replace Value	Select the new value. You can add more items to be replaced. The same Replace Field value cannot be selected more than once. Note: Be cautious when using the Mass Update option. The Replace Value must meet the requirements for the selected Replace field.

Click the Run button to run the mass update process. In the Process Scheduler Request window, click OK to continue. Check the process monitor to view the change report that shows all the order sheets and the lines that have changed.

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This example illustrates the fields and controls on the Order Sheets Processes - Mass Validate Page.

The screenshot shows the 'Order Sheet Mass Validate' page within the 'Order Sheet Processes' application. The page has a left sidebar with 'Mass Validate' selected. The main area contains search and selection controls.

Search Section:

- Run Control ID: test
- Buttons: Report Manager, Process Monitor, Run
- Search filters:
 - *SetID: SHARE (with search icon)
 - CORPORATE SETID: (empty text field)
 - Order Sheet ID: Begins With (dropdown menu)
 - Order Sheet Description: Begins With (dropdown menu)
 - *GL Business Unit: US001 (with search icon)
 - US001 NEW YORK OPERATIONS (text field)
 - Validation Status: (dropdown menu)
- Buttons: Search, Clear

Select Order Sheets Section:

- Table with columns: Order Sheet ID, Order Sheet Description, Validation Status
- Table content:

Order Sheet ID	Order Sheet Description	Validation Status
☒ MED_SUPPLIES_01	Medical Supplies	Valid
- Buttons: Select All, Deselect All
- Buttons: Save, Add, Update/Display

You must select at least one order sheet to run the Mass Validate process. Then, click the Run button to run the mass validate process. In the Process Scheduler Request window, click OK to continue. Check the process monitor to view the change report that shows all the order sheets that have been mass validated.

Creating Requisitions in PeopleSoft eProcurement

Understanding Requisitions

A requisition in PeopleSoft eProcurement is an online form for requesting items or services. After you enter and submit a requisition, you can route it for approval. Approved requisitions are then sourced to either:

- A material stock request in PeopleSoft Inventory, where warehouse personnel can fulfill the order.
- A purchase order in PeopleSoft Purchasing. The purchase order is dispatched to the supplier who fulfills the order by shipping the requested items.

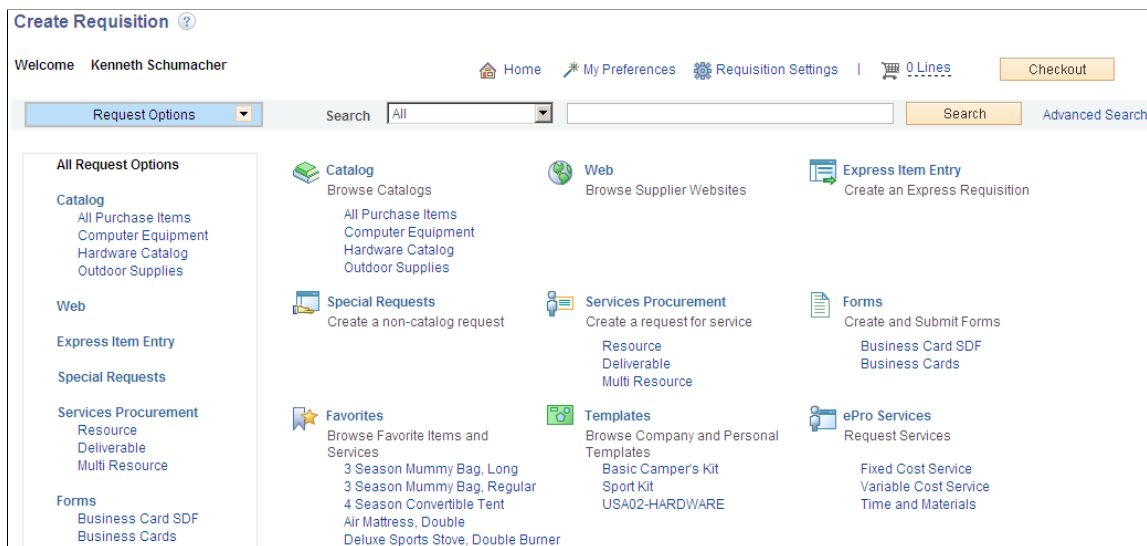
Before you enter requisitions into the system, you must be authorized to process requisitions on the User Preferences page. Also, the user ID must be identified as a requester on the Requester Setup page, where you add defaults for requisitions.

See [Procurement Page](#).

Requisition Navigation

All requisition options appear in the left navigation menu. Clicking any item will display the page in the workspace on the right. The number of subsections displayed is controlled by the setting on the [Setting Up eProcurement Requisition Navigation: Classic Page](#) page. When a search is performed and facets are invoked, the left navigation menu will automatically collapse. You can click the arrow icon next to the **Request Options** link to collapse or expand the menu.

This example illustrates the fields and controls on the Requisition.



Creating and Changing Requisitions

The same component (PV_PROCURE_REQ) is used to create a requisition in add mode and to make changes to or edit a requisition in update/display mode. If one or more requisition lines have been sourced to a purchase order, change requests may be created upon saving and submitting the requisition. See [Edit Requisition-Review and Submit Page](#)

Requisition Summary

The Requisition Summary, or shopping cart, appears at the top. The Requisition Summary displays all of the items that you have added to the requisition (item description, quantity ordered, unit of measure (UOM)), plus the number of line items on the order and the total amount expressed in the transaction currency.

Requisition Item Browse and Search

PeopleSoft eProcurement uses browse and search features to help you find items to include in requisitions. A basic search enables simple browsing and searching of requisition items. In addition, you can perform a more advanced search, as well as a parametric search of selected attributes. You can update search settings and perform exact word searches.

Item Favorites and Favorites Groups

Item favorites are items that are frequently ordered and are maintained in a single location. You can reduce the time that is needed to find an item by using item favorites. The list of favorite items that you create is private, accessible only to you, and stored by your Requester ID.

Favorites groups enable you to group your favorite items, which enables you to find the items quickly when creating a requisition. Favorites groups can be shared with other users, and a user can copy the favorite groups of another user.

See [Manage Favorites Groups Page](#).

Item Templates

You can reduce the time that is needed to enter requisitions by creating item templates, which consist of sets of items that you frequently order together. During order entry, use the templates to add these items to the requisition without searching the item catalog.

PeopleSoft eProcurement offers these templates:

<i>Term</i>	<i>Definition</i>
Personal templates	Personal templates are private and accessible only to the user who creates them.
Company templates	Company templates, also called Purchasing Kits, are used throughout the business. Only users with the correct authority can create or change company templates, but all users in the PeopleSoft Purchasing business unit have access to them. To maintain company templates for PeopleSoft eProcurement, use the Purchasing Kits feature. To access the feature, select eProcurement > Administer Procurement > Maintain Item > Purchasing Kits .

After a template has been added to a requisition, you can change the quantity of any item, delete items, or add additional items to the request. When you add a template to a requisition, the system adds only the active items in the template to the requisition. Click the **Expand Section** button to see more information about items within a template and how many of each item are to be added to the requisition.

Enter the number of sets to add to the requisition in the **Qty** field, and click the **Add** button.

Note: Item templates, which can include items from the standard item catalog, special request items, or items from PeopleSoft Services Procurement, are designed for groups of items. To save a single item, use the favorites lists.

My Preferences

In My Preferences page, which opens as a modal window when you click the **My Preferences** link, you can select the fields that will appear in the search result. Apart from this, you can delete any saved search criteria created in the Advanced Search page.

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

My Preference

Customize Search Results ?

Select the fields to be displayed in Search Results

Item ID: ☒	Supplier: ☒
Supplier Item ID: ☒	Supplier ID: ☒
Mfg Item ID: ☒	Manufacturer: ☒
Price: ☒	Manufacturer ID: ☒
UOM: ☒	Lead Time Days: ☒

*Show Search Result Item Images

Checkout Page Display

☐ Auto expand accounting lines when expanding requisition lines

Shopping Cart Display

☐ Auto display shopping cart when adding items

Delete Saved Searches

Check each saved search to be deleted and then hit OK button to complete removal.

Note There are currently no saved searches.

Term	Definition
Auto expand accounting lines when expanding requisition lines	Select check box to expand the Accounting Lines grid automatically when Requisition Lines section is expanded.
Auto display shopping cart when adding items	Select check box to automatically display the floating cart when adding requisition items to the cart.

Related Links

[Understanding Supplier Data](#)

[Maintaining System Users and Roles](#)

Common Elements Used in Creating Requisitions

Field or Control	Description
AM Unit (asset management unit)	Select a PeopleSoft Asset Management business unit to capitalize all items on this requisition in PeopleSoft Asset Management. This entry overrides values that otherwise appear by default from the item definitions.
Account	Change this value only to change the standard accounting structure.
Accounting	Click to access general ledger information and define accounting rules for items that you are adding to a requisition.
Amount	Displays the total item price in the transaction currency from the requisition.
Apply	Click to apply the changes that you've made, for example, changes to shipping or accounting information.
Asset Profile ID or Profile ID	Select an ID to capitalize all items on this requisition in PeopleSoft Asset Management. This entry overrides values that otherwise appear by default from the item definitions.
Capitalize	Select to indicate that the items on this requisition should be capitalized in PeopleSoft Asset Management. This check box is available only if a PeopleSoft Asset Management business unit is selected.
Catalog	Displays the name of the PeopleSoft catalog in which this item is located. Define item catalogs with PeopleSoft Tree Manager.
Category	Displays the item category from the Item Definition - General page.
Consolidate with other Reqs (consolidate with other requisitions)	Select to consolidate multiple requisitions for the same supplier into one purchase order.
Delete	Click to remove a selected item from a requisition.
Department	Displays any default value from the requester definition.
Due Date	The date that the shipment is scheduled to arrive at the destination (ship to location).

Field or Control	Description
 (Embedded Help)	Click the Embedded Help icon to open up a secondary window with information about this page or section. Embedded help can provide information about specific fields and point the user to additional help. See <i>PeopleTools: Applications User's Guide</i> for more information on creating and modifying embedded help.
GL Unit (general ledger unit)	Displays the PeopleSoft General Ledger business unit that is defined on the Purchasing Definition - Business Unit Definition page.
IN Unit	The Inventory business unit where the items should be put away when they are received.
Location Code	Displays the internal location for the delivery of this requisition, for example, office number, lab name, and so on. The value comes from the requester setup definition.
Manufacturer	Indicates the manufacturer of the item, which is assigned on the Manufacturer's Item page.
Manufacturer's Item ID	Displays the item ID that the manufacturer uses, which is assigned on the Manufacturer's Item page.
Mfg ID (manufacturer's ID)	Identifies the manufacturer of the item. This value is supplied from the Supplier's Manufacturer Info page.
Mfg Itm ID (manufacturer item ID)	Displays the identifier that the manufacturer uses for this item when the suggested supplier supplies the item. This value appears from the Supplier's Manufacturer Info page.
Modify Shipping Address	Click to access the Shipping Address page, where you can change the shipping address.
Percent	Enter a percentage of the quantity or the amount to distribute. The system updates either the Amount or Quantity field value, depending on the selection in the Distribute by field.
Price	Displays the supplier's unit price and currency for the item, which are assigned on the Supplier's UOM & Pricing Info (supplier's UOM and pricing information) page.
Product	Identifies a product.
Project ID	You can enter any information that is relevant to the project.

Field or Control	Description
Quantity	Enter the quantity of items that you want distributed on this distribution line. This field appears only if you select <i>Qty</i> as a distribution method in the Distribute by field. The system updates the value in the Percent field based on the entry.
Requester	The user ID of the person for whom the requisition is created.
Select All/Deselect All	Select to select all items or to deselect all selections in a list. The check box appears beneath the list to which it pertains.
Ship To	Displays the organization ship location that the supplier should use for delivery for this requisition. This field is populated from the requester definition.
Standard Price	Displays the standard price from the Purchasing Attributes page for the item.
Status	Displays the status of a requisition. Values are <i>Open</i> , <i>Pending</i> , <i>Approved</i> , and <i>Complete</i> .
Unit of Measure (UOM)	Displays the UOM from the Supplier's UOM & Pricing Info page for the item. The Units of Measure page (Items > Define Items and Attributes > Define Item UOM) has a field labeled Default Req UOM. The UOM that appears to the requester is the one that is marked as the Requisition UOM. If this option is not selected, then the item supplier UOM or standard UOM appears. See “Using Item Quantity UOM” (PeopleSoft Managing Items). Note: If the requester is assigned to the eProcurement role action of VIEW_ORDERING_UOM, and the item is set up with a default requisition UOM, the default requisition UOM will appear on the requisition. Default Req UOM field is used only for search. See Maintaining System Users and Roles.
UPN ID (universal product number ID)	Enter the UPN ID that is assigned to a unique combination of item ID, manufacturer ID, and UOM. The UPN appears on the Item Description page when it is associated to an item manufacturer.
Supplier	Displays the suppliers that supply this item. This information appears by default from the Item Supplier page.
Supplier Item ID	Displays the ID that the supplier uses to identify this item on the Item Supplier page.

Field or Control	Description
Supplier Loc (supplier location)	Displays the location of the supplier. The default is based on the value that is defined for the supplier.
Supplier Look Up (icon)	Click to access the Supplier Search page, where you can enter information to find a supplier.

Related Links

“Defining Purchasing Item Attributes” (PeopleSoft Purchasing)

“Purchasing Options Page” (PeopleSoft Purchasing)

Creating Requisitions

This section provides an overview of requisition creation and discusses how to define requisitions, find requisition items, select catalog items, select favorite items to include in requisitions, use template items to create requisitions, select forms to include in requisitions, select direct connect suppliers or the Oracle Business Network for requisitions, and add special requests to requisitions.

Understanding Requisition Creation

PeopleSoft eProcurement enables users to create requisitions in an efficient manner. The key to entering requisitions quickly is defining a proper default structure that prevents you from changing information on the requisition. For a requisition with no changes to the default structure, you can enter the items, review the request, and submit it. For more complex requisitions, PeopleSoft eProcurement provides a number of links to additional information.

Pages Used to Create Requisitions

Page Name	Definition Name	Usage
<u>Requisition Settings Page</u>	PV_REQ_SETTINGS	Define requisition settings, including the purchasing business unit and the requester for the requisition. You can also define default values for requisition lines.
<u>Create Requisition Page</u>	PV_AcLL_RQST_OPTION	Find requisition items.
<u>Create Requisition - Catalog Page</u>	PV_REQ_CATBROWSE	View catalog item details.
<u>Create Requisition — Favorites Page</u>	PV_REQ_NEWFAVS	Select favorite items and item groups to include in requisitions. Add items to your favorites list and group favorite items into favorite groups.

Page Name	Definition Name	Usage
<u>Create Requisition — Templates Page</u>	PV_REQ_NEWTEMPL	Use template items to create requisitions. Create new templates and add items to existing templates.
<u>Create Requisition - eProcurement Services Page</u>	PV_REQ_SERVICES	Include eProcurement services.
<u>Create Requisition - Services Procurement Page</u>	SP_REQ_BROWSE	Include services from Services Procurement . “Managing Service Requisitions” (PeopleSoft Services Procurement)
<u>Create Requisition — Forms Page</u>	PV_EXP_FORMS	Select forms to include in requisitions.
<u>Create Requisition — Web Page</u>	PV_REQ_MERCHANTS	Interact directly with a supplier's website.
<u>Create Requisition — Special Requests Page</u>	PV_REQ_SPECIAL_REQ	Add special requests to requisitions.
<u>Create Requisition - Express Item Entry Page</u>	PV_EXPRESS_REQ	Enter details for express items and add them to the cart.
<u>Create Requisition - Recently Ordered Page</u>	PV_REQ_RECENT_ORD	View recently approved items.
<u>Create Requisition - External Catalogs Page</u>	PV_REQ_TPOMERCH	View a list of all available suppliers.

Requisition Settings Page

Use the Requisition Settings page (PV_REQ_SETTINGS) to define requisitions, including the purchasing business unit and the requester for the requisition. You can also define default values for requisition lines. However you cannot use it to modify requisition lines and requisition schedule lines that are already sourced to PO and other systems.

Navigation:

eProcurement > Create Requisition > Requisition Settings

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

Requisition Settings

Business Unit: US001 NEW YORK OPERATIONS Requisition Name:

Requester: Kenneth Schumacher Requisition ID:

*Currency: Priority:

Card Number: Expiration Date:

☐ Use Procurement Card

Default Options ?

☐ Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

☒ Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults ?

Supplier: Category:

Supplier Location: Unit of Measure:

Buyer:

Shipping Defaults

Ship To:

Due Date: Attention:

Distribution Defaults

Accounting Tag:

Accounting Defaults

Personalize | Find | | First | Last

Chartfields1	Chartfields2	Chartfields3	Details	Asset Information		
Dist	Percent	Location	GL Unit	Account	Alt Acct	
1	100.0000	US001	US005	500000		

This page enables you to define information for a new requisition.

Before using this page, determine the features that your users can access by linking user roles to the following eProcurement role actions:

- The CHANGEREQBU role action is required to access the **Business Unit** and **Requester** fields on this page. For users without this role action, these fields cannot be changed. The values in these fields are provided by default from the User Preferences component.
- The ALLOW_DEFAULT_OPTIONS role action enables users to select between the default options of **Default** or **Override** within the **Line Defaults** group box of this page. Without this role action, users can only enter default values, not override values.

See [Maintaining System Users and Roles](#).

Field or Control	Description
Requester	Enter the name of the person requesting these materials or services. This value can be your name or you can purchase on behalf of another person. For you to purchase on behalf of another user, these requesters must be defined on the User Preferences page.
Requisition Name	Enter a description of the request to help you identify this requisition as it flows through the system. If this field is left blank, the system uses the requisition ID as the name.

<i>Field or Control</i>	<i>Description</i>
Currency	Displays the currency that is selected for the business unit. This value can be overridden if the business unit allows for multicurrency processing.
Priority	Enter a priority for reporting or query purposes.
Card Number	Select a card number for procurement card.
Use Procurement Card	Select check box to use the procurement card.

Defining Requisition Line Default Values

The fields that you enter on this page can be applied to the entire requisition at the line, shipment, or distribution levels.

Field or Control	Description
Default Options	Determines how your entries in the Line Defaults group box are applied. The options are: Default: The values that you enter in the Line Defaults group box are applied to the entire requisition (i.e. at the line, shipment schedule, or distribution line levels) only if there is no default value from the item default hierarchy in PeopleSoft eProcurement and Purchasing. When a value comes from the default hierarchy, it appears in this group box and any change to this value is ignored. When no predefined values exist, the data that you enter in the line defaults section replaces blank fields as defaults. The <i>Default</i> option is the only available choice if your user ID is not linked to the ALLOW_DEFAULT_OPTIONS eProcurement role action. If you have selected the default option and need to override values at the line level, use the Modify Line/ Shipping/Accounting page within this component. See “Purchasing Item Default Hierarchy” (PeopleSoft Purchasing). Override: The values that you enter in the Line Defaults group box are applied to the entire requisition (that is, at the line, shipment schedule, or distribution line levels). When a value comes from the item default hierarchy, it appears in this group box and any change to this value will override the default value for this requisition. However, blank values are not considered an override value; for example, if you blank out a value that comes from the item default hierarchy, then the system still uses the default value on the requisition. The <i>Override</i> option is only available if your user ID is linked to the ALLOW_DEFAULT_OPTIONS eProcurement role action.
Supplier	Select the supplier for the items on this requisition. Select Supplier Location. However, be cautious when changing the supplier location. Purchase orders are not sent to marketplace unless the supplier ID and supplier location match those values that are defined on the Linked Supplier Setup page. To access the page, select eProcurement > Administer Procurement > Maintain Supplier Integration > Linked Suppliers.
Supplier Location	Select a suitable value for the Supplier Location.

Field or Control	Description
Buyer	Select a buyer for this requisition. At the requisition line level, the system uses the buyer from the item definition or item supplier.
Category	Define a default category for this requisition.
Unit of Measure	Define the UOM for use on this requisition.

Shipping Defaults

Field or Control	Description
Ship To	Select the standard address to which most of the requisition is delivered.
Add Onetime Address	Click to access the Shipping Address page, where you can override a shipping address that is not in the standard ship to location codes. This link is controlled by NO_ONETIME_SHIPTO role action. It will not appear if this role action is enabled for a user.
Due Date	The standard date on which the customer wants to receive the items on this requisition.
Attention	Enter the name of the individual who should receive the items or services. Once the shipment is received, this individual should record the receipt, enabling the buyers to track the quality and promptness of the supplier.
Ship Via	Select suitable Ship Via Code value by clicking the prompt button. Note: This field is visible only if SHIPVIA_FREIGHT_DISPLAY role action is enabled.
Freight Terms	Select suitable Freight Terms Code value by clicking the prompt button. Note: This field is visible only if SHIPVIA_FREIGHT_DISPLAY role action is enabled.

Distribution Defaults

<i>Field or Control</i>	<i>Description</i>
SpeedChart	Select a SpeedChart Key by clicking the prompt. Based on the SpeedChart key selected, the system automatically distributes the accounting line amounts according to the proration percentage defined for the selected SpeedChart. You can modify the distribution values. Note: This field is visible only if role action ACCOUNTING_DISPLAY is assigned to action <i>Editable</i> and it will be hidden if role action ACCOUNTING_DISPLAY is assigned to action <i>Hide</i> or <i>Display Only</i> . SpeedChart will be invisible if Accounting Tag is enabled. Note: This field will be disabled if Default Options is set to <i>Default</i> and it will be enabled if Default Options is set to <i>Override</i>.
Accounting Tag	Click the prompt to select appropriate Accounting Tag that will be used to populate ChartFields on transaction distribution lines. The system automatically prorates the amount of an accounting line according to the proration percentages defined on the Accounting Tag. Note: This field appears only if Accounting Tag check box is selected for eProcurement on the Accounting Tag Registration page. See “Setting Up Accounting Tags” (Application Fundamentals) Note: This field is visible only if role action ACCOUNTING_DISPLAY is assigned to the action <i>Editable</i>. It will be hidden if role action ACCOUNTING_DISPLAY is assigned to the action <i>Hide</i> or <i>Display Only</i> action. This field will be disabled if Default Options is set to <i>Default</i> and it will be enabled if Default Options is set to <i>Override</i>.

Accounting Defaults

<i>Field or Control</i>	<i>Description</i>
Dist	This column displays the distribution line number.

Field or Control	Description
Chartfields	Enter ChartField and asset management information. Note: The ChartField values on this page are described further in this documentation.

Related Links

“Understanding PeopleSoft ChartFields” (Application Fundamentals)

“Understanding Basic Commitment Control Setup” (PeopleSoft Commitment Control)

“Understanding the Supplier Import Processes” (PeopleSoft Source to Settle Common Information)

Maintaining System Users and Roles

“Using Accounting Tags in PeopleSoft Classic” (Application Fundamentals)

Create Requisition Page

Use the Create Requisition page (PV_REQ_CATBROWSE) to find requisition items.

Navigation:

eProcurement > Create Requisition

This example illustrates the fields and controls on the Create Requisition page.

Create Requisition ?

Welcome Kenneth Schumacher

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search Catalog Search Advanced Search

All Request Options

- Catalog**
 - Browse Catalogs
 - All Purchase Items
 - Computer Equipment
 - Hardware Catalog
 - Outdoor Supplies
- Web**
 - Browse Supplier Websites
- Express Item Entry**
 - Create an Express Requisition
- Special Requests**
 - Create a non-catalog request
- Services Procurement**
 - Create a request for service
 - Resource
 - Deliverable
 - Multi Resource
- Forms**
 - Create and Submit Forms
 - Business Card SDF
 - Business Cards
- Favorites**
 - Browse Favorite Items and Services
 - 3 Season Mummy Bag, Long
 - 3 Season Mummy Bag, Regular
 - 4 Season Convertible Tent
- Templates**
 - Browse Company and Personal Templates
 - Basic Camper's Kit
 - Sport Kit
 - USA02-HARDWARE
- ePro Services**
 - Request Services
 - Fixed Cost Service
 - Variable Cost Service
 - Time and Materials
- Recently Ordered**
 - View recently ordered items and services
 - SR002
 - SR001
 - Memory Circuit Board, 128 MB
 - Desktop - Standard 160Mb Ram
 - More...
- External Catalogs**
 - Browse Supplier Website Items

Use this page to find items for a new or existing requisition. Based on the type of search selected in the eProcurement Installation Options page, the requisition items will be searched. Default search type will be SQL search. A SQL search is performed against Item Description.

This example illustrates the fields and controls on the Search Settings.

Based on the fields selected on this page the search result is displayed. You can choose the required sort option for the search result from the available five options, Description, Manufacturer Name, Price, Relevance Ranking, and Supplier Name. By default Description option will be selected. If you select Relevance Ranking as the default sort option and marketplace integration is disabled later, then the default sort option will revert back to Description.

Relevance Ranking sort option will return the search results based on the marketplace ranking of the items. This option is available only if the Consolidate Item Search Results and Facets Option check box is selected on the eProcurement Installation Options page. This option is not applicable for sPro items.

Item Search

You can search for items to include in a requisition by:

- **Basic Search:** Enter either a keyword or a phrase and click the **Search** button. You can choose to search against all the categories or select any specific category/option from the **Search** drop—down list. If Search framework search is enabled, then indexed fields to search against can be configured on the Search Settings page in eProcurement Installation Options.

Any changes made to items such as price or any of the purchasing attributes requires the catalog information to be exported. This includes changes made to the suppliers as well. This is achieved by performing the Search framework index update. Once catalog export is done the marketplace makes necessary updates to the catalog information including the facets.

Note: None of the basic search criteria is carried over to advanced search.

For more information on Search framework search settings, see [Setting Up Installation Options](#).

- **Browsing Catalogs:** You can browse catalogs either from the left navigation or the All Request Options page. Clicking a catalog or category will initiate a search and return all items in that particular catalog or category.
- **Advanced Search:** You can click the **Advanced Search** link, which opens the advanced search criteria page in a modal window. Enter the search criteria for required search fields. You can save the search criteria by clicking the **Save search Criteria** link. Basic search criteria is independent of advanced search criteria.

You can narrow your search to contract by making use of Search By Contract ID. Contract search is independent of advanced search.

This example illustrates the fields and controls on the Advanced Search page.

Advanced Search

Search Name  [Save Search Criteria](#)

Advanced Item Search [Search Tips](#)

*Search Contains of the following search fields entered.

Description

Manufacturer

Manufacturer ID

Supplier

Supplier ID

Item ID

Model

UPN ID

Category ID

Supplier Item ID

Manufacturer Item ID

Category

Price Range: From To In

Search By Contract ID

Contract 

Based on the category attribute defined, Search By Attribute will appear in the Advanced Search page. If no category attributes are defined, it will be hidden.

Click the **Search Tips** link to view a window that explains how to format searches in the **Keywords** field.

For the **Price Range** field, you can specify the price in any currency because it will be converted to the common currency specified in the search settings in the eProcurement Installation Options page.

Options for the **Search Contains** field perform in the following manner:

- **All** — If selected, will combine all the search criteria specified in the Advanced Item Search page to perform the search AND operator will be used during the search.
- **Any** — If selected, will perform the search for any of the search criteria specified in the Advanced Item Search page OR operator will be used during the search.

This is common for both Search framework and SQL searches.

For the SQL search, the search operators that appear in the drop-down list for the search fields are *Begins With*, *Contains*, and *Equals*. As an example, consider the search result displayed for the following search field—search operator—search data:

- Description – Begins with – Long Sleeve
- Manufacturer ID – Equals - BICY-10000
- Manufacturer – Contains - Bicycle

Note: Due to the highly complex nature of universal product identifiers and the fact that they are unique to a particular item, the UPN ID can only be searched using the *Equals* operator. This means that the entire identifier must be entered in order to search.

This example illustrates the fields and controls for Search result - SQL search.

The screenshot displays the 'Catalog Search Results' page in PeopleSoft eProcurement. It shows three search results for the item 'Long Sleeve Biking Jersey, Men'. Each result includes a 'Contract' or 'Inventory (Available)' status, a 'Quantity' field, and an 'Add' button. The results are as follows:

Item ID	Supplier	Supplier ID	Manufacturer	Manufacturer ID	UPN Type	UPN ID
10000	BERNIE'S BIKE SHOP	SCM0000004	East Coast Bicycle	ECBICYCLE		
10000	Tanden Computers	CAN0000001	West Coast Bicycle	WCBICYCLE		
10000	Tanden Computers	CAN0000001	Bicycle Small Component	BICYCLES MC	GTIN	74114774114744

For the Search framework search, the available search operators are *Begins With*, *Contains All*, *Contains Any*, and *Equal*. Here you have the option to search based on All or Any of the search criteria specified in the search fields.

For example, consider the search result when search operator for the **Description** field is selected as *Contains Any* and search criteria is given as “Desktop, monitor”:

This example illustrates the fields and controls for Search result - Search framework search - Contains Any.

Search
Catalog - Only the first 50 results are displayed. Please refine the search parameters.

☐ Select All/Deselect All Add Selected To: Cart Compare Favorites Templates

*Sort By: Description

Catalog Search Results Find First 1-50 of 50 Last

☐ 1337 Desktop PC Motherboard

Contract ★ Preferred

Item ID	A005	Supplier	Stiles Office Supply
Supplier Item ID		Supplier ID	USA0000051
Lead Time		Manufacturer	Computer Manufacturer
Mfg Item ID	A005_MFG	Manufacturer ID	COMPUTER
Price	258.0000	UPN Type	COMPUTER
UOM	Each	UPN ID	

Quantity Add Add to Favorites Add to Template(s)

☐ 1337 Desktop PC Motherboard

Contract

Item ID	A005	Supplier	Star Rental Group
Supplier Item ID		Supplier ID	USA0000004
Lead Time		Manufacturer	Computer Manufacturer
Mfg Item ID	A005_MFG	Manufacturer ID	COMPUTER
Price	258.0000	UPN Type	
UOM	Each	UPN ID	

Quantity Add Add to Favorites Add to Template(s)

☐ 17 inch LCD Display Computer Monitor; Analog/Digital

Contract ★ Preferred

Item ID	DSS_MONITOR_17	Supplier	Midton Computer Supplies
Supplier Item ID	MCS-17INCH-LCD	Supplier ID	USA0000010
Lead Time		Manufacturer	
Mfg Item ID		Manufacturer ID	
Price	235.0000	UPN Type	
UOM	Each	UPN ID	

Quantity Add Add to Favorites Add to Template(s)

Next consider the search result when the search operator for the **Description** field is selected as *Contains All* and search criteria is given as “Desktop, monitor”:

This example illustrates the fields and controls for Search result - Search framework search - Contains All.

The screenshot shows the 'Search "Desktop Monitor"' results page. It displays three search results for '25 inch Desktop LCD Monitor, Widescreen' and '32 inch Desktop LCD Monitor, Widescreen'. Each result includes a checkbox, a 'Substitute Item' icon, and a 'Contract' icon. The results are sorted by 'Description' and show 1-7 of 7 results. The first result is for '25 inch Desktop LCD Monitor, Widescreen' with Item ID A002, Supplier Eastern Bay Office Supplies, and Price 125.0000 USD. The second result is for '25 inch Desktop LCD Monitor, Widescreen' with Item ID A002, Supplier Midton Computer Supplies, and Price 125.0000 USD. The third result is for '32 inch Desktop LCD Monitor, Widescreen' with Item ID A001, Supplier Midton Computer Supplies, and Price 175.0000 USD. Each result has a 'Quantity' field, an 'Add' button, and links for 'Add to Favorites' and 'Add to Template(s)'. The 'Add' button is highlighted in orange.

Next consider the search result for the following search field—search operator—search data:

- Manufacturer – Contains Any – Bicycle
- Supplier – Equal – BIKE SHOP

Note: Advanced search will not return transparent punchout items.

Note: **Modal** and **Price Range** fields are not available for a SQL search.

Search Results

The search results will appear after you enter search criteria and search using basic search, advanced search, or by browsing catalogs. It will appear in the workspace area. You can select only multiple items to add to the cart when the user has the ADD_MULTI_ITEMS role action enabled.

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

Create Requisition ?

Welcome Kenneth Schumacher

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search All Long Sleeve Search Advanced Search

Filter by

Item Category
Cycling Equipment (22)

Manufacturer Name
SUN (10)
No Value (6)
Bicycle Small Component (4)
East Coast Bicycle (1)
West Coast Bicycle (1)

Supplier Name
Bike Shopper (4)
Emel's Diner (4)
BERNIE'S BIKE SHOP (3)
Computers Unlimited Pty L. (3)
Deltz (3)
More...

Preferred Supplier
No (18)
Yes (4)

Search "Long Sleeve"
Catalog - 22 results returned.
☐ Select All/Deselect All Add Selected To: Cart Compare Favorites Templates

Catalog Search Results ?

*Sort By Description

Find First 1-22 of 22 Last

☐ Long Sleeve Biking Jersey, Men's
No Image Inventory (Not Available)

Item ID COPY10000
Supplier Item ID 10
Mfg Item ID
Price 20.0000 USD
UOM Each
Quantity Add Add to Favorites Add to Template(s)

☐ Long Sleeve Biking Jersey, Men's
No Image Contract Inventory (Available)

Item ID 10000
Supplier Item ID
Lead Time 10
Mfg Item ID BICY-10000
Price 20.0000 USD
UOM Each
Quantity Add Add to Favorites Add to Template(s)

Supplier Bike Shopper
Supplier ID SCM0000001
Manufacturer Bicycle Small Component
Manufacturer BICYCLESIMC
UPN Type GTIN
UPN ID 74114774114744

This example illustrates the fields and controls on the Price Adjustment List page.

Price Adjustment List

Item ID 10000 Long Sleeve Biking Jersey, Men's

Supplier ERNIE'S BIKE SHOP

Loc MAIN

Price 22.0000 USD

Value Adjustments Personalize | Find | First 1 of 1 Last

Min Qty	Max Qty	UOM	Ship To	Adjustment Method	Adjustment Amount	Adjust Percentage	Currency
1.0000	3.0000	EA	US001	Percentage		-3.0000	USD

Return

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

Item Description

No Image

3 Season Mummy Bag, Long

Item ID 10037
Category Camping Equipment
*Unit of Measure Each
Standard Price 120.0000

Catalog ID ALL_PURCHASE_ITEMS
Conversion Rate 1
Quantity Add

Supplier Information

Deltz

Location	Manufacturer ID	Mfg Item ID	Supplier Item ID	Price	UOM	Conv. Rate	UPN Type	UPN ID	Quantity
MAIN	BUSSM AN	131313		120.0000	USD EA	1.00	GTIN	23112311	Add

Other Suppliers

Inventory Availability

Ship To Location
US001

Inventory BU	Quantity Available	UOM
US010	2400	EA
US011	0	EA
Total Quantity Available to this location: 2400		EA

If Search framework search is selected as the preferred search type, then facets will be used to narrow the search results more precisely. When facets are used, locator links will appear. You can remove any unwanted facets by closing the appropriate locator link or you can return to the original search result.

If the search returns results from multiple sources, then the search result will appear in separate tabs for each source. In the search result, item images will appear if you selected that option in the My Preferences page or Customize Search Results page in eProcurement Installation Options.

This example illustrates the fields and controls on the Multi Image — Item Description. You can find definitions for the fields and controls later on this page.

Item Description



2/13

Sun Server

Item ID AM1003
Category Machinery and Equipment
*Unit of Measure Each
Standard Price 20000.0000

Catalog ID
Conversion Rate 1
Quantity Add



Supplier Information

Location	Manufacturer ID	Mfg Item ID	Supplier Item ID	Price	UOM Conv. Rate	GTIN	Quantity
				0.0000			Add

Other Suppliers

Inventory Availability

Ship To Location

US001

There are no items available to this shipping location from inventory.

Note: On the eProcurement Installation Options page if the Multi Image check box is selected then multiple images for each item can be added and will be available for viewing on the Item Description page.

Field or Control	Description
Compare	To compare items, select the check boxes to the left of the item descriptions and click this link. You can compare the item results with other items from the selected category that share the same attributes. The comparison result will appear in a pop-up window. This link is role action controlled. Note: You can compare up to five items at a time. You can compare items in Catalog, Favorites, and External sections.
Sort By	Select to sort the search results by <i>Description</i>, <i>Manufacturer Name</i>, <i>Price</i>, or <i>Supplier Name</i>. Note: Sort By option is applicable only for Search framework search and not for SQL search.

Field or Control	Description
UOM	Displays unit of measure for the requisition. UOM prompt will display only item/supplier/location UOMs if VIEW_SUPPLIER_UOM role action is enabled and VIEW_ORDERING_UOM role action is disabled.
Add	Click to add items to the requisition along with the item quantities that you defined. The items with a defined quantity are added to the requisition. Once the item is added to the cart, the number of items in the cart appear as lines at the top. Also, a message <i>Added to cart</i> will appear next to the item.
Quantity	Enter the number of items to be added to the cart.
	Appears next to any row with a preferred supplier in the Supplier Name column. It is role action controlled.
Add to Favorites	Click to add selected items to the Favorite list. A message appears confirming that the item was added to the Favorites list.
Add to Template(s)	Click to add selected items to one or more templates. On clicking this link, the Add items to Templates modal window opens, where you can select the required template to add the item. You can also add a new template.
Item Description	Click the item name in the search result to access the Item Description page, where you can view details about the item. The information that appears on this page is dependent on the RESTRICT_INV role action. Items can also be added to the cart from the Item Description page. You can add items without a supplier from the Item Description page and add items for a specific supplier from the Create Requisition page. Supplier Attributes icons such as Green Supplier, Woman Owned Business, and Small Business appear as part of the supplier information. However this field is displayed only if the Consolidate Item Search Results and Facets Option check box is selected on the eProcurement Installation Options page.
Inventory (Available)	Click to view the inventory details for the particular item. This link is role controlled. When you hover over the link, the value for total quantity with standard UOM is shown.

Field or Control	Description
Inventory (Not Available)	This link indicates that the item is inventory but has no quantity available. This link is role controlled. When you hover over the link, the value for total quantity is shown as zero.
Contract	Click to view the contracts available for the particular item. You can click any Contract ID to view the Contract Entry page. This link is role controlled.
Price Breaks	Click to view the price breaks for the particular item. All the fields on the Price Break List page are display only. This link is role controlled.
Price Adjustments	Click to view a list of the value adjustments available for the particular item. This list opens in a pop-up window. This page is display only. This link is role controlled.
Substitution Item	Click to view all the item substitutes available for the item. This link is role controlled.
Marketplace Price and Availability	Click this button to navigate to the supplier marketplace and retrieve the item price and availability information for the particular marketplace item. Note: This button is available only for marketplace items.
Item Attributes	View all the attributes defined for a particular item.

See the product documentation for

PeopleTools: Search Technology

“Understanding Financials and Supply Chain Search” (Application Fundamentals)

Click to watch a short video about [PeopleSoft eProcurement User Interface and Application Search](#).

Click to watch a short video about [PeopleSoft eProcurement 9.2](#).

Related Links

[Maintaining System Users and Roles](#)

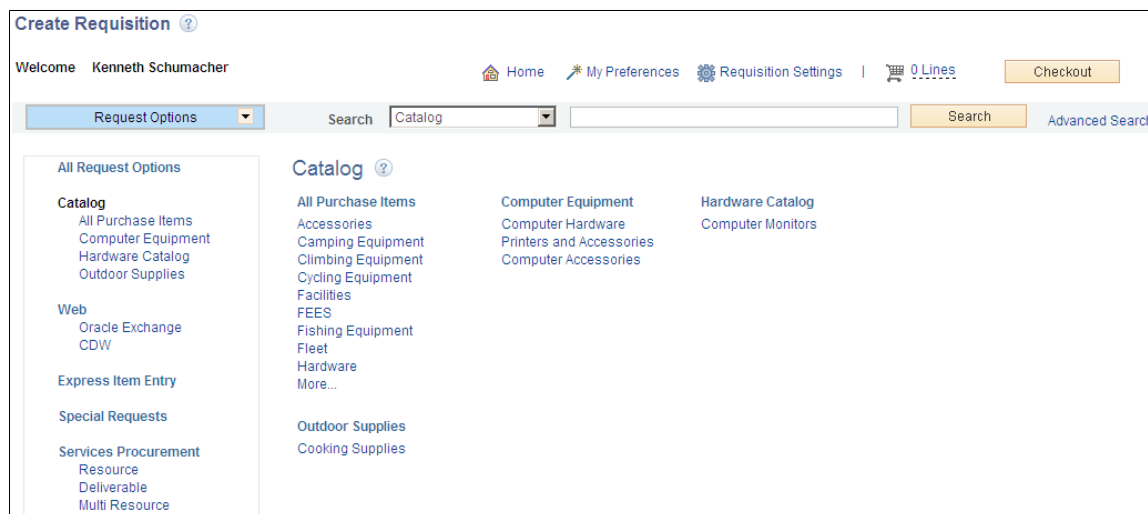
Create Requisition - Catalog Page

Use the Create Requisition — Catalog page (PV_REQ_CATBROWSE) to select and view catalog items.

Navigation:

eProcurement > Create Requisition > Catalog

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



You can view the items available in different sections, such as Web and Forms, in the left navigation menu. The number of items shown is configurable at the installation level but a default of five items will be displayed. You can browse through all the menu item categories and the respective items in the workspace. Items displayed in the workspace are determined by catalog/user security settings. Click any category, such as Accessories, to view all the items that fall under that particular category. Facets are invoked when you browse the catalog items.

You can select the **Substitute Items** icon to display related substitute items.

Create Requisition — Favorites Page

Use the Create Requisition — Favorites page (PV_REQ_NEWFAVS) to select favorite items and item groups to include in requisitions.

Add items to your Favorites list and group favorite items into Favorite groups.

Navigation:

eProcurement > Create Requisition. Click the Favorites link

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

Create Requisition ?

Welcome Kenneth Schumacher

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search Favorites Long Sleeve Search Advanced Search

Filter by

Vendor
No Value (1)
BERNIE'S BIKE SHOP (1)

Manufacturer
No Value (1)
SUN (1)

Search "Long Sleeve"
Favorites - 2 results returned.
Compare Selected

*Sort By Description

Favorites Search Results ? Find First 1-2 of 2 Last

☐ No Image	Long Sleeve Biking Jersey, Men's	Inventory (Not Available)	Item ID COPY10000	Supplier	Supplier ID	Manufacturer	Manufacturer ID	UPN Type	UPN ID
	Price 20.00	USD							
	UOM Each								
Quantity									
☐ No Image	Long Sleeve T-Shirt, Mens	Contract Inventory (Available)	Item ID 10002	Supplier	Supplier ID	Manufacturer	Manufacturer ID	UPN Type	UPN ID
	Price 14.00	USD							
	UOM Each								
Quantity									

This page displays the most current favorite items and favorite groups defined.

The Favorites page has two functions:

- You can add items to the requisition.
- You can organize favorite items into favorite groups.

The **Substitute Item** link in the Favorites page when clicked will display all the substitute items related to the particular favorite item.

Favorites are frequently ordered items and groups of items that you can maintain in a single location. You can create a list of items that are frequently ordered, and you can organize them by creating favorites groups. You can use the list to add items to a requisition without searching the item catalog.

Ungrouped items are private, accessible only to you, and are stored under the Requester ID. The list can be built from items in PeopleSoft eProcurement or PeopleSoft Services Procurement.

Favorites groups can be shared with other roles and users, and they are stored by Requester ID. You create favorites groups by clicking the **Manage Favorites Groups** link. On clicking this link, the Manage Favorites Groups page opens in a modal window, where you can view or edit all available favorites groups or create a new group. You can also copy another requester's favorite group into your group.

To add a favorite item or groups of items to a requisition, select the check box to the left of the item or item group and click the **Add** button. You can update quantities when you access the Review and Submit page.

Status and Type Columns

Information about the Favorites includes the current item status and the type of item.

Field or Control	Description
 (Status)	Displays one of these statuses when you hover over the icon: <i>Inactive</i>: the item is active at the business unit level, the SetID level, or both levels. <i>Unavailable</i>: the user does not have access to the item. <i>Supplier Item Inactive</i>: the item is inactive for the supplier. If the item status is <i>Active</i>, the Status icon will not appear.

The Type column displays to the left of the Description column and indicates where the item originated. Drag the cursor across the icon to see where the item originated. To view more information about an item, click the **Item Description** link.

Field or Control	Description
 (Catalog Item)	Item is from the PeopleSoft item tables.
 (Special Request)	Item is of special request type.
 (Express Form)	Item is an express form.
 (Web Supplier Update)	Item is a direct connect item using Punchout or Transparent Punchout. For a Punchout item, click this icon to be transferred to the supplier's website in edit mode. On the supplier's website you can inspect the item and change the quantity. After you check out from the supplier's website, the item is added to the requisition with the latest price and item description. To access the supplier website, the Supplier Properties page must have the ALLOW_EDIT and ALLOW_VIEW properties for the supplier.
 (Web Supplier)	Item is a direct connect item using Roundtrip. The item price and description are validated in the background against the supplier's online catalog. To validate and update the item, the supplier catalog must support the validate function.

Field or Control	Description
Substitute Item	Select to display all the substitute items related to the particular favorite item.

Adding Items to a Favorites List

You can add items to a favorites list during requisition entry by using the **Search** field at the top of the page or the Review and Submit page. After your search:

1. Select one or more items using the check box to the left of the item description.
2. Click the **Add to Favorites** link.

A message appears confirming that the items were added to the favorites list.

Adding Items to Favorites Groups

To add items to a favorite group, the items must be in your favorites list.

1. Select the items from your favorites list.
2. Click the **Add to Favorites Group(s)** link.
3. Select a favorite group or enter the group name and **description** to create a new favorite group.
4. Click the **OK** button.

Note: When an item is added to a favorites group, it no longer appears as an ungrouped item.

Deleting Items from a Favorites List

You can delete favorite items by using the Favorites page. To delete a favorite item, select it and then click the **Delete from Favorites** link. To delete a favorites group, click the **Manage Favorites Groups** link.

Using Direct Connect Items on a Favorites List

To add direct connect items to a favorites list:

1. Place direct connect items on an eProcurement requisition.
2. On the Review and Submit page, select the direct connect item and click the **Add to Favorites** button.

Note: Direct connect items cannot be added to the favorites list unless this feature has been enabled on the eProcurement Installation Options page.

To use a direct connect item that was saved as a favorite:

1. When creating a new requisition, go to the Favorites page and select the desired direct connect item. Use the Type column to identify a direct connect item by dragging the cursor across the icon.

2. Click the item description of the direct connect item or the **Add** button:
 - (Punchout items only) If the Web Supplier Update icon type appears for the direct connect item, then you are transferred to the supplier's website in edit mode. On the supplier's website, you can inspect the item and change the quantity. After you check out from the supplier's website, the item is added to the requisition with the latest price and item description. To access the supplier website, the Supplier Properties page must have the ALLOW_EDIT and ALLOW_VIEW properties for the supplier.
 - (Roundtrip items only) If the **Web Supplier** icon appears for the direct connect item, then the item price and description are validated in the background against the supplier's online catalog. To validate and update the item, the supplier catalog must support the validate function.
 - For all other direct connect items and suppliers without the edit, view, or validate properties, click the **Add** button on the Favorites page to add the item to the requisition without verification from the supplier that the item information is current. Click the item description on the Favorites page to display the catalog description.
3. Once you have completed your requisition, access the Review and Submit page and click the **Save** button. The requisition is now saved and, in addition, any new information obtained from the supplier's website, such as a price change, is used to update the direct connect item in the Favorites list.

Keep in mind the following points when working with direct connect favorite items:

- Direct connect items from multiple suppliers cannot be added to a requisition in one step. If you select multiple items from the Favorites list and add them all at one time by clicking the **Add** button at the bottom of the Favorites page, then the system can only validate the items if you have selected Punchout items using the same supplier. You are taken to the supplier's website to view and edit all of the selected items.
- Direct connect items and Services Procurement items cannot be added to a requisition in one step.
- Non-direct connect items can be part of the items to be added, along with direct connect items and Services Procurement items.
- If multiple suppliers or non-Punchout direct connect items exist, then the item data is not verified against the supplier's website.
- If you need to add direct connect items from multiple suppliers to one requisition, you should add each favorite item individually.

Create Requisition — Templates Page

Use the Create Requisition — Templates page (PV_REQ_NEWTEMPL) to use template items to create requisitions.

Create new templates and add items to existing templates.

Navigation:

eProcurement > Create Requisition > Templates

This example illustrates the fields and controls on the Templates page.

Create Requisition ?

Welcome Kenneth Schumacher

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search Templates Long Search Advanced Search

Filter by

Template Types
KIT (1)
Personal (1)

Search "Long"
Templates - 2 results returned.

Templates Search Results ? Find First 1-2 of 2 Last

▶ Sport Kit Quantity Add

▼ AFTEST

No Image Long Sleeve Biking Jersey, Men's
Contract Inventory (Available)
Item ID 10000
Supplier Item ID
Lead Time Days 10
Mfg Item ID BICY-10000
Price 20.0000 USD
UOM Each
Quantity 1.0000

Supplier Name Emel's Diner
Supplier ID 0000000044
Manufacturer Bicycle Small Component
Manufacturer ID BICYCLESMC
UPN Type
UPN ID

No Image Wireless Cycle Computer
Contract Inventory (Available)
Item ID 10017
Supplier Item ID
Lead Time Days 6
Mfg Item ID EMACHINES001
Price 29.0000 USD
UOM Each
Quantity 1.0000

Supplier Name Bike Shopper
Supplier ID SCM0000001
Manufacturer eMachines
Manufacturer ID EMACHINES
UPN Type GTIN
UPN ID 67867867867867

Click the **Expand Section** button to view items that belong to the template.

Purchasing kits and templates are included in this list. Purchasing kits display the item, quantity, and UOM. Templates display the same information as search results and favorites. It can be customized using the customize search results option.

Use the **Quantity** field to enter the number of sets that you want.

Click the **Add** button to add all items in the template to the requisition.

The user can select the **Substitute Item** icon to display all the substitute items related to the template item.

Create or Add Item to Personal Template

To create or add items to a personal template:

1. Access the Review and Submit page.
2. Select the items that you want to add to an existing template or a new template.
3. Click the **Add to Template(s)** button.
4. Select a template or enter the template name and description to create a new template.
5. Click the **OK** button.

You can also add items to templates from the Search Results page.

You can view and add personal templates by clicking the **Manage Personal Templates** link on the Templates page. On clicking this link a modal window opens, where you can view the details of the available templates and add new templates. You can also copy another user's personal template.

Note: Personal templates can be deleted only from the Manage Personal Templates page.

Using Direct Connect Items on a Personal Template

To add direct connect items to a personal template:

1. Access the Favorites page or the Checkout — Review and Submit page.
2. Select the direct connect items that you want to add to an existing template or a new template. For one template, all direct connect items must come from the same supplier. You can mix direct connect items with non-direct connect items; however, you cannot add Service Procurement items into the same personal template with direct connect items.
3. Click the **Add to Template(s)** button.
4. Select a template or enter the template name and description to create a new template.
5. Click the **OK** button.

Note: Direct connect items cannot be added to a template unless this feature has been enabled on the eProcurement Installation Options page.

To use a direct connect item that has been saved in a template:

1. When creating a new requisition, go to the Templates page, find the template, and enter the quantity desired.
2. Click the **Add** button:
 - (Punchout items only) If the Supplier Properties page has the ALLOW_EDIT and ALLOW_VIEW properties for the supplier, you are transferred to the shopping cart of the supplier's website. You can use the shopping cart to review the Punchout items from your template and change the quantities. After you check out from the supplier's website, you are returned to PeopleSoft eProcurement, and the Punchout items are added to the requisition with the latest price and item description.
 - (Roundtrip items only) If the supplier catalog supports the validate function, the price and description of the Roundtrip items are validated in the background against the supplier's online catalog.
 - For all other direct connect items and suppliers without the edit, view, or validate properties, the direct connect items on your template are added to the requisition without verification from the supplier that the item information is current.
3. Once you have completed your requisition, access the Review and Submit page and click the **Save** button. The requisition is now saved and, in addition, any new information obtained from the supplier's website, such as a price change, is used to update the direct connect item on the template.

Create Requisition — Forms Page

Use the Create Requisition — Forms page (PV_EXP_FORMS) to select forms to include in requisitions.

Navigation:

eProcurement > Create Requisition > Forms

This example illustrates the fields and controls on the Forms Page.

Create Requisition ?

Welcome Kenneth Schumacher

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search Forms Search Advanced Search

All Request Options

- Catalog
 - All Purchase Items
 - Computer Equipment
 - Hardware Catalog
 - Outdoor Supplies
- Web
 - Oracle Exchange
 - CDW
- Express Item Entry
- Special Requests
- Services Procurement
 - Resource
 - Deliverable
 - Multi Resource
- Forms
 - Business Card SDF
 - Business Cards

Forms ?

Form Name	Description
Business Card SDF	Order Customized Company SDF Business Cards
Business Cards	Order customized company Business Cards

You can access Forms from the left navigation menu or from the workspace. By default, five forms will be shown. You can click any of the available forms to view the complete form detail. If required, you can add it to the cart.

Create Requisition — Web Page

Use the Create Requisition — Web page (PV_REQ_MERCHANTS) to select Punchout or Roundtrip direct connect suppliers for requisitions.

Navigation:

eProcurement > Create Requisition > Web

This example illustrates the fields and controls on the Web page.

Create Requisition ?

Welcome Kenneth Schumacher

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search Web Search Advanced Search

All Request Options

- Catalog
 - All Purchase Items
 - More...
- Web
 - Computer Depot
 - More...

Web ?

Merchant	Description
Computer Depot	Computer hardware and accessories online warehouse.
XYZ Tools shop	General tools and supplies.
ABC Office	Office Supplies online store for businesses.

Use this page to select a direct connect supplier that can be added to this requisition. This page uses the direct connect methods of Punchout and Roundtrip.

See Understanding the Integration Between the Oracle Business Network, PeopleSoft eProcurement, and PeopleSoft eSettlements.

See [Understanding Direct Connect Supplier Integration](#).

Create Requisition — Special Requests Page

Use the Create Requisition — Special Requests page (PV_REQ_SPECIAL_REQ) to add special requests to requisitions.

Navigation:

eProcurement > Create Requisition > Special Requests

This example illustrates the fields and controls on the Special Request page.

The screenshot displays the 'Create Requisition' page for 'Special Requests'. The interface includes a top navigation bar with 'Home Menu', 'My Preferences', 'Requisition Settings', and '0 Lines'. A sidebar on the left lists various request options like 'Catalog', 'Web', 'Express Item Entry', 'Services Procurement', 'Forms', 'Favorites', 'Templates', 'ePro Services', 'Recently Ordered', and 'External Catalogs'. The main content area is titled 'Special Requests' and contains several sections: 'Item Details' with fields for Item Description, Price, Quantity, Category, Currency (USD), Unit of Measure, Due Date, and Amount Only; 'Supplier' with fields for Supplier ID, Supplier Name, and Supplier Item ID; 'Manufacturer' with fields for Mfg ID and Mfg Item ID; and 'Additional Information' with a large text area. At the bottom, there are checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher', along with a 'Request New Item' checkbox and an 'Add to Cart' button.

Use the Special Request page to create requisitions for items or goods that are not included in the standard catalog of items in PeopleSoft eProcurement and have no item ID. This special request can be for goods or services.

Related Links

[Understanding Special Requests and Express Forms](#)

[Requesting Special Items](#)

[Requesting eProcurement Services](#)

Create Requisition - eProcurement Services Page

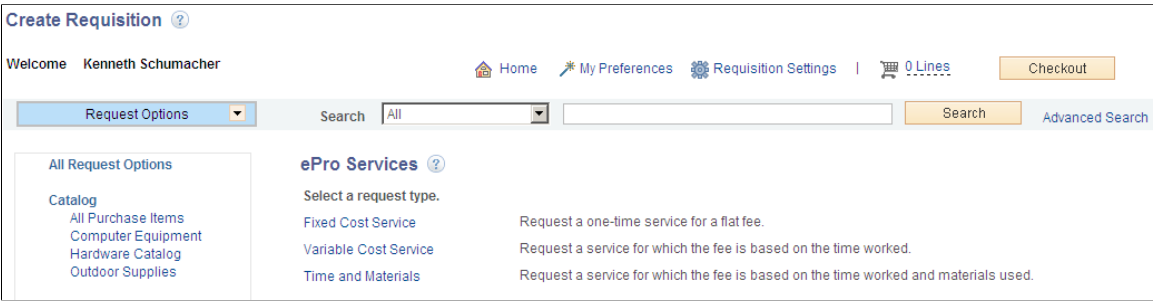
Use the Create Requisition - eProcurement Services page (PV_REQ_SERVICES) to include services in requisitions.

This page is used for Service Procurement only.

Navigation:

eProcurement > Create Requisition > ePro Services

This example illustrates the fields and controls on the eProcurement Services page.



You can click any of the eProcurement services listed in the eProcurement Services page to view that particular service page. You can enter all the required information and add it to the cart.

Create Requisition - Services Procurement Page

Use the Create Requisition - Services Procurement page (SP_REQ_BROWSE) to add service requests to requisition.

Navigation:

eProcurement > Create Requisition > Services Procurement

This example illustrates the fields and controls on the Services Procurement page.



You can access Services Procurement from the left navigation menu or from the workspace. Service requests are divided into three groups. They are Resource, Deliverable, and Multi Resource. Only if Service Procurement is installed are service requests available.

Create Requisition - Express Item Entry Page

Use the Create Requisition - Express Item Entry page (PV_EXPRESS_REQ) to enter details for express items.

Navigation:

eProcurement > Create Requisition > Express Item Entry

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

You can enter item details and add this page to the cart. However, the item details entered are not retained the next time you access this page. You will see a blank form again.

Item Information

Click on the Item Information Tab to view or update item details.

Field or Control	Description
Supplier Item ID	Enter the item ID used by the supplier for this item.
Supplier's Catalog	Enter the item ID used by the supplier for this item.
Manufacturer ID	Enter the item ID that the supplier uses for this item.
Manufacturer's Item ID	Enter the manufacturer's item ID that the supplier uses for this item.
UPN Type	Select applicable UPN Type Code.

Field or Control	Description
UPN ID	Select applicable universal product number that is defined by a unique combination of item ID, manufacturer ID, manufacturer item ID, and Unit of Measure. On selecting the UPN ID, the item line information associated with the selected UPN ID will be populated. For inventory items, if you have set up the information in the Item Manufacturer UPN table, this information appears by default into the contract. If you order by UPN ID, the item ID and related information is copied to the purchase order or requisition line. The system verifies that the UPN ID is valid for inventory items and matches what is set up in the Item Manufacturer UPN table. When the Inventory Item ID has been left blank, an attempt will be made to retrieve the Inventory Item (from the Item Manufacturer UPN table) based on the UPN ID entered. UPN ID is the only value required for looking up the item in the Item Manufacturer UPN table. If a match with the Item Manufacturer UPN Table has been found, all of the fields associated with the UPN ID (Item ID, UPN Type, Mfg ID, Mfg Item, and UOM) will be defaulted onto the transaction line along with other Item attributes required for the requisition like Item description, Price, Supplier etc. No confirmation message will be displayed. Note: For description only items (ad hoc items), you do not have the option to select UPN Type and UPN ID from the prompt. UPN ID and UPN Type values will default from the contract.

Create Requisition - Recently Ordered Page

Use the Create Requisition - Recently Ordered page (PV_REQ_RECENT_ORD) to view recently ordered and approved items.

Navigation:

eProcurement > Create Requisition > Recently Ordered

This example illustrates the fields and controls on the Recently Ordered page.

Create Requisition ?

Welcome **Kenneth Schumacher**

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search All Search Advanced Search

Recently Ordered ?

Max Scroll Amount reached - returning with first 50 requisitions. * Sort By Description

Search Results Find First 1-50 of 50 Last

Most Recent Order Date 09/17/2018

Tripp Lite High Speed HDMI Cable Digital Video w

Item ID Supplier Item ID Supplier XYZ Delivery Service Supplier ID USA0000006

Lead Time Mfg Item ID Manufacturer Manufacturer ID

Price 9.8900 USD

UOM Each

Quantity 1 Add Add to Favorites Add to Template(s)

TEST ITM Most Recent Order Date 09/06/2018

Contract Inventory (Available)

Item ID ITEM69201814241 Supplier Emel's Diner Supplier ID 0000000044 Preferred

Lead Time Mfg Item ID Manufacturer Manufacturer ID

Price 5.0000 USD

UOM Each

Quantity Add Add to Favorites Add to Template(s)

TEST ITM Most Recent Order Date 09/06/2018

Contract Inventory (Not Available)

Item ID ITEM492018412522 Supplier Emel's Diner Supplier ID 0000000044 Preferred

Lead Time Mfg Item ID Manufacturer Manufacturer ID

Price 5.0000 USD

UOM Each

Quantity Add Add to Favorites Add to Template(s)

Items displayed on this page are retrieved based on the last modified date. The number of items displayed on this page is based on the settings in the eProcurement Installation Options page.

Create Requisition - External Catalogs Page

Use the Create Requisition - External Catalogs page (PV_REQ_TPOMERCH) to view all available Transparent Punchout suppliers.

For information on supplier setup, see [Maintaining Supplier Integration](#).

Navigation:

eProcurement > Create Requisition > External Catalogs

This example illustrates the fields and controls on the External Catalogs page.

On this page, you can view a list of all available suppliers. When you click any supplier, you can view all the items belonging to the supplier. You can select any required item and add it to the cart.

Note: This page will not be available if the Consolidate Item Search Results and Facets Option check box is selected on the eProcurement Installation Options page.

When the Consolidate Item Search Results and Facets Option check box is selected both internal and external catalog items are combined under the request option Catalog.

This example illustrates the fields and controls on the Create Requisition — Catalog search result page.

Supplier attribute icons such as Green Supplier, Woman Owned Business, and Small Business for external and internal items are displayed in the search result. A maximum of five attribute icons will be shown to the user. Hover over the icons to see the attribute name. If there are more than five attributes then a *more...* link will be displayed. On clicking this link a popup window opens displaying up to 20 attributes along with the respective icons. A new facet called Supplier Attribute is created so that you can narrow down your search result based on this. The supplier attribute icons and item images are available only when creating a new requisition. During a search, items without suppliers are placed in *No Value* supplier attribute category.

Note: Supplier attributes and icons are not available if the Consolidate Item Search Results and Facets Option check box is not selected on the eProcurement Installation Options page.

Submitting Requisitions

After defining items for a requisition, use the **Checkout** button to review the contents of the requisition, make final adjustments, or add last-minute items to the requisition.

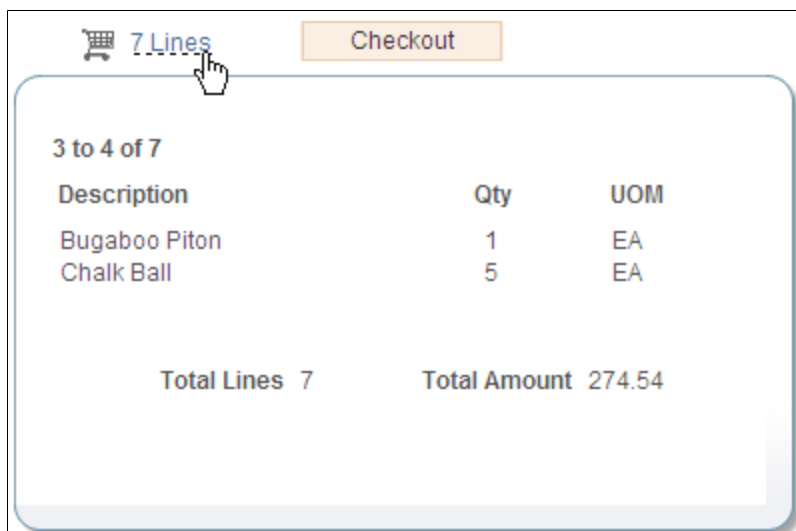
This section discusses how to review, edit, and submit requisitions, add comments to the requisition lines, edit line, shipping, and accounting information, change distribution information, edit shipping for all lines, maintain value added tax details for shipping lines, add multiple comments at the requisition header, and confirm requisition checkout information.

Understanding Requisition Checkout

Once you have added requisition items to the cart, click on the Checkout button to review, edit and submit the requisitions for approval. You will be taken to the Checkout – Review and Submit page where you can save the requisition and submit it for approval immediately or save for later. Apart from editing the requisitions you can add comments and attachments to them as well. You can also enter justification for requiring approval for the requisition.

If you want to add more items for requisition click on the Add More Items button on the Checkout - Review and Submit page. You will be transferred to the Create Requisition page where you can search and select the additional items and add to the cart. On this page you will see a Shopping Cart icon and Total Lines hover over hyperlink displayed next to the Checkout button.

This example illustrates the fields and controls on the Cart Summary page.



The screenshot shows the Cart Summary page. At the top left is a shopping cart icon next to a link labeled "7 Lines". To the right is an orange "Checkout" button. Below these is a rounded rectangle containing a table of items. The table has three columns: "Description", "Qty", and "UOM". It lists two items: "Bugaboo Piton" with a quantity of 1 and unit of measure "EA", and "Chalk Ball" with a quantity of 5 and unit of measure "EA". At the bottom of the rounded rectangle, it displays "Total Lines 7" and "Total Amount 274.54".

Description	Qty	UOM
Bugaboo Piton	1	EA
Chalk Ball	5	EA

Total Lines 7 Total Amount 274.54

The Total Lines represent the total number of lines of the entire requisition. The Total Amount represents the total amount of the entire requisition. If VAT (value added tax) is enabled for the business unit, the Total Amount is inclusive of the VAT amount.

The Total Lines hover over hyperlink opens in a hover over pop-up window and it displays a summary of the item description, quantity, units of measure, total lines and total amount in transaction currency of all items in the cart for a particular chunk set.

If the number of items added on a new requisition exceeds the chunking limit and you then select either the Check Budget or Pre-Check Budget buttons on the Checkout page you will get a warning message that the requisition will be saved in Open Status before the budget checking is performed. After budget checking you will remain on the Checkout page which will then be displayed in edit mode.

Note: Requisition Inquiry and Reports and View Printable Version will be unaffected by requisition chunking.

See [Understanding Requisition Chunking](#)

A floating shopping cart displays items that are added to the Cart (item description, quantity ordered, units of measure (UOM), total number of lines and the total amount (expressed in the transaction currency). If chunking is enabled and you are in edit mode then the lines will be displayed in chunks i.e. the current active chunk will be displayed. Click the Checkout button to navigate to the Checkout - Review and Submit page to review and checkout the selected requisition items.

This example illustrates the fields and controls on the Floating shopping cart.

The screenshot shows a floating window titled "Shopping Cart". It contains a table with the following data:

Description	Qty	UOM
1337 Desktop PC Motherboa...	2	EA
1337 Desktop PC Motherboa...	2	EA
17 inch LCD Display Compu...	1	EA
17 inch LCD Display Compu...	1	EA
20 inch LCD Computer Moni...	1	EA
20 inch LCD Computer Moni...	1	EA
3.80 GHz Desktop PC, 16 G...	1	EA

Below the table, the summary shows:

Total Lines	13
Total Amount (USD)	10250.50

At the bottom of the window are two buttons: "Close" and "Checkout".

The floating cart appears constantly when you review and add items to the cart and it can be dragged and placed at different locations on the page. Select the Close button to close the floating cart window. Item description texts more than 25 characters are truncated and not completely visible in the floating cart. You have to hover over the description to view the complete text.

The floating cart will automatically appear when you add items to the cart if the Auto display shopping cart when adding items check box is selected on the My Preferences page. It will also appear when you choose the Cart icon or the Total Lines hyperlink on the Create Requisition page even if the check box is not selected.

The floating cart will appear when adding requisition items from the following pages: Search Results, Catalog, Express Item Entry, Special Requests, Forms, Favorites, Templates, ePro Services, Web, External Catalogs, and Recently Ordered.

Pages Used to Submit Requisitions

Page Name	Definition Name	Usage
<u>Review and Submit Page</u>	PV_REQ_CHECKOUT	Review, edit, and submit requisitions that have not been submitted for approval. Also, submit requisitions for approval.
<u>Requisition Settings Page</u>	PV_REQ_SETTINGS	Settings on this page can be used to default or override header, line, shipping instructions, and accounting details for all the requisition lines.
<u>Line Details Page</u>	PV_REQ_LN_DTLS	Confirm requisition checkout information and edit additional details for a line, such as the buyer, supplier, and other line-specific information.
<u>Line Comment Page</u>	PV_REQ_COMMENTS_NW	Record one or more comments about an requisition line and add attachments. You are limited to one comment unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS.
Standard Comments Page	PV_STD_COMM_SEC	Use this page to apply a standard comment as a comment to the requisition line or requisition header. Standard comments are frequently used comments that have been defined in the system using the Standard Comments (STANDARD_COMMENTS) and Standard Comment Type (STD_COMMENT_TYPE) components. Enter search criteria of Comment Type, Comment ID, or Description and then click the Search button to display the standard comments. Select a standard comment and click OK to apply the comment to the requisition.

Page Name	Definition Name	Usage
Include Item Specifications Page	PV_ITEM_SPEX	Use this page to apply the item's specifications as a comment to the requisition line. The item specifications are defined on the Item Specifications page (ITEM_SPEX_PUR) located in the item definition (Purchasing Attributes component). The item specifications are automatically included as a line comment if the Copy to Transactions check box has been selected on the Item Specifications page.
Requisition Ship To Comments Page	PV_REQ_COMMENTS_NW	Record one or more comments with the Ship To value on the requisition shipment schedule line. You can also include attachments.
<u>Edit Lines/Shipping/Accounting for Selected Lines Page</u>	PV_REQ_MASSCHG_SEC	Modify line, shipping instructions, and accounting details for selected requisition lines.
<u>Distribution Change Options Page</u>	PV_REQ_DIST_CHNG	Select how to apply distribution changes to the selected lines of your requisition.
<u>Edit Shipping For All Lines Page</u>	PV_REQ_MASSCHG_SEC	Apply Ship to Location, One Time Address, Due Date, Attention To and Shipping Comment to all requisition shipping lines.
<u>Maintaining VAT Details For Schedule Page</u>	REQ_SCHED_VAT	Maintain value added tax details for shipping lines.
<u>Header Comments Page</u>	PV_REQ_COMMENTS_NW	Record one or more comments about a requisition and add attachments. You are limited to one comment at the header-level of the requisition unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS.
<u>Confirmation Page</u>	PV_REQ_WF_PREVIEW	Confirm requisition checkout information.

Note: Standard comments and item specifications are role action controlled. If role action MULTI_COMMENTS is disabled then these links will not appear.

Review and Submit Page

Use the Review and Submit page (PV_REQ_CHECKOUT) to review, edit, and submit requisitions that have not been submitted for approval.

Also, submit requisitions for approval.

Navigation:

eProcurement > Create Requisition > Checkout

This example illustrates the fields and controls on the Checkout — Review and Submit page. You can find definitions for the fields and controls later on this page.

Checkout - Review and Submit
Review the item information and submit the req for approval.

Requisition Summary

Business Unit: US001 US001 NEW YORK OPERATIONS Requisition Name:
 *Requester: VP1 Kenneth Schumacher Priority: Medium
 *Currency: USD Card Number:
 Expiration Date: ☐ Use Procurement Card

Cart Summary: Total Amount \$7.99 USD
 Expand lines to review shipping and accounting details [Add More Items](#)

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Apple USB C Digital AV Multiport		Bike Shopper	1.0000	Each	79.1900	79.19			
2	StarTech.com DisplayPort to DVI		Bike Shopper	1.0000	Each	18.8000	18.80			

☐ Select All / ☐ Deselect All Select lines to: [Add to Favorites](#) [Add to Template\(s\)](#) [Delete Selected](#) [Mass Change](#)

Shipping Summary
[Edit for All Lines](#)
 Ship To Location: US001
 Address: 144 North Street, New York, NY 10168
 Attention To: Kenneth Schumacher
 Comments:

Requisition Comments and Attachments
 Enter requisition comments:
☐ Send to Supplier ☐ Show at Receipt ☐ Shown at Voucher [Add more Comments and Attachments](#)

Approval Justification
 Enter approval justification for this requisition:

[Save & Submit](#) [Save for Later](#) [Add More Items](#) [Preview Approvals](#) [Add Request Document](#)

javascript:submitAction_win(document.win('PV_REQ_HDR_WRK_MY_PREFERENCES'))

This example illustrates the fields and controls on the Custom Fields for Requisition Header page. You can find definitions for the fields and controls later on this page.

Custom Fields for Requisition Header

Custom Character 1:
 Custom Character 2:
 Custom Date:
 Custom Field 1:
 Custom Field 2:
 Custom Field 3:
 Custom Field 4:

[OK](#) [Cancel](#)

Use this page to review, edit, and submit a requisition for approval.

Field or Control	Description
Requester	Displays the name of the requester for this requisition. To purchase on behalf of another requester, you can change this field. However, you must have the CHANGEREQBU role action from the eProcurement Role Actions page assigned to the user roles in the user ID. Also, the user preferences for the user ID must specify that you are authorized to enter for other requesters.
Requisition Name	Enter a description of the request to help you identify this requisition as it flows through the system. If this field is left blank, the system uses the requisition ID as the name.
Currency	Select the base currency that is used to calculate pricing for each item on the requisition.
Priority	Select the urgency for a requisition workflow approval. Values are <i>Low</i> , <i>Medium</i> , and <i>High</i> .
Card Number	Select a valid procurement card.
Custom Fields	Select to view the Custom Fields for Requisition Header page that opens in a pop-up window. In the Custom Fields for Requisition Header page that pops up enter required data for the custom fields. The custom field data will appear in the Manage Requisitions – Requisition Details page.
Use Procurement Card	Select this check box to use the procurement card entered in the Card Number field.
Line	Displays the line number for this requisition item.
 (Expand Section icon)	Displays information that pertains to this specific line.
	Select the icon to display its related substitute item.
Description	Select the description of the item to view the Item Description page for more information about the item.
Supplier Name	Displays the name of the supplier who supplies this item.
Add More Items	Select to access the Requisition page where you can browse through all the catalogs and add any items to the cart.

Field or Control	Description
Quantity	Displays the units of this requisition item that you are ordering. You can change the value.
UOM (unit of measure)	The ordering UOM for this item.
Price	Displays the price per unit.
	Indicates a price discrepancy between the original Punchout price and Contract price.
	Indicates a contract is being used and the price is different than the original price.
 (Line Details icon)	Choose this icon to access the Line Details page, where you can modify additional details on the line, such as the buyer, supplier, and other line-specific information.
 (Add/Edit Comments icon)	Choose this icon to access the Line Comments page, where you can record a comment or attach a file to this requisition line. The eProcurement role action of MULTI_COMMENTS determines what features are available on the Line Comments page.
Total Amount	Displays the extended price for this requisition line, which the system calculates by multiplying the unit price by the quantity that you order.
Add to Favorites	Select to add selected items to the favorites list. A message appears confirming that the item has been added to the favorites list.
Add to Template(s)	Select to add selected items to a template. The Add Selected Items to Template(s) page appears, where you can select an existing template or create a new template.
Mass Change	Select to access the Modify Lines/Shipping/Accounting details for selected lines, where you can change the shipping location, delivery date, and so on. You can also change the accounting information for this requisition line.
Delete Selected	Select to delete selected items from this requisition. You select items using the check box to the left of the item description.
Requisition Comments and Attachments	Enter a comment for this requisition at the header level. You can also add attachments to the requisition.

Field or Control	Description
Add more Comments and Attachments	Select to access the Header Comments page where you can enter additional comments for the header level of this requisition and also include one or more attachments to your comments. To view the More Comments link, your user ID must be connected to the eProcurement role action of MULTI_COMMENTS.
Send to Supplier	Select if you want the header-level requisition comment recorded above to appear on the purchase orders that are dispatched to suppliers. If the comment is for internal use only, leave the check box deselected.
Show at Receipt	Select if you want the header-level requisition comment recorded above to appear on the receipt documents.
Show at Voucher	Select if you want the header-level requisition comment recorded above to appear on the vouchers.
Check Budget	Select this link to initiate the Budget Processor and commit funds to pre-encumbrance amount for this requisition. This button displays only if Commitment Control has been enabled for PeopleSoft Purchasing and eProcurement. The requisition is automatically saved before the budget check is performed. If the requisition is in add mode when you click this link, a message appears that the requisition will be saved in <i>Open</i> status and budget check process is initiated. Once the process is complete the page goes to edit mode.

Field or Control	Description
Pre-Check Budget	Select this link to initiate the Budget Processor and check the budget without reserving funds for this requisition. This option enables you to check whether a budget exists for this requisition before committing amounts to a pre-encumbrance. The requisition is automatically saved before the budget check is performed and the page is changed to edit mode. The button only displays if: - You have enabled commitment control for PeopleSoft Purchasing and eProcurement by selecting the Purchasing check box in the Enable Commitment Control group box on the Installation Options-Products page. - You have enabled the <i>pre-check budget</i> feature, by selecting the Purchasing check box in the Enable Budget Pre-Check group box of the Installation Options-Commitment Control page. If the requisition is in add mode when you click this link, a message appears that the requisition will be saved in <i>Open</i> status and budget check process is initiated. Once the process is completed, it remains on the Edit Requisition – Review and Submit page and the page goes to edit mode. If the Requisition is in edit mode when you choose this link, budget check process is initiated. Once the process is completed, the requisition is transferred to the Confirmation page if the Requisition Header status is Approved or Pending. Otherwise, the requisition remains on the Edit Requisition – Review and Submit page if it is in Open status. This budget check process also applies to the Check Budget button.
Budget Status	Displays the results of a budget check initiated by selecting the Check Budget button or the Pre-Check Budget button. The options are: <i>Valid</i>: The requisition passed budget checking and the Budget Processor has updated the control budget ledger (LEDGER_KK) <i>Not Checked</i>: The Budget Processor has not processed the requisition. <i>Error</i>: The requisition failed budget checking. <i>Provisionally Valid</i>: The requisition passed budget checking but no pre-encumbrance or encumbrance was created in the control budget ledger. This status is used when you select the Pre-Check Budget button. Note: For some scenarios budget checking is automatically done by the system. For example if the requisition status is approved and if Change Request is triggered then budget is automatically checked when you save and submit the requisition. However you can also manually validate the budget by selecting on the Check Budget button.

Field or Control	Description
Save & Submit	Select to save the requisition and submit it for approval, sourcing, and dispatching to a supplier. It remains editable while the status is <i>Open</i> or <i>Pending</i> . When you use this button, the system displays the Confirmation page to inform you that the request has been successfully saved and provide summarized information about the request including the requisition ID and total price.
Save for Later	Select if you want to save the requisition for later review or submission.
Add Request Document	Select to access the Add a Document page, which provides information about the requisition. You must then select the document type that you want to use to create the document and respond to wizard questions concerning the new requisition document. A requisition document is one that contains responses to wizard questions. Contract specialists can use these responses to determine proper terms and conditions for a contract document when the requisition becomes a contract. This link is available when PeopleSoft Supplier Contract Management has been installed and the application installation options have been set to use document types and to use documents with purchase order requisitions. You must also setup document types to use only with purchase order requisitions and must also be set up. After you create the document, use the Modify Request Document link to update and edit the document.

Reviewing and Modifying Requisition Line Information

Choose the Expand Section icon on the Review and Submit page.

This example illustrates the fields and controls on the Reviewing and Modifying Requisition Line Information. You can find definitions for the fields and controls later on this page.

Requisition Lines ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	25 inch Desktop LCD Monitor, W	A002	Midton Computer Supplies	1,0000	Each	125.0000	125.00		Add	

Shipping Line 1

*Ship To US001
Address 144 North Street
New York, NY 10168
Attention To Kenneth Schumacher
Due Date

Accounting Lines

*Distribute By Qty Accounting Tag Multi-Accounting Tags

Accounting Lines

Chartfields1 Chartfields2 Chartfields3 Details Dejaits 2 Asset Information Asset Information 2 Budget Information

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		US001	1,0000	100.0000	125.00	US005	

This example illustrates the fields and controls on the Requisition Value Adjustments page.

Requisition ID NEXT

Line 1

Schedule 1

Item 10000

Status Active

Long Sleeve Biking Jersey, Men's

Adjusted Price

Current Price 20.00000 USD

Sort Value Adjustments

Value Adjustments

Find | View All

First 1 of 1 Last

*Seq 1

*Type BAS Base

Base Price Type Supp Std

*Adj Meth Amt

Adjustment Amount 20.00000

System Adjustment Info

Ship To

Quantity Needed

Actual

UOM

OK

Cancel

Custom Fields for Line 1 and Schedule 1 page

Custom Fields for Line 1 and Schedule 1

Custom Character 1

Custom Character 2

Custom Date 1

Custom Date 2

Custom Field 1

Custom Field 2

Custom Field 3

OK

Cancel

The requisition line section displays information that is specific to the expanded line.

Field or Control	Description
Price Adjustment	Select to view the requisition value adjustments, which opens in a pop-up window. This link is role controlled by users with specific role name and eProcurement role action VIEW_PRICEADJUSTMENTS.
Maintenance WO	Associate a work order for maintenance repairs or service for the requisition line item.

Field or Control	Description
Pegging Workbench	Use to link to items that are being received into an inventory business unit.
Custom Fields	Select to view the Custom Fields for Line 1 and Schedule 1 page that opens in a pop-up window. In the Custom Fields for Requisition Line1 and Schedule 1 page that pops up enter required data for the custom fields. The custom field data entered will appear in the Manage Requisitions – Requisition Details page for requisition line details.
Add Shipto Comments	Select to access the Requisition Ship To Comments page where you can enter additional comments for the Ship To value on the shipment schedule level of this requisition and also include one or more attachments to your comments. To view the Add Shipto Comments link, your user ID must be connected to the eProcurement role action of MULTI_COMMENTS.
Ship Via	Edit Ship Via Code value if required. Note: This field is visible only if SHIPVIA_FREIGHT_DISPLAY role action is enabled.
Freight Terms	Edit Freight Terms Code value if required. Note: This field is visible only if SHIPVIA_FREIGHT_DISPLAY role action is enabled.
Add One Time Address	Select the Add One Time Address link to access the Shipping Address page where you can enter a shipping address that is not currently defined in the system as a ship to location. The system uses this feature for shipments to a location that will not be used again, for example, shipments to a construction site or other temporary location. You can also load the default shipping address. Select OK to save the address. This link is not available if the user is linked to the eProcurement role action of NO_ONETIME_SHIPTO.

Field or Control	Description
Accounting Tag	Use the prompt to select an appropriate Accounting Tag that will be used to populate ChartFields on transaction distribution lines. The system automatically prorates the amount of an accounting line according to the proration percentages defined on the Accounting Tag. Note: Accounting Tag field appears only if Accounting Tag check box is selected for eProcurement on the Accounting Tag Registration page. See “Setting Up Accounting Tags” (Application Fundamentals)
Multi-Accounting Tags	Click Select to open the Accounting Tags modal window where you can choose multiple accounting tags from the Accounting Tag list. Note: The Accounting Tag field and Multi-Accounting Tags link are editable/enabled only if role action ACCOUNTING_DISPLAY is assigned to the action <i>Editable</i>. It will be hidden if role action ACCOUNTING_DISPLAY is assigned to the action <i>Hide</i> and will be display only if role action ACCOUNTING_DISPLAY is assigned to the action <i>Display Only</i>.
Accounting Lines	Use this section to create multiple ChartFields for a specific line. In Details 2 tab you can click the Custom Fields link to access the Custom Fields for Line 1 and Schedule 1 and Distribution 1 page that opens in a pop-up window.

Note: If the Amount Only check box is selected for requisition line and the requisition line is associated to Amount Only Work Order Schedule, then the Schedule Date, Amount, Currency fields are displayed. The Schedule Date, Amount, Currency fields are from WO schedule and not from the Requisition.

For more details on editing a requisition see [Edit Requisition-Review and Submit Page](#)

Related Links

[Maintaining System Users and Roles](#)

Line Details Page

Use the Line Details page (PV_REQ_LN_DTLS) to confirm requisition checkout information and edit additional details for a line, such as the buyer, supplier, and other line-specific information.

Navigation:

Select the **Line Details** icon on the Review and Submit page.

This example illustrates the fields and controls on the Line Details page (1 of 2). You can find definitions for the fields and controls later on this page.

Line Details

No Image

Line 1

Steelhead/Salmon Flies

Line Status Pending

Item Details

Merchandise Amount 1.15 CAD

Item ID 10102

Category FISHING

Original Substituted Item 10101

Description Rocket Taper Fly Line, Sinking

Physical Nature Goods

Buyer VP1

[Buyer Information](#)
[Configuration Info](#)

☐ RFQ Required
☐ Device Tracking
☐ Zero Price Indicator
☐ Stockless Item
☐ Amount Only
☐ Inspection Required

Contract Information

☒ Use Contract if Available

Contract ID 00000000000000000000000000000009

[Contract Details](#)

Version 1

Contract Line

Category Line

This example illustrates the fields and controls on the Line Details page (2 of 2). You can find definitions for the fields and controls later on this page.

▼ Supplier Information ?	
Supplier ID	SCM0000002  Dellz
Supplier Location	MAIN  MAIN
	Suggest New Supplier
Supplier Item ID	
Supplier's Catalog	
▼ Manufacturer Information ?	
Manufacturer ID	BUSSMAN 
Manufacturer	Bussman
Manufacturer's Item ID	131313 
UPN Type	GTIN 
UPN ID	23112311 
▼ Procurement Group Information ?	
Procurement Group ID	 ☐ Primary Unit
Unit Allocation Qty	
▼ Sourcing Controls ?	
☒ Consolidate with other Reqs	☐ Inventory Source Flag
☐ Calculate Price	☒ Auto Item Substitution
☐ Override Suggested Supplier	

Confirm requisition checkout information and edit additional details for a line, such as the buyer, supplier, and other line-specific information.

The various information displayed on this page such as supplier information and contract information are role action controlled and can be shown or hidden accordingly.

Field or Control	Description
Line Status	Displays the status of the requisition line. The statuses include: • <i>Approved:</i> The requisition line has completed workflow approval and is approved. The line is ready for sourcing. • <i>Cancelled:</i> The requisition line was entered and saved but then canceled. A canceled requisition line can be reopened within a certain number of days as specified for the Purchasing business unit; otherwise, it is closed permanently. • <i>Complete:</i> The requisition line is marked complete after the line is dispatched on a PO, the goods are received and the supplier is paid. A background process identifies the requisition lines and moves them to the complete status. Canceled requisition lines and those that are fulfilled by inventory stock are also identified as complete. • <i>Denied:</i> The requisition line has been denied in the approval process. • <i>Open:</i> The requisition line has been entered and saved but not yet submitted. • <i>Pending:</i> The requisition line has been submitted and is awaiting approval.

Item Details

The Item Details group box displays item information for this requisition line.

Field or Control	Description
Merchandise Amount	Displays the supplier's unit price and currency for the item, which are assigned on the Supplier's UOM & Pricing Info (supplier's UOM and pricing information) page.
Item ID	Enables the buyer to enter an item ID, when appropriate, based on the ad hoc item description entered by the requester
Original Substituted Item	Displays the original Item ID on the transaction line that was replaced when a Substitute Item was found. Once the field is populated, the original Item ID will not be overridden with another Item ID. If the Item ID field is changed directly by the Requester or Buyer, the Original Substituted Item field is cleared. Similarly, if the Supplier ID/ Location field is changed by the Requester or Buyer, then the value in the Original Substituted Item field is cleared and the value is moved back to the Item ID field.

Field or Control	Description
	This icon helps the Requester or Buyer to know whether the item has been substituted. This appears on a transaction line whenever the Original Substituted Item field is populated. If Original Substituted Item and Description fields are already displayed in the component, i.e. Requisition and PO, a text 'Substitute Item in Use' will appear.
Auto Item Substitution	Select to deselect the 'Auto Item Substitution' box on a Requisition Line when you wish to retain the current Item ID and do not want it automatically substituted during sourcing. Additionally, you will be able to reject a Substitute Item found by Auto Item Substitution on the online Requisition.
Category	Displays the item category.
Description	Displays the item description for the Original Substituted Item, if the field is populated.

Contract Information

The PeopleSoft eProcurement, PeopleSoft Purchasing, and PeopleSoft Payables applications are integrated with the procurement contract functionality to streamline the use of contracts with requisitions, purchase orders, and vouchers. As part of the contract functionality, you can set up requisitions to automatically search for a contract to use for requisitions. Applying default contract prices to requisitions enables you to receive contract prices for requisition items and to more accurately track budgets and pre-encumbrance balances. Requesters, buyers, and administrators with the appropriate security can set to search for and use contracts on transactions at various levels.

See “Applying Contracts to Requisitions” (PeopleSoft Purchasing).

Field or Control	Description
Contract ID	Displays the purchasing contract used to price this requisition line. You can enter or change a contract ID in this field or a default value can be applied by the system. In order to apply a default contract, you must select the Default Contract On Req check box on the Purchasing Definition - Business Unit Options page.
 (Contract Search icon)	Select to access the Contract Search page (CNTRCT_SRCH), where you can perform advanced searches for contracts to be applied to this requisition line.

Field or Control	Description
Use Contract if Available	Select this check box to: • Have the system use the contract ID that you have entered here in the Contract ID field. • Have the sourcing process find the best contract for this requisition line when you have left the Contract ID field blank. Deselect this check box to not use contract pricing for the requisition line. Deselecting this check box deselects the Contract ID field and prevents the sourcing process from adding a contract. Note that deselecting this check box after a default contract has already been applied does not change the applied price. The system assumes the current price is an override value and does not change it. If the item requires a contract (the Contract Required check box is selected on the Purchasing Attributes - Purchasing Controls page) then the Use Contract If Available check box on this page is selected and cannot be changed.
Category Line	Apply a contract category to this line item.

See “Understanding Voucher and Order Contracts” (PeopleSoft Source to Settle Common Information).

Supplier Information

The Supplier Information group box displays all information pertaining to the supplier.

Field or Control	Description
Supplier ID	Displays the ID of the supplier that supply this item.
 (Supplier Look Up)	Select the SupplierLookup icon to access the Supplier Search page, where you can enter information to find a supplier.
Supplier Location	Displays the location of the supplier. The default is based on the value that is defined for the supplier.
Supplier Item ID	Displays the ID that the supplier uses to identify this item on the Item Supplier page.
Supplier's Catalog	Displays Supplier's catalog detail.

Manufacturer Information

The Manufacturer information group box displays all information pertaining to the manufacturer.

Field or Control	Description
Manufacturer ID	Identifies the manufacturer of the item. This value is supplied from the Supplier's Manufacturer Info page.
Manufacturer's Item ID	Displays the identifier that the manufacturer uses for this item when the suggested supplier supplies the item. This value appears from the Supplier's Manufacturer Info page.
UPN Type	Select applicable UPN Type Code.
UPN ID	Select applicable universal product number that is defined by a unique combination of item ID, manufacturer ID, manufacturer item ID, and Unit of Measure. On selecting the UPN ID, the item line information associated with the selected UPN ID will be populated.

Sourcing Controls

Use this section to alter sourcing options for the selected requisition line. You can select applicable check boxes. As it is role action controlled some check boxes will be display only.

Field or Control	Description
Calculate Price	Select check box to have the sourcing process recalculate the item price when this requisition line enters the sourcing stage.

Line Comment Page

Use the page (PV_REQ_COMMENTS_NW) to record one or more comments about an requisition line and add attachments.

You are limited to one comment unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS.

Navigation:

Click the **Add Comments** icon on the Review and Submit page.

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

Field or Control	Description
 (Add a New Row icon)	Select to add a new comment field. Comments are numbered as you add them.
Use Standard Comments	Select this link to access the Standard Comments page (PV_STD_COMM_SEC) where you can select a standard comment to be applied as a comment to this requisition line. Standard comments are frequently used comments that have been defined in the system using the Standard Comments (STANDARD_COMMENTS) and Standard Comment Type (STD_COMMENT_TYPE) components. See “Setting Up Standard Comments” (PeopleSoft Source to Settle Common Information).
 (Spell Check Comment icon)	Click to perform a spell check on the comment.
Add Attachments	Click to access the File Attachments window where you can browse and select a file to be attached to this comment. Multiple files can be attached to one comment. Once a file is attached, the Attachments group box displays the file details including file name, the user who attached it, and the date/time it was attached. The Send to Supplier check box applies to each file separately.
Send to Supplier	Select if you want the corresponding comment to appear on the purchase order that is dispatched to the supplier. Attachments can be sent with the purchase order. If the comment or attachment is for internal use only, leave the check box deselected.
Show at Receipt	Select if you want this comment to appear on the receipt documents.

Field or Control	Description
Show at Voucher	Select if you want this comment to appear on the voucher.
OK	Select the OK button to return to the Review and Submit page with the comments and attachments that you have added on this page.
Cancel	Select the Cancel button to return to the Review and Submit page without saving the changes added to this page.

Edit Lines/Shipping/Accounting for Selected Lines Page

Use the Edit Lines/Shipping/Accounting for Selected Lines page (PV_REQ_MASSCHG_SEC) to modify line, shipping instructions, and accounting details for requisition lines. However you cannot use it to modify requisition lines and requisition schedule lines that are already sourced to PO and other systems.

Navigation:

Select the **Mass Change** button on the Review and Submit page.

This example illustrates the fields and controls on the Edit Lines, Shipping, and Accounting Information page. You can find definitions for the fields and controls later on this page.

Edit Lines/Shipping/Accounting for Selected Lines

Line Information ?

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier ID
Supplier Location

Buyer
Category

Shipping Information

Ship To Location

Due Date
Attention

Comments

Accounting Lines

Accounting Tag

Please enter GL Business Unit before selecting other chartfield values

Accounting Information
Personalize | Find |
First 1 of 1 Last

Chartfields1 | Chartfields2 | Chartfields3 | Details | Asset Information

Dist	Percent	Location	GL Unit	Account	Alt Acct
1	100.000	US001	US005	100004	

+ -

Load Values From Defaults

The requisition line number that you selected on the Review and Submit page appears for you to work with.

Field or Control	Description
Supplier ID	Change the supplier for this specific line. When you click the Apply button, the supplier ID replaces the data on the selected lines.
Supplier Location	Change the supplier location for this specific line. When you click the Apply button, the supplier location replaces the data on the selected lines.
Buyer	Change the buyer for this specific line. When you click the Apply button, the buyer replaces the data on the selected lines.
Category	Change the category for this specific line. When you click the Apply button, the category replaces the data on the selected lines.

Shipping Information

Field or Control	Description
Ship To Location	Review or change the ship to location code. This code identifies the shipping address for this request.
Address	Select the Add One Time Address link to access the Shipping Address page where you can enter a shipping address that is not currently defined in the system as a ship to location. The system uses this feature for shipments to a location that will not be used again, for example, shipments to a construction site or other temporary location. Click OK to save the address. This link is not available if the user is linked to the eProcurement role action of NO_ONETIME_SHIPTO.
Due Date	Review or change the arrival date of this shipment. The date that you enter here is a suggested date. When the purchase order is created, the system or buyer attempts to meet this date or changes it to a realistic due date.
Attention	Enter the name of the individual who should receive the items or services. Once the shipment is received, this individual should record the receipt, enabling the buyers to track the quality and promptness of the supplier.

Field or Control	Description
Ship Via	Edit Ship Via Code value if required. Note: This field is visible only if SHIPVIA_FREIGHT_DISPLAY role action is enabled.
Freight Terms	Edit Freight Terms Code value if required. Note: This field is visible only if SHIPVIA_FREIGHT_DISPLAY role action is enabled.
Comments	Enter any comments. If there is already a default or existing comment then the comment you add will be appended to the existing content. But if there are comments for other ship then it will be overwritten. To view the Comments field your user ID must be connected to the eProcurement role action of MULTI_COMMENTS.

Accounting Lines

Use this section only if you need to change the accounting information for the selected requisition lines. The default structure is derived from the user profile, the item category, and the Define Requisition page.

Select the appropriate values for the requisition line if you must deviate from the default accounting structure.

Field or Control	Description
SpeedChart	Select a SpeedChart Key by clicking the prompt. Based on the SpeedChart key selected, the system automatically distributes the accounting line amounts according to the proration percentage defined for the selected SpeedChart. You can modify the distribution values. Note: This field is visible only if role action ACCOUNTING_DISPLAY is assigned to the action <i>Editable</i>. It will be hidden if role action ACCOUNTING_DISPLAY is assigned to the action <i>Hide</i> or <i>Display Only</i> action. SpeedChart will be invisible if Accounting Tag is enabled.

Field or Control	Description
Accounting Tag	Use the prompt to select an appropriate Accounting Tag that will be used to populate ChartFields on transaction distribution lines. The system automatically prorates the amount of an accounting line according to the proration percentages defined on the Accounting Tag. Note: This field is visible only if role action ACCOUNTING_DISPLAY is assigned to the action <i>Editable</i>. It will be hidden if role action ACCOUNTING_DISPLAY is assigned to the action <i>Hide</i> or <i>Display Only</i> action.
Dist	Displays the distribution line number.
Load Values From Defaults	Select this link to load the fields on this page with defaults specified on the Requisition Settings page. The default values replace Distribution line values.

Note: The ChartField values on the tabs; *Chartfields1*, *Chartfields2*, and *Chartfields3* are described further in this documentation.

Accounting Lines — Asset Information Tab

Select the Asset Information tab.

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

Field or Control	Description
AM Business Unit	Identify the Asset Management business unit that is responsible for tracking asset transactions.

Field or Control	Description
Profile ID	Select a value that represents the default value from the Item Categories - Category Definition page. An asset profile ID on a purchase order, in conjunction with an asset business unit, indicates that PeopleSoft Asset Management is to be notified of the purchase of this item when it is received. To access the Category Definition page, select Items > Define Controls > Item Categories > Category Definition .
Capitalize	Select to indicate that the requisition item is capitalized.
Cost Type	Select the asset cost type, such as materials, labor, and overhead. Cost types are used with asset category and transaction codes to determine into which accounts the costs are entered in the general ledger.

Related Links

“Using Accounting Tags in PeopleSoft Classic” (Application Fundamentals)

Distribution Change Options Page

Use the Distribution Change Options page (PV_REQ_DIST_CHNG) to select how to apply distribution changes to the lines of your requisition.

Navigation:

After entering changes in the Accounting Information group box of the Edit Line/Shipping/Accounting for Selected Lines page > click the OK button.

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

Distribution Change Options

For the selected requisition lines, apply distribution changes to

- ☒ **All Distribution Lines**
Apply changes to all existing distribution lines.
- ☐ **Matching Distribution Lines**
Apply changes to each existing distribution line by matching the distribution line numbers.
- ☐ **Replace Distribution Lines**
Remove the existing distribution lines and replace with the distribution lines changes.

Use this page to determine how the system applies accounting distribution changes to the selected lines.

The options that appear on this page are dependent on the changes that you make. Select one of the following options and click the OK button to apply a change.

Field or Control	Description
All Distribution Lines	Select this option to apply changes to all existing distribution lines.
Matching Distribution Lines	Select this option to apply changes to each distribution line by matching the distribution line numbers.
Replace Distribution Lines	Select this option to remove the existing distribution lines and replace them with the distribution line changes.

This page displays three options only if the user has opted for one default distribution line on the Requisition Settings page or on the Edit Lines/Shipping/Accounting for Selected Lines page. This page will not appear if there is no change in the distribution section of the requisition line or if the distribution section is hidden or display-only. Instead, the system will display a message informing users that changes will be applied to the lines/schedules

This page will display only two options if the user chooses multiple default distribution lines on the Requisition Settings page or on the Edit Lines/Shipping/Accounting for Selected Lines page. The All Distribution Lines option will not be available for selection.

This example illustrates the fields and controls on the Distribution Change Options — 2 options page.

Distribution Change Options

For the selected requisition lines that are available for sourcing, apply distribution changes to

☒ **Matching Distribution Lines**
Apply changes to each existing distribution line by matching the distribution line numbers.

☐ **Replace Distribution Lines**
Remove the existing distribution lines and replace with the distribution lines changes.

OK Cancel

When chunking is enabled if the user edits an existing requisition (for changes initiated from the Requisition Settings page), the system displays a message asking if all the requisition lines are to be loaded:

- If you select *Yes* then all the lines are loaded with changes to the Edit Requisition – Review and Submit page and chunking icons do not appear. You must save, submit, and edit the requisition again for the chunking icons to reappear.
- If you select *No* then the system will not continue to load all the lines. No changes are made and the chunking icons remain on the page.

For applying distribution changes from the Edit Lines/Shipping/Accounting for Selected Lines page, the default values on this page will be applied to the corresponding fields only for selected lines on the Review and Submit page.

For the All Distribution Lines and Matching Distribution Lines options, the percentage change on the Requisition Settings page or on the Edit Lines/Shipping/Accounting for Selected Lines page will not alter the percentage value of the existing requisition lines. If you select the Replace Distribution Lines option, the default distributions on the Requisition Settings page or on the Edit Lines/Shipping/Accounting for Selected Lines page will replace the existing distributions on the Review and Submit page. Default distributions are not overridden or provided by default to the sourced/canceled/closed distribution lines. Distribution lines that are to be applied on the Review and Submit page will be recalculated based on the SpeedChart/Accounting Tag percentage selected on the Requisition Settings page and the Edit Lines/Shipping/Accounting for Selected Lines page. When modified, if the recalculated percentage exceeds 100 percent, then the system will display a message instructing the user to readjust the total distributed percentage to 100 percent. Accounting Tags offer the same functionality as SpeedCharts, with some enhancement with respect to the ability to assign favorite tags and additional component, product, user, and permission list security options.

Edit Shipping For All Lines Page

Use the Edit Shipping For All Lines page (PV_REQ_MASSCHG_SEC) to edit shipping information for all lines.

Navigation:

To access this page (from Checkout – Review and Submit page, click on Edit for All Lines link).

This example illustrates the fields and controls on the Edit Shipping For All Lines Page.

When chunking is enabled, the system displays a message asking if all requisition lines are to be loaded.

- If you select *Yes* then all the lines are loaded with changes to the Edit Requisition – Review and Submit page, and chunking icons are not displayed. The Shipping Summary section is also updated with the latest changes on the entire Requisition. You must save, submit, and edit the requisition again for the chunking icons to reappear.
- If you select *No* then the system will not continue to load all the lines. No changes are made and the chunking icons remain on the page.

Maintaining VAT Details For Schedule Page

Use the page (REQ_SCHED_VAT) to maintain value added tax details for shipping lines.

Navigation:

Click the **Shipping VAT** link on the Review and Submit page.

Use this page to make adjustments to VAT shipping details. Information that appears on the page relates to the item on the line number of the requisition and the shipping line that you selected on the Review and Submit page.

This example illustrates the fields and controls on the Maintaining VAT Details for Shipping Lines. You can find definitions for the fields and controls later on this page.

Requisition Schedule VAT

Maintain Requisitions

VAT Information for Schedule 1

Requisition ID NEXT Item A004 802.11 g/b Desktop PC Router,
 Line 1 Status Active
 Schedule 1

[Return to Schedule Page](#)

[Expand All Sections](#) [Collapse All Sections](#)

▼ Physical Nature

Physical Nature Goods

▶ VAT Locations

VAT Defaults

▶ VAT Registrations

▶ VAT Controls

▶ VAT Treatments

▶ VAT Details

▼ Adjust/Reset VAT Defaults

[Adjust Affected VAT Defaults](#) ⓘ Click this button if you want the system to adjust the VAT Defaults on this page affected by changes you have made to this page. All changes you have made to VAT Defaults that affect other VAT Defaults will be retained.

Levels This level only [Reset All VAT Defaults](#) Click this button if you want the system to reset all the VAT Defaults. All changes you have made to VAT Defaults will be lost.

Before you can review VAT details on this page, make sure that you are an administrator:

1. Define VAT default value settings for the business unit.

To access the field, select **eProcurement > Administer Procurement > Maintain Business Units > Processing Options** and click the **VAT Default** link.

2. Select the **Calculate VAT on Req** (calculate value added tax on requisition) check box.

To access the check box, select **eProcurement > Administer Procurement > Maintain Business Units > Purchasing Definition > Business Unit Options**.

3. Assign the user role action *VAT Details* to the role name.

To access the check box, select **eProcurement > Administer Procurement > Maintain System Users and Roles > eProcurement Role Action** select *VAT Details* as the **Action Name**, and add the user role for the role action.

See [Maintaining System Users and Roles](#).

4. Select the **View/Override VAT Details** check box to authorize a requester to view and update VAT information.

To access the check box, select **eProcurement > Administer Procurement > Maintain Procurement Users > User Preferences** click the **Procurement** link, and then click **Requisition Authorizations**.

5. (Optionally) Select a value in the **Allow Override Recovery/Rebate** field to enable a requester to override system-created VAT recovery and rebate percentage values.

To access the field, select **eProcurement > Administer Procurement > Maintain Business Units > Processing Options** click the **VAT Default** link, and select a value.

Values include:

- *Do Not Allow Override.*
- *Override Both Recovy/Rebate %* (override both recovery and rebate percentages).
- *Override Rebate % Only* (override rebate percentage only).
- *Override Recovery % Only*(override rebate percentage only).

Field or Control	Description
Line	Displays the line number to which VAT information on this page pertains.
Schedule	Displays the schedule number from the requisition.
Return to Schedule Page	Click to access the Review and Submit page, where you can update shipping information.
Physical Nature	Displays whether the requisition is for goods or services. This is determined by the type of requisition that you created.

VAT Locations

Field or Control	Description
Ship From Country	Select the seller's country from which the requisition item for this line is to be shipped.
Ship From State	Select the state, province, or area from which the item is to be shipped.
Ship to Country	Displays the buyer's country where the item is being shipped. You define this value on the shipping address.
Ship to State	Displays the state, province, or area where the item is being shipped. You define this value on the shipping address.

VAT Defaults

Field or Control	Description
Reporting Country	Select the VAT registration country in which this transaction takes place.
Defaulting State	Select the state for recording VAT details.
Supplier Registration Country	Select the VAT registration country in which the seller does business.
Supplier Registration ID	Enter the VAT registration identifier for this supplier.
Exception Type	Select a value to indicate that an exception to the VAT was issued. Exception values are <i>None</i> , <i>Exonerated</i> , and <i>Suspended</i> .
Certificate ID	Enter a certificate ID if an exception was issued for the VAT.
Calculate at Gross or Net	Select to calculate the VAT. Values include: <i>Net:</i> When this option is selected, the early payment discount is applied to the goods amount before the VAT is calculated. The amount of VAT that is calculated using this method is the amount that is to be paid, regardless of whether the early payment discount is actually taken at the time of payment. <i>Gross:</i> When this option is selected, the VAT is initially calculated based on the gross transaction amount. The early payment discount is not taken into account at this point. However, in some countries an adjustment is made to the VAT amount at the time of payment if the early payment discount is taken.
Recalculate at Payment	Select to have the system recalculate VAT at the time of payment if a discount has been taken. This field value appears by default from the VAT entity. If the Calculate at Gross or Net field value is <i>Gross</i>, the check box is selected. If the field value is <i>Net</i>, the check box is deselected.

Field or Control	Description
Include Freight	Select if the freight amount needs to be taxed. The system adds the freight amount to the gross or net amount before calculating VAT. This setting appears by default from the VAT entity.
Include Miscellaneous	Select if miscellaneous charges need to be taxed. The system adds the miscellaneous charges to the gross or net amount before calculating VAT. This setting appears by default from the VAT entity.
Declaration Point	Select when to declare VAT. Values are: <i>Delivery:</i> Declares VAT when shipments are received. <i>Invoice:</i> Declares VAT when a transaction is invoiced. <i>Payment:</i> Declares VAT when payment is tendered
Rounding Rule	Select the rounding rule for VAT amounts. Values are: <i>Natural Round:</i> Amounts are rounded normally (up or down) to the precision that is specified for the currency code. <i>Up:</i> Rounds up and limits rounding precision to one additional decimal place. <i>Down:</i> Rounds down. Rounding only affects VAT amounts, the currency numbers stored in the system, and how currency numbers are printed on reports.
Apply Domestic Reverse Charge	Select if this country requires the use of the domestic reverse charge provision.
Use Type	Determines VAT recoverability. The field value is retrieved from the VAT default hierarchy, but you can override this value. Use type is a type of activity in which a purchased good or service is to be used, and therefore, you use it to determine a recoverability percent and a rebate percent (when applicable) that is to be applied to a transaction line. Activities are categorized as taxable, exempt, or mixed. Where activity is mixed, you can associate either the ratio of taxable activity to exempt activity directly with the use type, or you can indicate that this ratio is determined at the ChartField level.

Field or Control	Description
Treatment	Select a value that controls VAT default and transaction behavior. It is a description of how the transaction must be treated for VAT purposes. This is used to determine how VAT defaults are applied, what accounting entries are required, and how and whether the transaction is reported on the VAT return. You can override the value in this field. Values are: <i>Domestic Goods Purchase</i> <i>Domestic Service Purchase</i> <i>EU Goods Purchase</i> (European Union goods purchase) <i>EU Service Purchase</i> (European Union service purchase) <i>No VAT Processing</i> <i>Outside of Scope</i> <i>Self-Assess Goods Import</i> <i>Self-Assess Service Import</i> <i>Zero-Rated Goods Import</i>
Applicability	Select whether VAT should be calculated for this schedule. While most requisitions may be subject to VAT for any VAT countries, some items or item categories may be exempt or outside of scope for VAT. You can override the default value here.
VAT Code	Select the tax code that is used to define a percentage that the system uses to determine the VAT amount. The VAT code is similar to the sales and use tax code, with a few exceptions. The tax authority that is associated with the VAT code generally consists of a single authority, and the ChartFields for a VAT code don't reside with the tax authority but are determined by the combination of the VAT code, VAT account type, and VAT transaction type.
Record Output VAT	Select to have tax for this transaction charged on the supply of goods or services. You may want to select this check box for drop shipments.
Tax Rate	Displays the rate at which this item is taxed.

Field or Control	Description
Transaction Type	Select a value to categorize VAT transactions according to particular VAT accounting and reporting requirements. The system uses the VAT code and transaction type in conjunction with the VAT account type to obtain the ChartFields for accounting entries.
Adjust Affected VAT Defaults	Click to adjust the VAT defaults on this page that are affected by changes that you have made on the page. Changes that you have made to the defaults that affect other VAT defaults are retained.
Levels	Displays the level of information (obligation) that intracommunity sales and purchases require. This information is used mainly in France to reduce the declarative workload for small- and medium-sized industries. PeopleSoft delivers the Intrastat form with the most restrictive level (Level 1), which covers all levels of obligation. This is an informational field that determines the level that is checked on certain Intrastat reporting forms.
Reset All VAT Defaults	Click to reset all the VAT defaults. Changes that you have made to VAT defaults are reset to their original values.

Related Links

“Understanding VAT” (PeopleSoft Global Options and Reports)

Header Comments Page

Both the Header Comments page and the Requisition Ship To Comments page use the same fields. Navigation is different and each page adds comments and attachments to a different part of the requisition.

Use the Header Comments page (PV_REQ_COMMENTS_NW) to record one or more comments about a requisition and add attachments.

You are limited to one comment at the header-level of the requisition unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS.

Navigation:

Select the **Add more Comments and Attachments** link on the Review and Submit page.

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

Header Comments

Business Unit US001

Requisition Date 12/06/2012

Status Pending

Comments

Find First 1 of 1 Last

Use Standard Comments

Entered On:

+ -

1

☐ Send to Supplier

☐ Show at Receipt

☐ Show at Voucher

Add Attachments

Attachments

Attached File	User/Date Time	View	Send to Supplier	
1		View	☐	-

OK

Cancel

This example illustrates the fields and controls on the Requisition Ship To Comments page. You can find definitions for the fields and controls later on this page.

Requisition Ship To Comments

Business Unit US001

Requisition Date 12/06/2012

Status Pending

Ship To US001

Comments

Find First 1 of 1 Last

Use Standard Comments

Entered On:

+ -

1

☐ Send to Supplier

☐ Show at Receipt

☐ Show at Voucher

Add Attachments

Attachments

Attached File	User/Date Time	View	Send to Supplier	
1		View	☐	-

OK

Cancel

Field or Control	Description
+ (Add a New Row icon)	Select to add a new comment field. Comments are numbered as you add them.
Use Standard Comments	Select this link to access the Standard Comments page (PV_STD_COMM_SEC) where you can select a standard comment to be applied as a comment to this requisition. Standard comments are frequently used comments that have been defined in the system using the Standard Comments (STANDARD_COMMENTS) and Standard Comment Type (STD_COMMENT_TYPE) components. See “Setting Up Standard Comments” (PeopleSoft Source to Settle Common Information).

Field or Control	Description
 (Spell Check Comment icon)	Select to perform a spell check on the comment.
Add Attachments	Select to access the File Attachments window where you can browse and select a file to be attached to this comment. Multiple files can be attached to one comment. Once a file is attached, the Attachments group box displays the file details including file name, the user who attached it, and the date/time it was attached. The Send to Supplier check box applies to each file separately.
Send to Supplier	Select if you want the corresponding comment to appear on the purchase order that is dispatched to the supplier. Attachments can be sent with the purchase order. If the comment or attachment is for internal use only, leave the check box deselected.
Show at Receipt	Select if you want this comment to appear on the receipt documents.
Show at Voucher	Select if you want this comment to appear on the voucher.
OK	Select the OK button to return to the Review and Submit page with the comments and attachments that you have added on this page.
Cancel	Select the Cancel button to return to the Review and Submit page without saving the changes added to this page.

Requisition Header Comments

When editing an existing requisition that has the multi-comment role action enabled and requisition chunking is being used, the system handles header comments as stated:

- The Review and Submit page within the Edit Requisition component displays only the first header comment entered on the page. When moving from one chunk to another chunk, only the first header comment is displayed on the Edit Requisition-Review and Submit page.
- If you have more than one header comment, the More Comments link is available within the header Comments group box. When you click on the More Comments link, all header comments are displayed with attachments (if added).

Confirmation Page

Use the Confirmation page (PV_REQ_WF_PREVIEW) to confirm requisition checkout information.

Navigation:

Select the **Save & submit** button on the Review and Submit page.

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

Confirmation

Your requisition has been submitted.

Requested For Michael Buhler	Number of Lines 2
Requisition Name 0000000005	Total Amount 2,231.77 FRF
Requisition ID 0000000005	VAT Amount 249.61 FRF
Business Unit FRA01	Requisition Amount 2,481.38 FRF
Status Approved	Pre-Encumbrance Balance 2356.57 FRF
Priority Medium	
Budget Status Valid	

 [View printable version](#)
 [Edit This Requisition](#)
 [Check Budget](#)
 [Pre-Check Budget](#)

The Confirmation page displays basic information about the requisition and the number of items that it contains. It appears when you submit a requisition .

Field or Control	Description
Requested For	Displays the name of the person requesting these materials or services. This can be your name or you can purchase on behalf of another person. For you to purchase on behalf of another user, these requesters must be defined on the User Preferences page.
Number of Lines	Displays the number of lines on this requisition.
Requisition Name	Displays a description of the request to help you identify this requisition as it flows through the system. If this field is left blank, the system uses the requisition ID as the name.
Business Unit	Displays the PeopleSoft Purchasing business unit that holds this requisition.
Status	Displays the status of a requisition. Values are <i>Open</i> , <i>Pending</i> , <i>Approved</i> , and <i>Complete</i> .
Priority	Displays the priority of the requisition. The values are <i>Low</i> , <i>Medium</i> , or <i>High</i> .

Field or Control	Description
Budget Status	If the Commitment Control feature is turned on, then this field displays the current budget checking status for this requisition. Note: For some scenarios budget checking is automatically done by the system. For example if the requisition status is approved and if Change Request is triggered then budget is automatically checked when you save and submit the requisition. However you can also manually validate the budget by clicking on the Check Budget button.
VAT Amount (value added tax amount)	Displays the amount of value added tax (VAT) calculated on a VAT enabled requisition. It does not appear when the Calculate VAT on Requisition check box at purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment, the VAT_DETAILS eProcurement role action is not used and the user eProcurement role is not added to the user ID profile.
Pre-Encumbrance Balance	Displays the Pre-encumbrance balance amount after requisition is successfully budget checked. Pre-encumbrance balance is displayed in the transaction currency of the requisition and is based on the transaction budget date, general ledger unit and commitment control ledger group. Pre-encumbrance balance can be partially or fully liquidated from purchase order(s). Click the Pre-Encumbrance Balance amount hyperlink to view requisition accounting entries. You can use this page to view accounting information details including the commitment control ledger group and transactions that have been performed against the requisition.
Edit This Requisition	Select to access the Edit Requisition component, where you can make changes to the requisition and submit it again.
View printable version	Select this link to review an online requisition that shows the layout of the printed version. The requisition opens up as a second window and can be printed. The Oracle BI Publisher is used to generate this report and you can customize it. You can choose to display this report with or without the distribution details.
Manage Requisitions	Select to go to the Manage Requisitions component, where you can further process the requisition.
Create New Requisition	Select to add a new requisition.

Understanding Requisition Chunking

Requisition chunking is determined by the setting of the **Requisition** field on the eProcurement Installation Options page.

When adding requisition lines in add mode, the system displays all requisition lines and ignores requisition chunking. If you click the **Save for Later** button, the requisition will save in Open status. If you click the **Save and Submit** button, the requisition will save in either Approved or Pending status, depending on whether or not approval workflow is enabled.

When editing a requisition, if the total number of requisition lines exceeds the chunking limit, then chunking is enabled and chunking navigation icons appear before the requisition lines details. If the total number of requisition lines does not exceed the chunking limit, then chunking functionality is not enabled.

When editing a requisition in Open status when chunking is enabled, the system will always save the requisition in Open status when moving from one chunk to subsequent chunks, with or without making changes. After you click the **Save and Submit** button, the requisition will become either Approved or Pending, depending on whether approval workflow is enabled, and then will transfer to the Confirmation page.

When editing a requisition in Pending, Approved, Denied or See Lines status with approvals and chunking enabled, the system will always save and submit the requisition for approval when moving from one chunk to another. If no changes are made to the requisition and you click the **Save and Submit** button, the existing requisition status will remain as it is. If changes are made to the requisition, the system will update the requisition status appropriately and initiate workflow approvals again. When editing a requisition in Approved, Denied or See Lines status and then clicking the **Save for Later** button, the system will not save the requisition to Open status. If some requisition lines were already sourced to POs, you will see a message when you click the **Save for Later** button.

If chunking is enabled and you add an item to a requisition, then the item is added to the end of the current chunk and the total number of lines increases by one.

When adding a similar item to the cart that is not on the current chunk but is on subsequent chunk, it will be added to the end of the requisition of the current chunk as a new line item. However if the same item is added to the cart that is also on the current chunk, then it will increment the quantity of that line item instead of adding it as a new line item.

Adding Direct Connect Items when Requisition Chunking Is Used

If chunking is enabled and you add Direct Connect items from a supplier website to an eProcurement requisition in edit mode, the new items are added to the current chunk set if the total number of lines exceeds the chunking limit. If the total number of lines does not exceed the chunking limit, then the new items are added to the end of the requisition.

Deleting Lines when Requisition Chunking Is Used

If the last line of a requisition is not sourced to a purchase order and no change tracking option is defined, then you can delete that line. When you add a new line item to the requisition, the system rennumbers the new item as the same line number that was deleted. For example, if line 10 of 10 is deleted and a new line is added, then the new line is rennumbered as line 10.

If you delete a line that is not the last line of the requisition and not sourced to a purchase order when change tracking is turned off, then the system does not assign the new item the same number as the deleted line. The new item is added to the end of the requisition and the line number is incremented by one. For example, if line 6 of 10 is deleted and a new line is added, then the new line is numbered as line 11.

Chunking navigation icons are not hidden on the requisition page when the total number of lines equals or is less than the chunking limit until you click the **Save for Later** button. If you continue to add items until the total number of lines exceeds the chunking limit, then you must save and submit and then re-edit the requisition in order to view the chunking navigation icons.

Using a Requisition Change Request When Requisition Chunking Is Used

When editing an eProcurement requisition after it has been sourced to one or more purchase orders and chunking is in effect, only the first chunk of requisition lines is presented and no changes can be made to any requisition lines if Change Request Role Action is not added or if the Role Action is added but Action Control is disabled for a specific eProcurement Role user.

However, if Change Request Role Action is added and Action Control is enabled for a specific eProcurement role user and, in addition, the **Change Tracking** option is set to *Sourced* and a Change Template is selected on a Purchasing Business Unit Definition, then when editing an eProcurement requisition after it has been sourced to one or more purchase orders and chunking is in effect, the user can make a change request to the eProcurement requisition from chunk to chunk. The system will display an appropriate message to the user when changes are made from chunk to chunk, and the requisition will be saved at the appropriate status.

Note: Chunking is available only while a requisition is being edited.

Creating and Managing Requisitions Using the Fluid User Interface

Understanding PeopleSoft Fluid User Interface for eProcurement

Click to watch a short video about the eProcurement [Fluid Requisition Enhancements](#)

Oracle's PeopleSoft has two user interfaces:

- The PeopleSoft Classic User Interface, which is designed to be used on a laptop or desktop.
- The PeopleSoft Fluid User Interface, which is optimized for mobile devices and can be used on laptops and desktops.

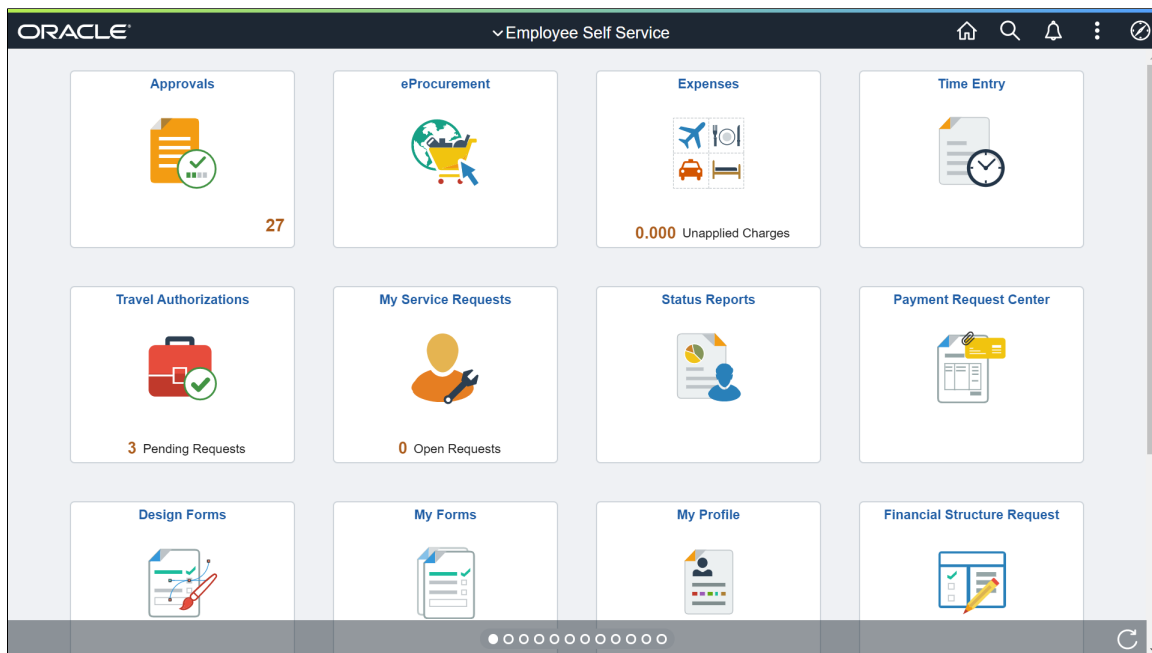
PeopleTools documentation regarding the PeopleSoft Fluid User Interface includes:

- *PeopleTools: Fluid User Interface Developer's Guide*.
- *PeopleTools: Applications User's Guide*, Working With PeopleSoft Fluid User Interface.

A PeopleSoft Fluid User Interface home page, which is designed by a system administrator, appears when a user logs into the system. From this home page users can view notifications, access applications, and navigate through the PeopleSoft system by selecting individual tiles.

The eProcurement tile can be added to any user home page, as shown in the image below.

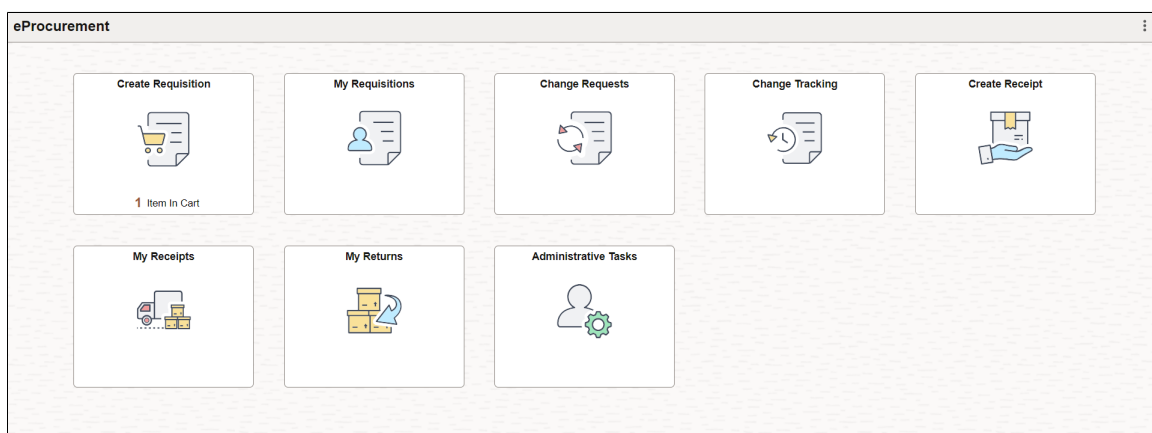
This example illustrates an example of a Fluid Home page.



Select a tile to access another home page, if you have access to multiple home pages. The tiles that appear on a home page display notification information. A tile can also be a button that accesses an application page where you can complete business transactions.

The eProcurement Home page consists of create requisition, my requisitions, create receipt, my receipts, my returns, requisition change requests, requisition change tracking, and administrative tasks tiles to access transaction pages using the Fluid user interface.

This example illustrates an example of the eProcurement Home page.



Note: The Administer Order Sheets under Administrative Tasks tile is visible only to those administrators who have been assigned to the Permission List *EPPV6500*.

Common Elements Used with Fluid Requisitions

<i>Field or Control</i>	<i>Description</i>
 (Home)	Click to return to the main home page for the user.
 (Search)	Click to enter a global search.
 (More Actions)	Select to see the list of available actions such as the eProcurement Homepage, My Requisitions, Create Receipt, My Receipts, My Returns, Review Change Requests, and Review Change Tracking.
 (NavBar)	Click to expand the NavBar window, where you can select window content from options, such as Recent Places, My Favorites, Navigator, My Preferences, and Fluid Home. Click again to collapse the NavBar window.
 (Advanced Catalog Search)	Select to enter search terms, such as UPN ID to find requisition items. There are three different Search Results pages (PV_MOB_855_SRCH, PV_MOB_855_SRCHDC, and PV_MOB_855_SRCHFAY). The main page (PV_MOB_855_SRCH) can be configured through the Settings page. Search results are grouped based on Catalog items, Favorites, and Punchout; and displayed on different pages. The Catalog items search includes internal catalog items and external items from a marketplace. If the marketplace supports it, both internal and external catalog items appear on the same page based on the marketplace setup. A page indicator, displayed at the bottom of the Search Results page, indicates the search results belonging to different item categories. Select the page indicator to view other search results.
 (Cart)	The number indicates how many items are in the cart.
 (Defaults and Settings)	Select to access the Requisition Defaults Page , and eProcurement Requisition Settings .

Field or Control	Description
 (Menu)	Select to open and close the left menu panel.
Sort By	Select any of the sort options (Description, Price - high to low, Price - low to high, and Relevance) in the <i>Sort By</i> drop-down to reorganize the search result. To configure the sort options, see Search Settings Page and Manage Weighted Sort Rules Page .
 (Actions button)	Select to display related actions that can be performed for the item. For example, Add to Cart, Add to Templates, and Add to Favorites.
Contract link	Select to access the Contract List window. This window displays item details, contract details and contract reference information. This link is only displayed when a contract is associated with the item.
Inventory link	Select to view the Item Availability window. This window displays item ID and ship to information with a message about availability for the ship to location. This link is only displayed when item availability is not available from the default shipping location.
Price Breaks link	Select to view the Supplier Price Breaks window. This window displays item and supplier information, as well as the supplier price for specific item quantities, also known as price breaks. This link is only available when price breaks are available for the item and from the supplier.
 (Preferred Supplier)	Displays this icon when the item has a preferred supplier. The preferred supplier appears on the Search Results and Item Details pages.
Item Details	Select any item name link to view the Item Details Page .
 (Add to cart)	Select this button to add an item to your cart.
 (Add to Favorites)	Select to add the item to your Favorites list. The icon changes color (fills in) if you have already added the item to your favorites.

Field or Control	Description
 (Add to Templates)	Select to add the item to your Templates. The icon changes color (fills in) if you have already added the item to your templates.
 (Notifications)	Click to view actions and alerts in a notifications window.

Setting Up the Fluid User Interface to Create Requisitions

Pages Used to Set up the Fluid User Interface to Create Requisitions

Page Name	Definition Name	Usage
<u>eProcurement Requisition Settings</u>	PV_MOB_SRCHSET_SCF	View and edit preferences.
<u>Requisition Type Template Page</u>	PV_REQTYPE_TMP_FL	Enable or disable Custom fields (for Header and Line) display in the drop-zone area of the requisition.
<u>Manage Weighted Sort Rules Page</u>	PV_WSR_CREATE_FL	Administrators can define a rule with weights and visibility for multiple attributes.
<u>Requester Mass Change Page</u>	PV_MASS_CHANGE_FL	Replace the original Requester of the selected Requisitions with a new Requester
<u>Manage Amount Only By Category Page</u>	PV_MOB_AMT_ONL_CTG	Designate the Amount Only flag for the selected item category. Based on this designation, the Amount Only flag is defaulted on the Special Requests, Fixed Cost Service, Variable Cost Service, and Time and Materials pages.
<u>Requisition Page Navigation</u>	PV_LEFTNAV_FL	Configure eProcurement requisition search bar Settings, left navigation order, and labels for the Fluid User Interface.

Page Name	Definition Name	Usage
<u>Requester Item History Page</u>	PV_RQSTR_RECENT_FL	Configure the item visibility on the Create Requisition Item History page. Depending on the Purge Requester Item History and Load Requester Item History configurations, the item list appears on the Create Requisition Item History page.
<u>Maintain External Catalogs Page</u>	PV_EXTCAT_SRCH_FL	Import supplier catalogs and review import history.

eProcurement Requisition Settings

Use the Settings page (PV_MOB_SRCHSET_SCF) to set up user preferences for the required pages.

Navigation:

eProcurement Tile > Create Requisition

Click  icon and then Settings.

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

Settings

Search Results Fields

Select the fields to be displayed in Search Results

Item ID

☒

Supplier Details

☒

Manufacturer Details

☒

UPN Details

☒

Lead Time Days

☒

Checkout Page

Expand Distribution with Schedule ☒

Save

Restore Defaults

The values that you select on this page override what is selected on the [Setting Up Installation Options for Fluid eProcurement](#) and the [Customize Search Results Display Page](#).

Configuring Drop Zone Subpages

The approved method for using custom fields in fluid requisition is to use drop zones. In eProcurement, you need to set up subpages for header, line, schedule, distribution, or only for the sections for which you need drop zone pages.

Navigation:

PeopleTools > Portal > Configure Drop Zones

Note: The user defined fields are available on the procurement transactions when you check the Enter Custom Fields check box under General Purchasing Controls on the Purchasing Installation Options page. See “Installation Options - Purchasing Page” (Application Fundamentals).

This example illustrates the fields and controls on the Configure Drop Zones page (1 of 2).

Configure Drop Zones				
Component				
Component PV_MOB_855_CMP				
Description Fluid Requisitions				
Type Fluid				
Drop Zones by Page 21 rows				
Page Name	Tab Order	Drop Zone	Subpage Name	
PV_DZ_CUSTSCH_SCF	15	DZ-Top of Schedule Detail	PV_CUSTFLD_SCH_SBF	
PV_DZ_CUSTSCH_SCF	17	DZ-Bottom of Schedule Detail		
PV_MOB_855_CHEKOUT	16	DZ-Top of Checkout		
PV_MOB_855_CHEKOUT	145	DZ-Bottom of Checkout		
PV_MOB_855_DE2_SCF	2	DZ-Top of Line Detail		
PV_MOB_855_DE2_SCF	193	DZ-Bottom of Line Detail		
PV_MOB_855_DET_SCF	54	DZ-Top of Line Detail		
PV_MOB_855_DET_SCF	106	DZ-Bottom of Line Detail		
PV_MOB_855_ITEMDET	10	DZ-Top of Item Detail		
PV_MOB_855_ITEMDET	96	DZ-Bottom of Item Detail		

This example illustrates the fields and controls on the Configure Drop Zones page (2 of 2).

Configure Drop Zones

Component

Component PV_MOB_855_CMP
Description Fluid Requisitions
Type Fluid

Drop Zones by Page

21 rows

Page Name	Tab Order	Drop Zone	Subpage Name
PV_MOB_855_SR_CART	60	DZ-Bottom of Shopping Cart	Q
PV_MOB_CUSTDST_SCF	9	DZ-Top of Distribution Detail	PV_CUSTFLD_DST_SBF Q
PV_MOB_CUSTDST_SCF	11	DZ-Bottom of Distribution Detail	Q
PV_MOB_DISTRIB_SCF	13	DZ-Top of Schedule Detail	Q
PV_MOB_DISTRIB_SCF	146	DZ-Bottom of Schedule Detail	Q
PV_MOB_NEW_CHEKOUT	81	DZ-Top of Checkout	PV_CUSTFLD_HDR_SBF Q
PV_MOB_NEW_CHEKOUT	138	DZ-Bottom of Checkout	Q
PV_MOB_SPECIAL_REQ	51	DZ-Top of Line Detail	Q
PV_SCH_DIST_SCF	43	DZ-Top of Line Detail	PV_CUSTFLD_LIN_SBF Q
PV_SCH_DIST_SCF	210	DZ-Bottom of Line Detail	Q

For more information about Drop Zones, see “Understanding Drop Zones” (Application Fundamentals) and the product documentation for *PeopleTools: Fluid User Interface Developer’s Guide*, “Creating Pages for Fluid Applications”, Creating and Configuring Drop Zones.

Requisition Type Template Page

Use Requisition Type Template page (PV_REQTYPE_TMP_FL) to enable or disable custom fields (for Header and Line) which will be displayed in the drop-zone area of the fluid requisition component only.

The template type settings will affect fields only on fluid ePro requisitions. The fields available on the template page will depend on the fields in the records, PUR_USR_HDR_SBR for header and PUR_USR_LIN_SBR for line.

Navigation:

eProcurement > Administrative Tasks > Requisition Type Template

This example illustrates the fields and controls on the Requisition Type Template Page. You can find definitions for the fields and controls later on this page.

Requisition Type Template

*Requisition Type: Standard

☒ Copy custom field values to new requisition

Header

Field Name	Field Label	Required	Visible
CUSTOM_C100_A1	Custom Field 1	No	Yes
CUSTOM_C100_A2	Custom Field 2	No	Yes
CUSTOM_C100_A3	Custom Field 3	No	Yes
CUSTOM_C100_A4	Custom Field 4	No	Yes
CUSTOM_C1_A	Custom Character 2	No	Yes
CUSTOM_DATE_A	Custom Date	No	Yes
USER_HDR_CHAR1	Custom Character 1	No	Yes

Line

Field Name	Field Label	Required	Visible
CUSTOM_C100_B1	Custom Field 1	No	Yes
CUSTOM_C100_B2	Custom Field 2	No	Yes
CUSTOM_C100_B3	Custom Field 3	No	Yes
CUSTOM_C100_B4	Custom Field 4	No	Yes
CUSTOM_C1_B	Custom Character 2	No	Yes
CUSTOM_DATE_B	Custom Date	No	Yes
USER_LINE_CHAR1	Custom Character 1	No	Yes

Field or Control	Description
Requisition Type	Select the Requisition Type (Standard, Bill Only, and Bill and Replace) from the drop-down. The Header and Line custom fields will appear on the selected type of requisitions. Standard is the normal ePro Requisition used in the past.
Copy custom field values to new requisition	Select Copy custom field values to new requisition to allow to copy the custom field values from previously saved requisition to new requisition. If this is turned off, then custom field values will never be copied when a requisition is copied.
Header and Line	Provides the list of Header and Line custom fields available for the drop-zone area of the requisition pages. - If the <i>Visible</i> button is set to <i>Yes</i>, the selected Header and Line custom fields will appear in the drop-zone area of the requisition. - If the <i>Required</i> button is set to <i>Yes</i>, the custom fields will appear as mandatory fields. Note: If any custom field is marked as required but selected as not visible, then this field will not be validated and it will not appear on the Requisition pages.

Manage Weighted Sort Rules Page

Use Manage Weighted Sort Rules page (PV_WSRULE_SRCH_FL) to define weight for the attributes (for example, contract = 10, inventory = 5, preferred supplier = 10, and so on) and whether that attribute will be visible on the search row. Administrators can define a rule with weights and visibility to multiple attributes, which is used by the Relevance Weighted Sort to dynamically push the items with the highest total weight to the top of the search results.

For each Rule ID, a number of attributes can be selected and determine the weighting of that attribute and also control whether that attribute will be visible on the search row.

Navigation:

eProcurement > Administrative Tasks > Weighted Sort Rules

This example illustrates the fields and controls on the Manage Weighted Sort Rules Page. You can find definitions for the fields and controls later on this page.

Manage Weighted Sort Rules

Weighted Rule

Add New

3 rows

Weighted Sort Rule ID ↕	Actions ↕	Description ↕	Active ↕
Sample 1		Sample1	No
Sample 2		sample 2	No
Sample 3		Sample 3	Yes

Field or Control	Description
Actions	Click the Actions icon to perform related actions for the selected rule. Copy: Click to copy the selected Weighted Sort Rules properties and create a new rule. Delete: Click to delete the selected rule. You can delete all the rules except the active one.
Active	Click the toggle button to enable or disable the selected Weighted Sort Rules. You can enable only one Weighted Sort Rule at a time. If you try to active second rule when one rule is already active, a prompt will be displayed with a confirmation message to disable the already active one.
Edit	Click the Edit icon to view or modify the Weighted Sort Rules details.

Adding Weighted Sort Rules

Use Create Weighted Sort Rule page (PV_WSR_CREATE_FL) to add new rules for the weighted sort.

Navigation:

eProcurement > Administrative Tasks > Weighted Sort Rules > Add New

This example illustrates the fields and controls on the Create Weighted Sort Rule Page. You can find definitions for the fields and controls later on this page.

Create Weighted Sort Rule

Weighted Rule | Search Existing

Save

*Rule ID

*Description

Criteria

Sort By

1 row

Attribute Display Name	Attribute Type	Value	Weight (0-10)	Show in Search Row	Show in Item Details
Classification	Supplier Attribute		0		

Field or Control	Description
Rule ID	Enter a Rule ID for this Weighted Sort Rule configuration.
Description	Enter a description for this Weighted Sort Rule configuration.
Attribute Display Name	Select the attribute from the drop-down for which you want to set the rule.
Attribute Type	Displays the attribute type: Supplier Attribute, Role Controlled, Custom Attribute, or Visibility Required.
Value	Enter/select the attribute value for the selected attribute. Depending on the attribute selection, value field type may vary, such as drop-down list, Yes or No field, text field, and search box.
Show on results row	If you want to display the attribute in the search result, set the Show on results row button to Yes else set it to No. Note: For Inventory Item and Contract Item, the attributes are displayed based on Role configuration. For Preferred Supplier, by default Show on results row is set to Yes and disabled. Irrespective of rule set up, Preferred Supplier will always be displayed in the Create Requisition search results.

Field or Control	Description
Weight (0-10)	Enter the weight of the of the attribute in the scale of 0 to 10 in integer. According to the weight, search result score will get boosted. Weight value 0 indicates the row is added to show on result purpose only. Weighted Sort Rule dynamically pushes the items with the highest total weight to the top of the search results.
Add a new row	Click to add a new line.
Delete row	Click to delete the added row.
Sort By	Set the sort order of the added rows.
Search Existing	Click to view the list of already added Weighted Sort Rules.
Save	Click to save the Weighted Sort Rules configuration.

Configuring Attributes for Weighted Sort Rule

Attributes available under **Attribute Display Name** drop-down on the **Create Weighted Sort Rule** page are controlled by the setup record, *PV_WSRULE_SETUP*. These attributes are added and delivered with *EP_PV_MASTERITEMVENDOR_SD* and *EP_PV_MASTERITEM_SD* Search Definitions.

Following attributes can be configured for Weighted Sort Rule:

- Classification
- Contract Item (Incremental index is mandatory for contract Item attribute, even if RTI is enabled)
- Disabled
- Emerging Small Business
- Ethnicity
- HUBZone Program
- Inventory Item
- Item Fld C1 B
- Item Fld C1 C
- Item Fld C1 D
- Item Fld C2

- Item Fld C4
- Item Fld C6
- Item Fld C8
- Other Preference Programs
- Preferred Supplier
- SDB Program
- Size of Small Business
- Special Purchase
- Type of Contractor
- Veteran
- Veteran-Owned Small Business
- Women-Owned Business

Requester Mass Change Page

Use the Requester Mass Change page (PV_MASS_CHANGE_FL) to replace the original requester of the selected requisitions with a new requester. The new requester gets future notifications and can receive the requisitions entered by the original requester.

Navigation:

eProcurement > Administrative Tasks > Requester Mass Change

This example illustrates the fields and controls on the Requester Mass Change Page. You can find definitions for the fields and controls later on this page.

Requester Mass Change

Requester Mass Change

Original Requester

VP1

Kenneth Schumacher

New Requester

VP2

Michael Buhler

Requisition Search Criteria

*Business Unit

US001

From Date

Entered by

*Requisition Type

Standard

Requester

VP1

Through Date

Budget Status

Include Only Specific Requisition Status

☐ Approved
☐ Denied
☐ Open
☐ Line Approved
☐ Pending Approval

Search

Clear

Requisition Selection

65 rows

Process Change

☐	Requisition Name %	Business Unit/Requisition ID %	Requisition Type %	Requisition Date %	Requester %	Requisition Status %	Budget Status %	Total Amount %
☐	0000000180	US001/0000000180	Standard	01/30/2025	VP1	Approved	Not Chk'd	520.00 USD
☐	0000000179	US001/0000000179	Standard	01/30/2025	VP1	Approved	Not Chk'd	258.00 USD
☐	0000000178	US001/0000000178	Standard	01/30/2025	VP1	Approved	Not Chk'd	258.00 USD
☐	0000000177	US001/0000000177	Standard	01/30/2025	VP1	Approved	Not Chk'd	575.00 USD
☐	0000000176	US001/0000000176	Standard	01/30/2025	VP1	Approved	Not Chk'd	258.00 USD

Requester Mass Change

<i>Field or Control</i>	<i>Description</i>
Original Requester	Enter the User ID of the original requester who created the requisitions.
New Requester	Enter the User ID of the new requester. All the selected requisitions will be updated with the new requester.

Requisition Search Criteria

Use the Requisition Search Criteria to search the requisitions created by the original requester. Use the filter criteria to search the requisitions.

<i>Field or Control</i>	<i>Description</i>
Business Unit and Requester	Business Unit and Requester fields are defaulted from the original requester. You can override the Business Unit to search for a specific requisition.
From Date and Through Date	Enter the creation date or date range to search the requisitions for that period.
Entered by	Enter the User ID of the individual who created the requisition. This is usually the requester, but it can be another individual. Note: If BO is enabled for the SYSTEM_SOURCE on the Maintain Translate Values page, REQLOAD is available to select and filter the Bill Only requisitions created from the XML upload.
Budget Status	Based on the selected budget status, requisitions are displayed in the search results. Select any of the following budget statuses for the requisition: • Document In Processing • Error in Budget Check • Not Budget Checked • Provisionally Valid • Valid

Field or Control	Description
Requisition Type	The search results display requisitions based on the selected requisition type. Select any of the following requisition types: • Bill Only • Bill and Replace • Standard Note: The requisition type filter appears only if BO is enabled for the SYSTEM_SOURCE on the Maintain Translate Values page. Standard requisition type refers to all requisitions that are not BO or BR.
Include Only Specific Requisition Status	Select one or more statuses from the Include Only Specific Requisition Status drop-down menu to search the requisitions only with the selected status. If no status is selected, the search results will display the requisitions for all the statuses.
Search	Click Search to view the list of requisitions created by the original requester.
Clear	Click to clear the search filter and start a new search.

Requisition Selection

Use Requisition Selection to view the search results. You can select one or more requisitions and change the requester.

Field or Control	Description
Process Change	Select one or more requisitions using the checkbox on the left for specific items on the results grid or the select all checkbox on the top left of the grid. Then click Process Change to replace the original requester of the selected requisitions with the new requester. Note: Every time a Requester Mass Change is made to a requisition, the change is updated in the Requisition Header Comments and Attachments, which can be accessed on the My Requisitions page.

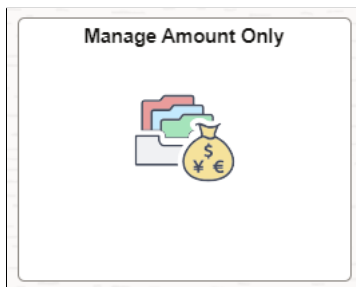
Manage Amount Only By Category Page

Use the Manage Amount Only By Category page (PV_MOB_AMT_ONL_CTG) to designate the Amount Only flag for the selected item category. Based on this designation, the Amount Only flag is defaulted on the Special Requests, Fixed Cost Service, Variable Cost Service, and Time and Materials pages.

Navigation:

eProcurement > Manage Amount Only

This example illustrates the Manage Amount Only tile.



Note: This tile is displayed only if it is configured for the Fluid Structure Content eProcurement home page. You can enable *Manage Amount Only* tile under PeopleTools, Portal, Structure and Content, Fluid Structure Content, Fluid Homepages, Edit eProcurement, Tile Content tab.

This example illustrates the fields and controls on the Manage Amount Only By Category page. You can find definitions for the fields and controls later on this page.

Manage Amount Only By Category

Search Item Categories

Save

▼ Search
Enter any information you have and click Search. Leave fields blank for a list of all values.

*SetID

Category From

Category Description

Physical Nature

Category To

Amount Only

Search Results

Select All ☐ Actions

47 rows

SetID ^{TL}	Category ^{TL}	Physical Nature ^{TL}	Description ^{TL}	Short Description ^{TL}	Amount Only ^{TL}
☐ SHARE	11111111	Goods		CATALOG MN	☐ No
☐ SHARE	12352201	Goods		CATALOG MN	☐ No
☐ SHARE	44444444	Goods		CATALOG MN	☐ No
☐ SHARE	66666666	Goods		CATALOG MN	☐ No
☐ SHARE	ACCESSORIES	Goods	Accessories	Accessory	☐ No
☐ SHARE	ALLITEMS	Goods	All Items	All Items	☐ No
☐ SHARE	AUTO	Goods	AUTOMOBILES	AUTOMOBILE	☐ No

Search

Use this section to search the list of categories based on the selected search criteria.

Field or Control	Description
SetID	Enter the SetID or select it from the Lookup page. The categories displayed in the search results are based on the selected SetID. This is a mandatory field.
Category From and Category To	Select the range of category values for which you want to default the Amount Only flag. For example, if you enter <i>Category From</i> as A and <i>Category To</i> as D, all the category names that start with the letters A, B, C, and D appear on the search results. Note: Click the Search icon to open the search Lookup page to search for a specific category. On the Lookup page, you can use advanced search criteria, including operators, to find a specific category.
Category Description	Enter the category description or partial description. Search results display the categories that contain the entered description keywords.
Physical Nature	Select the physical nature of the category: Goods, Services, or Blank. Select blank to view both the Goods and Services categories. By default, Services is selected.
Amount Only	Select to view the categories for which the Amount Only flag is designated or not.
Search	Click to get the results based on the applied criteria.
Clear	Click to clear the search criteria. Note: SetID and Physical Nature will be reset to their default values.

Search Results

Use this section to view the list of categories. Select one or more categories and designate the Amount Only flag.

Field or Control	Description
Actions	Click Actions to set the Amount Only flag to <i>Yes</i> or <i>No</i> in bulk. Note: Before performing the action, either click the Select All check box to select all the category lines or select individual lines by clicking the respective check boxes.
Category	Click this link to view Item Category Details.
Amount Only	Click to enable or disable the Amount Only flag for that category. Note: You can toggle the Amount Only button for any row in the search result without selecting the checkbox for that row.

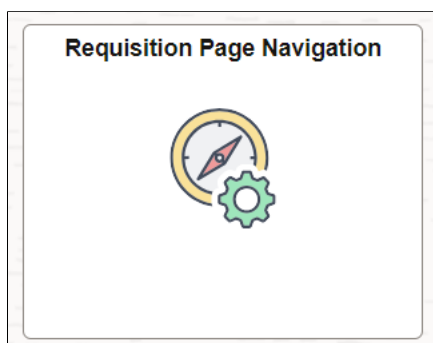
Requisition Page Navigation

Use the Requisition Page Navigation (PV_LEFTNAV_FL) to configure eProcurement requisition search bar Settings, left navigation order, and labels for the Fluid User Interface.

Navigation:

eProcurement > Administrative Tasks > Requisition Page Navigation

This example illustrates the fields and controls on the Requisition Page Navigation tile.



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

Requisition Page Navigation

Search Bar Settings

☒ Include Catalog in Search

☒ Set Initial Search Type to All

☒ Change Search Type on Navigation

Save

Navigation Panel Setup by Role

Navigation Panel Setup

Default Navigation Label ¹	Visible ¹	Initial Page ¹	Display Order ¹	Message Set Number ¹	Message Number ¹	Override Navigation Label ¹
Browse Catalogs	☒	☒	191	18040	307	Browse Catalogs
Recently Ordered	☒	☐	192	18040	214	Item History
Favorites	☒	☐	193	18036	1503	Favorites
Templates	☒	☐	194	18036	1519	Templates
Punchouts	☒	☐	195	18040	308	Punchouts
Special Requests	☒	☐	196	18036	1502	Special Requests
Fixed Cost Service	☒	☐	197	18036	1513	Fixed Cost Service
Variable Cost Service	☒	☐	198	18036	1514	Variable Cost Service
Time and Materials	☒	☐	199	18036	1515	Time and Materials

Search Bar Settings

Field or Control	Description
Include Catalog in Search	Select this checkbox to display the items in the search result from the catalog.
Set Initial Search Type to All	Select this checkbox to set the search result for all the categories. For example, if one item is available in the catalog and another is available as a special item, the search results will display all of them.
Change Search Type on Navigation	If this option is checked, the system will function as it currently does, changing the search type as the user navigates through the navigation. If this option remains unchecked, the system will set the default search type or the user's selections as the left-hand menu options remain unchanged.

Navigation Panel Setup

Configure the Create Requisition left navigation. For more information about the fields and description of the Navigation Panel Setup section, see [Setting Up eProcurement Requisition Navigation: Classic Page](#).

Navigation Panel Setup by Role

Click the *Navigation Panel Setup by Role* link on the *Requisition Page Navigation* to assign Role Names to a specific Navigation ID.

This example illustrates the fields and controls on the Navigation Panel Setup by Role page.

Cancel
Navigation Panel Setup by Role
Apply
Done

Navigation List
+
-

*Navigation ID
*Priority

Search Bar Settings

☐ Include Catalog in Search
☐ Set Initial Search Type to All
☐ Change Search Type on Navigation

Roles

1 row

*Role Name ↑↓

1
+
-

Navigation Panel Setup

1 row

Default Navigation Label	↑↓	Visible ↑↓	Initial Page	↑↓	Display Order ↑↓	Override Navigation Label	↑↓
		☐	☐				

For more information about the fields and description of Navigation Panel Setup by Role page, see [Setting Up eProcurement Requisition Navigation: Classic Page](#).

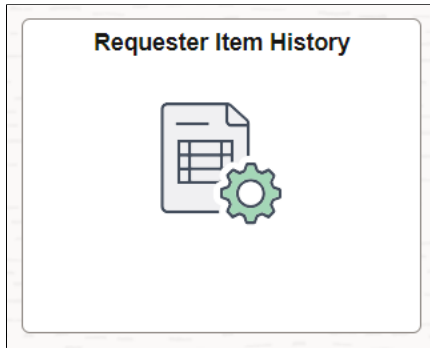
Requester Item History Page

Use the Requester Item History page (PV_RQSTR_RECENT_FL) to configure the item visibility on the Create Requisition Item History page. Depending on the Purge Requester Item History and Load Requester Item History configurations, the item list appears on the Create Requisition Item History page.

Navigation:

eProcurement > Administrative Tasks > Requester Item History

This example illustrates the fields and controls on the Requester Item History tile.



Purge Requester Item History

This page allows you to remove items from the item history based on the given parameters. If many item rows are available in the item history and no longer required, remove the items from the list based on the requirements. The Item History is created from the previously load and/or from saving the requisitions.

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

A screenshot of the "Requester Item History" page in a web browser. The page has a header with navigation icons and a search bar. Below the header, there are two tabs: "Purge Requester Item History" (selected) and "Load Requester Item History". The main content area is titled "Selection Criteria" and contains a text box with the instruction "Enter criteria to remove requester requisition history." Below this, there are three tabs: "Purge By Criteria" (selected), "Purge By Limit", and "Purge By Date". Under "Purge By Criteria", there are five input fields with search icons: "Requester", "Item SetID", "Item ID", "Supplier SetID", and "Supplier ID". At the bottom of this section is a "Purge Data" button.

Field or Control	Description
Purge By Criteria	To remove the items based on the selection, select any of the search criteria. For instance, when you select a requester, Purge Data eliminates all the items from the item history that the requester has requisitioned. You can use any of the following criteria to remove items from the item history. • Requester • Item SetID • Item ID • Supplier SetID • Supplier ID
Purge By Limit	Enter the value for Limit Rows Per Requester. Depending on the entered value, item history keeps only these many item rows from each requester and removes the rest of the item history. For instance, if you have three requesters and have set the Limit Rows Per Requester to 10, the system will display 10 items from each requester, totaling 30 items, in the item history and delete the remaining items.
Purge By Date	Enter the Purge Before date. It will delete all item history prior to that date. The item history will display the item list from that date.

Load Requester Item History

Use this page to control the display of items on the Item History page. The Load Data configuration determines the number or selection of items displayed on the Item History page.

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

Requester Item History

Purge Requester Item History

Load Requester Item History

Selection Criteria

Enter criteria to load requester requisition history from requisition lines.

Load By Requester

Load By Limit

Load By Date

Requester

Date From

Load Data

Field or Control	Description
Load By Requester	Select the Requester and Date From. The item history page displays all the previously ordered items within the date range of the entered date to today's date for the selected requester.
Load By Limit	Enter the value for <i>Load By Limit</i> . Item history displays only this many item rows from each requester, depending on the entered value. Example: If you set Limit Rows Per Requester to 10 and there are three requesters, the item history will display 10 items from each requester, totaling 30 items.
Load By Date	Enter the from date. Item history displays the item list from that date.

Note: If no data is available for the selected configuration, then there will be no item list on the Item History page. For example, if you are configuring the Load By Date and there are fewer items ordered from that selected date, these items will only be displayed, and other items will be hidden. You can adjust the criteria to display the items again according to your requirements. Load Requester Item History process deletes the item history (with the same criteria) prior loading the requester item history to prevent duplicate errors.

Maintain External Catalogs Page

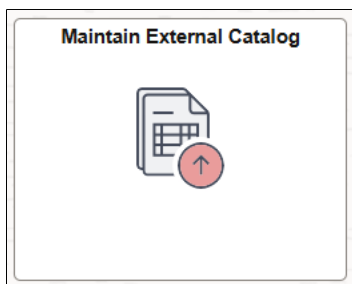
Use the Maintain External Catalogs page (PV_EXTCAT_SRCH_FL) to import supplier catalogs and review import history.

The ePro Administrator obtains catalog files from external suppliers and imports them into PeopleSoft Create Requisition. If errors occur during the import process, the ePro Administrator can review them using the import history.

Navigation:

eProcurement > Administrative Tasks > Maintain External Catalog

This example illustrates the fields and controls on the Maintain External Catalog tile.



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

Maintain External Catalogs

Search Import History | Import External Catalog Process Monitor

▼ Search

SetID CORPORATE SETID
Supplier ID
Supplier Location
Direct Connect Node

Run Status
Process Instance
Run Date From
Run Date To

Import History 7 rows

	Process Instance %1	Run Date/Time %1	SetID %1	Supplier ID %1	Supplier Location %1	Direct Connect Node %1	Run Status %1	
☐	318207	04/10/25 1:19:25AM	SHARE	0000000051	1	CDW-OBN	Warning	>
☐	318205	04/10/25 1:10:07AM	SHARE	0000000051	1	CDW-OBN	Warning	>
☐	318203	04/10/25 1:05:04AM	SHARE	0000000051	1	CDW-OBN	Warning	>
☐	318197	04/10/25 12:27:26AM	SHARE	0000000051	1	CDW-OBN	Warning	>
☐	318175	04/09/25 12:02:59AM	SHARE	0000000044	STANDARD	STAPLES	Imported	>
☐	318173	04/08/25 11:59:42PM	SHARE	0000000044	STANDARD	STAPLES	Line Error	>
☐	318155	04/08/25 1:07:42AM	SHARE	0000000051	1	CDW-OBN	Imported	>

Search

Search the catalog import history using the defined search parameters.

Field or Control	Description
SetID	Enter the SetID to access its import history.
Supplier ID and Supplier Location	Enter the external supplier ID and location linked to the catalogs imported by the ePro Administrator.
Direct Connect Node	Choose the Direct Connect Node associated with the supplier. The list displays only configured and linked Direct Connect supplier names. To link a direct connect supplier, see Setting Up PeopleSoft eProcurement for Direct Connect .
Run Status	Select an import status to filter the results accordingly.

Field or Control	Description
Process Instance	Enter the Process Instance number to search a specific import process.
Run Date From and Run Date To	Enter the start and end dates to display the import history within the selected date range.
Search	Enter the required search criteria, then click the Search button to display the import history.
Clear	Click to remove all entered search criteria values from the fields.

Import History

The Import History section displays a list of imports based on the specified search criteria, with each row representing a single import process.

This section includes import history for both processes: imports performed through the Import External Catalog option on the Maintain External Catalogs page, and those imported via the Oracle Business Network (OBN) method. Detailed description is provided later on this page.

The Import History section displays key details such as the Process Instance Number, Run Date/Time, SetID, Supplier ID, Supplier Location, Direct Connect Node associated with the supplier, and the Run Status of each import process.

Field or Control	Description
 (Select row check box)	Select the 'Select All' checkbox to mark all rows in the import history. Alternatively, you can choose specific rows by clicking their respective 'Select Row' checkboxes.
 (Delete)	Select the rows in the import history and click 'Delete' to remove them.

Field or Control	Description
Run Status	Displays the status of the import process. The <i>In Progress</i> status indicates the import process is ongoing. Upon completion, the status changes to one of the following: <i>Error</i>: The input import file could not be processed. Possible reasons include an empty input file, missing configuration, inactive Punchout Catalog, or empty Category ID or Category SetID in the Linked supplier setup. In such cases, the system cannot import the file and displays an error. <i>Imported</i>: The file has been successfully imported, and all catalog lines have been added. <i>Line Error</i>: The file was processed, but some lines contain errors. You can view these errors on the Details page. <i>Warning</i>: The file was processed, but some lines generated warnings. This message is optional. For more details on troubleshooting errors or warnings, refer to the Details page documentation later on this page.
 (Import Details)	Click to open the Details page and review process and line details. For more details refer to the Details page documentation later on this page.
 (Download to Excel Import History)	Click to export all data to an Excel sheet.
 (Find Import History)	Use the search functionality to locate a row based on the specified keyword.
 (Sort Import History)	Click to modify the sort order of the search history by Process Instance, Run Date/Time, SetID, Supplier ID, Supplier Location, Direct Connect Node, or Run Status.

Details Page

The Details page provides process details and displays error information if issues occur during the import process. You can download the input file by clicking the File Name link on this page. However, if the file is imported via the Oracle Business Network (OBN), the input file cannot be downloaded.

Navigation:

Select the **Import Details** button corresponding to a row of the Import History table on the Maintain External Catalogs page.

This example illustrates the fields and controls on the Details page with Line Error. You can find definitions for the fields and controls later on this page.

Details

Process Details

Process Instance 318173

Run Date/Time 04/08/2025 11:59:42PM

SetID SHARE

Direct Connect Node STAPLES

Supplier ID 0000000044

Total Count 10

Supplier Location STANDARD

Error Count 3

Source of File PS

File Name 02_Staples_Import_v1.csv

Line Details

3 rows

Line Number

Field Name

Input Data

Severity

Description

3	UNIT_OF_MEASURE	DZ	Error	Invalid value (18036,14834)
4	UNIT_OF_MEASURE	DZ	Error	Invalid value (18036,14834)
8	UNIT_OF_MEASURE	DZ	Error	Invalid value (18036,14834)

If the import process status is Imported, the Process Details section displays the total count of imported rows.

If the import process status is Error, it indicates that the file was not processed. In this case, line-level error information is unavailable. The ePro Administrator can download the input file, rectify the error, and attempt the import again.

If the import process status is Line Error or Warning, the ePro Administrator can access line-level error details on the Details page. These details include the affected line number, field name, input data, severity (Error or Warning), and a full error or warning description for the affected lines.

- For Line Error, the ePro Administrator can download the error input file, resolve the line errors, and re-run the import process for those lines.
- For Warning, the import process continues, as warnings are meant to notify the supplier. If necessary, the ePro Administrator can download the warning data, share it with the supplier to address the issues, and re-import the corrected file.

Importing External Catalog

Use the Import External Catalog page to import external supplier item catalogs. The ePro Administrator can import item catalogs from external suppliers integrated with OBN, as well as from punchout suppliers not integrated via OBN.

Navigation:

Click **Import External Catalog** link on the Maintain External Catalogs page.

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

Field or Control	Description
Direct Connect Node	Select the Direct Connect Node associated with the external supplier. Only configured and linked Direct Connect supplier names will appear in the list. To link a Direct Connect supplier, refer to Setting Up PeopleSoft eProcurement for Direct Connect .
Choose External Catalog File	Click the Choose External Catalog File button to upload the catalog file provided by the external supplier. For more details about External Catalog File, refer Configuring External Catalog File documentation later on this page.
Run	After selecting the Direct Connect Node and uploading the catalog file, click Run to initiate the catalog import process.
Process Monitor	Once the import process begins, click the Process Monitor link to navigate to the Process Monitor page and track the progress of the import process.
Search Import History	Click the Search Import History link to return to the Search Import History page, where you can view a detailed import history, including the import status.

Upon completion of the import process, a new row is added to the Import History table, allowing you to view the details of the latest import. The imported catalogs appear on the Fluid Create Requisition Browse Catalog search results page, based on the Direct Connect Node used for importing the items. For additional information, refer to [Create Requisition: Search Results Page](#).

Configuring External Catalog File

To import external catalog items, configure the .csv file and upload it using the 'Choose External Catalog File' option on the Import External Catalog page. Ensure the values for the following fields in the .csv file follow the specified character limits.

Field Name	Description	Character Limit
Action	Type of operation (e.g., SYNC, DEL).	NA
Description	Description of the catalog item.	254
SupplierPartID	Supplier-assigned part identifier.	50
SupplierPartAuxiliaryID	Additional supplier-assigned ID.	25
UnitOfMeasure	Unit of measurement (e.g., EA).	3
UnitPrice	Numeric value for item price (up to 5 decimals).	10
Currency	ISO currency code (e.g., USD, INR).	3
Classification	Classification code.	18
ManufacturerPartID	Part number assigned by the manufacturer.	50
ManufacturerName	Name of the manufacturer.	60
Image	File name of the product image.	30
ImageURL	URL linking to the image.	Long

This example illustrates the fields and character limit of the External Catalog File .csv template.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Action	Description	SupplierPartID	SupplierPartAuxiliaryID	UnitOfMeasure	UnitPrice	Currency	Classification	ManufacturerPartID	ManufacturerName	Image	ImageURL
2	SYNC/DEL	Char(254)	Char(50)	Char(25)	Char(3)	Num(10,5)	Char(3)	Char(18)	Char(50)	Char(60)	Char(30)	Long
3												

This example illustrates External Catalog .csv file with sample data.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Action	Description	SupplierPartID	SupplierPartAuxiliaryID	UnitOfMeasure	UnitPrice	Currency	Classification	ManufacturerPartID	ManufacturerName	Image	ImageURL
2	Sync	Product Description 1	1074103		EA	2.96	USD	26121600	3710	Name of the Manufacturer		https://oracle.com/image/Product1
3	Sync	Product Description 2	60044		EA	7.91	USD	26121600	R6G089-5	Name of the Manufacturer		https://oracle.com/image/Product2
4	Sync	Product Description 3	69278		EA	5.93	USD	26121600	F4C170	Name of the Manufacturer		https://oracle.com/image/Product3
5	Sync	Product Description 4	4705772		EA	72.26	USD	26121609	RG142PNMNM-6	Name of the Manufacturer		https://oracle.com/image/Product4
6	Sync	Product Description 5	5566070		EA	91.07	USD	39121308	TBUS-1N(B)	Name of the Manufacturer		https://oracle.com/image/Product5
7	Sync	Product Description 6	596451		EA	12.86	USD	31162802	TJ5E00-22	Name of the Manufacturer		https://oracle.com/image/Product6
8	Sync	Product Description 7	3552335		EA	56.42	USD	26111701	593554-001-ER	Name of the Manufacturer		https://oracle.com/image/Product7
9	Sync	Product Description 8	4137365		EA	328.67	USD	52161500	CONTROL 26CT	Name of the Manufacturer		https://oracle.com/image/Product8
10	Sync	Product Description 9	7047728		EA	1026.62	USD	43212100	RP4F0000012	Name of the Manufacturer		https://oracle.com/image/Product9
11	Sync	Product Description 10	8054027		EA	366.29	USD	43222640	WBE710-100NAS	Name of the Manufacturer		https://oracle.com/image/Product10
12	Sync	Product Description 11	3551112		EA	1002.86	USD	56101500	V-WMCRA	Name of the Manufacturer		https://oracle.com/image/Product11
13	Sync	Product Description 12	4205979		EA	354.41	USD	43212102	39336532	Name of the Manufacturer		https://oracle.com/image/Product12
14	Sync	Product Description 13	6394786		EA	3959.01	USD	43191500	960-001308	Name of the Manufacturer		https://oracle.com/image/Product13
15												

Note: The data shown in the above illustration is for illustrative purposes only.

Creating Requisitions Using the Fluid User Interface

This section discusses how to create requisitions, search for requisition items, and submit requisition items for approval and view requisition item details using the fluid user interface.

PeopleTools documentation regarding the PeopleSoft Fluid User Interface includes:

- *PeopleTools: Fluid User Interface Developer's Guide.*
- *PeopleTools: Applications User's Guide, Working With PeopleSoft Fluid User Interface.*

Click to watch a short video about [PeopleSoft Fluid User Interface - Getting Started](#).

Setting Up Guided Search for Create Requisition

Guided search uses Relevance Weighted Sort to dynamically push the items with the highest total weight to the top of the [Create Requisition: Search Results Page](#).

Follow these steps to set up the Guide Search for Create Requisition:

1. Use the existing EPPV6500 (ePro Fluid Administrator) permission list to access these setup pages.
2. Use the **Deploy Search Definition** page (PeopleTools > Search Framework > Administration > Deploy Search Objects) to deploy Search Definition and Search Category for the search instance **PTSF_DEFAULT**. Select the associated checkboxes for the following Search Definitions and Search Categories and click **Deploy** button.
 - a. On the **Deploy Search Definition** tab, deploy *EP_PV_EXPRESSITEMS_SD*, *EP_PV_MASTERITEMVENDOR_SD*, and *EP_PV_MASTERITEM_SD* definitions.
 - b. On the **Deploy Search Category** tab deploy the *EP_PV_MASTERITEMVENDOR_CAT* definition.

For more details about the Deploy Search Definition page, see Administering Search Definitions and Search Categories in the PeopleTools documentation (Search Technology, Administering PeopleSoft Search Framework, Administering Search Definitions and Search Categories).

3. Use the **Schedule Search Index** page (PeopleTools > Search Framework > Administration > Schedule Search Index) to run the full indexing for *EP_PV_EXPRESSITEMS_SD*, *EP_PV_MASTERITEMVENDOR_SD*, and *EP_PV_MASTERITEM_SD* definitions. This runs the connected query and populates Open Search with the data from PeopleSoft.

For more details about the Schedule Search Index page, see Working with Search Indexes in the PeopleTools documentation (Search Technology, Administering PeopleSoft Search Framework, Working with Search Indexes).

4. Use the **Manage Weighted Sort Rules** page (Employee Self Service homepage > eProcurement Tile > Administrative Tasks tile > Weighted Sort Rules tile) to create new or active existing sort rules.

For more details, see [Manage Weighted Sort Rules Page](#).

5. Use the **Assign Role Actions To Roles** page (eProcurement > Administer Procurement > Maintain System Users and Roles > Assign Role Actions to Roles > select the Transaction as Requisition > Search > select ePro Admin role) to assign and enable the *APPLY_WEIGHTED_SORT* action for the ePro Admin - Role Action Category *REQSRH*.

For more details, see [Assign Role Actions To Roles Page](#).

6. Use the **eProcurement Installation Options – Search Settings** page (eProcurement > Administer Procurement > Maintain Overall System Options > eProcurement Installation Options > Search Settings) to configure sort option. In the **Sort Option Configuration** section, enable **Relevance** sort checkbox and select **Relevance** for the **Initial Sort** drop-down.

For more details, see [Search Settings Page](#).

Setting Up Bill Only Requisition

Follow these steps to set up the Bill Only Requisition:

1. Use the following existing permission lists to access these setup pages.
 - EPPV1000 – ePro Requester
 - EPPV2000 – ePro Buyer
 - EPPV6500 – ePro Fluid Administrator
2. Use the **Assign Role Actions To Roles** page (eProcurement > Administer Procurement > Maintain System Users and Roles > Assign Role Actions to Roles > Select the Transaction as Requisition > Search > Select ePro Buyer role) to assign and enable the following role actions to the ePro Buyer role.
 - ALLOW_REQ_TYPE
 - CUSTOM_FIELDS

For more details, see [Assign Role Actions To Roles Page](#).

3. Use the **eProcurement Installation Options** page (eProcurement > Administer Procurement > Maintain Overall System Options > eProcurement Installation Options) to enable the **Bill Only** and **Bill and Replace** checkboxes in the Requisition Type group box.

For more details, see [Setting Up Installation Options for Fluid eProcurement](#).

4. Use the **Installation Options - Purchasing** page (Financials/Supply Chain > Install > Installation Options > Purchasing) to enable the **Enter Custom Fields** checkbox to display Header and Line Custom Fields for Create Requisition.

For more details about the Enter Custom Fields checkbox, see “Installation Options - Purchasing Page” (Application Fundamentals).

5. Use the **Configure Drop Zones** page (PeopleTools > Portal > Configure Drop Zones) to assign subpages. Search for the component *PV_MOB_855_CMP* and assign the following subpages to the pages and Tab Order Drop Zones.

Page Name	Tab Order Drop Zone	Subpage Name
PV_MOB_NEW_CHEKOUT	81 DZ-Top of Checkout	PV_CUSTFLD_HDR_SBF
PV_REQ_SCH_DIS_SCF	45 DZ-Top of Line Detail	PV_CUSTFLD_LIN_SBF

For more information, see the Configuring Drop Zones page in the PeopleTools documentation (Development Tools > Application Designer Developer's Guide > Creating Page Definitions > Configuring Drop Zones).

6. Use the **Requisition Type Template** page (eProcurement > Administrative Tasks > Requisition Type Template) to enable or disable custom fields for Header and Line, which will be displayed in the drop-zone area of the fluid requisition component.

Select the **Requisition Type** as **Bill Only** (or Standard or Bill and Replace) and configure the fields (Required and Visible) as per the requirement.

Once the configuration is complete, the **Requisition Type** drop-down appears on the Create Requisition page. You cannot change the Requisition Type if you have already added any items to the cart. The default requisition type is Standard.

Pages to Create Requisitions Using the Fluid User Interface

Page Name	Definition Name	Usage
<u>Requisition Defaults Page</u>	PV_MOB_855_SET_SCF	Enter default field values for new requisition lines and define requisition settings such as purchasing business unit and requester. These fields will override any setting that comes from the requester default page.
<u>Default Entry Page</u>	PV_MOBREQ_ENTRY_FL	Enter the business unit and requester ID, if it is not already defined on the User Preferences - Procurement page.
<u>Create Requisition: Browse Catalogs Page</u>	PV_MOB_CATBROWSE	Search for items.
<u>Create Requisition: Search Results Page</u>	PV_MOB_855_SRCH	Search for items based on the Search field.
<u>Item Details Page</u>	PV_MOB_855_ITEMDET	View item details.
<u>Shopping Cart Page</u>	PV_MOB_855_SR_CART	View and modify items in your cart. You can also checkout from this page.

Page Name	Definition Name	Usage
Checkout Page	PV_MOB_NEW_CHEKOUT	Verify and perform various actions to the requisition and requisition lines.
Schedule Details Page	PV_SCH_DIST_SCF	Review and modify schedule details for an item.
Accounting Tag Page	ACCTG_TAB_SEL_SCF	Add accounting tags to the requisition line.
Line Details Page	PV_SCH_DIST_SCF	Confirm requisition checkout information and edit additional details for a line, such as the buyer, supplier, and other line-specific information.
Save Confirmation Page	PV_MOB_855_CONF	View the final requisition details that have been submitted for approval.
Item History Page	PV_MOB_RECENT_ORD	View recently ordered items.
Favorites Page	PV_MOB_855_SRCHFAV	View a list of favorite items.
Templates Page	PV_MOB_TEMPLAT_FL	View and add purchasing kits, company and personal templates to your cart.
Punchouts Page	PV_MOB_855_SRCH_DC	View and access web supplier pages. See Create Requisition — Web Page .
Special Requests Page	PV_MOB_SPECIAL_REQ	Create special request items and add them to your cart.
Fixed Cost Service	PV_MOB_SVC_FC_FL	Create fixed cost items and add them to your cart. See eProcurement Services - Fixed Cost Service Page
Variable Cost Service	PV_MOB_SVC_VC_FL	Create variable cost items and add them to your cart. See eProcurement Services - Variable Cost Service Page
Time and Materials	PV_MOB_SVC_TM_FL	Create time and material items and add them to your cart. See eProcurement Services - Time and Materials Page
Order Sheets	PV_MOB_ORDSHEET_FL	To view the order sheets assigned and add order sheet items to the cart when creating requisitions.

Understanding the General Steps to Create a Requisition in Fluid

The general steps to create a requisition in Fluid are:

1. Access the Create Requisition page.
2. Select a **Requisition Type** (Standard, Bill Only, and Bill and Replace) from the drop-down.

Note: Requisition Type will not appear on the page unless at least one other requisition types (besides Standard) is chosen on the [Setting Up Installation Options for Fluid eProcurement](#). If any item is already added to the **Shopping Cart**, the Requisition Type is grayed out. Remove the item from the cart to select the Requisition Type.

3. Add items to the cart using any of these navigation options, which are located in the left pane:

Term	Definition
Browse Catalogs	Select to display catalogs in the right panel.
Item History	Select to display the Item History page in the right panel. The Item History page displays a list of recently ordered items. The number of items displayed depends on the value in the Max Rows to Retrieve for Search Results field on the Setting Up Installation Options for Fluid eProcurement .
Favorites	Select to access the Favorites page. This page displays a list of items that have been marked as a favorite. You can enter a quantity, add items to the cart, add items to templates, delete items from your favorites, and view the item description and item details. Select the Manage Favorite Groups button to access the Favorite Groups window, where you can modify the Favorite Group name, description, and sharing information.
Templates	Select to access the Templates page. This page displays purchasing kits and personal templates. For each template or kit. Use the quantity and Add to cart button to add the template or kit items to the cart. Select the Detail icon to view the items in the kit or template. Select the Manage Personal Templates button to access the Personal Templates window, where you can modify the template name, description, and sharing information.
Web Suppliers	Select to access the Web Suppliers page. This page displays web suppliers only if the web suppliers are configured and the user has access to them. Additionally, users have the option to hide the navigation for web suppliers.

Term	Definition
Special Request	Select to access the Special Requests page. This page allows you to create special requests for an item that is not in a standard catalog and has no item ID. Use the Special Requests page (PV_MOB_SPECIAL_REQ) to create any special requests to requisitions if required. Use the Special Request page to create requisitions for items or goods that are not included in the standard catalog of items in PeopleSoft eProcurement and have no item ID. This special request can be for goods or services. Users can either select the items you want to add to the cart or select the add special request tab to create special request .
Fixed Cost Service	Select to access the Fixed Cost Service page. This page allows you to create a service that is not in a company catalog and has a fixed cost.
Variable Cost Service	Select to access the Variable Cost Service page. This page allows you to create a service that is not in a company catalog and has a variable rate.
Time and Materials	Select to access the Time and Materials page. This page allows you to create time and materials that are not in a company catalog. The time charge uses a variable rate and the material charge is a fixed cost.
Order Sheets	Select to access the Order Sheets page. This page allows you to view the order sheets assigned and add order sheet items to the cart when creating requisitions.

Note: When you add the same item more than once using different navigation options (as described in the table above), the number of requisition line items in the cart increases instead of adding a new line.

4. Access the Shopping Cart page to verify items.
5. Access the Checkout page to verify requisition information, check budgets, or add documents.

Requisition Defaults Page

Use the Requisition Defaults page (PV_MOB_855_SET_SCF) to enter default field values for new requisition lines and define requisition settings such as purchasing business unit and requester.

Note: If you enable the **LAND_ON_REQ_SETTINGS_PG** role action on the Assign Role Action To Roles page, the Requisition Defaults page displays as the landing page.

Navigation:

Fluid Home > Employee Self Service > eProcurement > Create Requisition > Settings Icon > Defaults

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

The screenshot shows the 'Defaults' page for creating a requisition. It is divided into several sections: Header Defaults, Line Defaults, Shipping Defaults, and Distribution Defaults. Below these is a table for Chartfields.

Header Defaults:

- Business Unit: US001
- Requester: VP1 (Kenneth Schumacher)
- Priority: Medium
- Currency: USD
- Requisition Name: (empty)
- Card Number: (dropdown)
- Expiration Date: (empty)
- Use Procurement Card: (toggle)

Line Defaults:

- Supplier ID: (empty)
- Supplier Location: (empty)
- Buyer: (empty)
- Category: (empty)
- Unit of Measure: (empty)

Shipping Defaults:

- Ship To: US001
- Due Date: (calendar icon)
- Attention: (empty)

Distribution Defaults:

Below the defaults sections is a tabbed interface with 'Chartfields' selected. It shows a table with the following data:

Distribution Line	Percent	Location	GL Unit	Account	Operating Unit
1	0	US001	US005	600020	

Before using this page, determine the features that your users can access by linking user roles to the following eProcurement role actions:

- The CHANGEREQBU role action is required to access the Business Unit and Requester fields on this page.

Note: Fluid has a persistent cart. This means that if any items remain in the cart from the previous session, then you cannot change the requester/BU fields, even if you have the CHANGEREQBU role, until the cart is empty.

- When the new business unit is selected, the existing shopping cart items will be removed. You can add the new requisitions under new business unit.

Note: Some fields on this page may not be changeable if there are already items in the cart.

- If the ALLOW_RUSH_REQ role action is enabled for the requester, the Rush option becomes available in the Priority drop-down. If the priority is selected as Rush, the default priority for fluid requisition will be set as Rush.

If the ALLOW_RUSH_REQ role action is not enabled, then Rush is not available in the priority drop-down list. The default priority for a requisition is Medium, and you can change it to High or Low as per the requirement.

To know more about the ALLOW_RUSH_REQ role, refer [eProcurement Role Actions Page](#).

To know more about assigning roles, refer [Assign Role Actions To Roles Page](#).

Field or Control	Description
Line Defaults, Shipping Defaults, and Distribution Defaults	The values that you enter on this page can be applied to the entire requisition at the line, shipment, or distribution levels. Note: Because these values override default values on the requester, only one distribution line is allowed on this page. This is different behavior from classic and intentional. The approved method to add more than one default distribution is to use the mass change option on all lines after all are entered.
Add One Time Address	Select this button to enter the default one time shipping address. Enter the shipping details in the Shipping Address page and save the details. Note: To use this field, you must have NO_ONETIME_SHIPTO role action disabled.

Default Entry Page

Use the Default Entry page (PV_MOBREQ_ENTRY_FL) to enter the business unit and requester ID.

Navigation:

eProcurement Tile > Create Requisition Tile

This example illustrates the fields and controls on the Default Entry page.

If you have already specified the business unit and requester ID on the User Preferences – Procurement page, this page does not display.

After entering the details, you can proceed with creating requisitions. If you have already defined the business unit and requester ID on the User Preferences – Procurement page, and enabled the LAND_ON_REQ_SETTINGS_PG role action on the Assign Role Action To Roles page, the Requisition Defaults page is displayed as the landing page.

Note: If you do not have the authority to add requesters, the system displays a message, in which case you can contact the Administrator to get the authorization.

Create Requisition: Browse Catalogs Page

Use the Create Requisition: Browse Catalogs page (PV_MOB_CATBROWSE) to search for items.

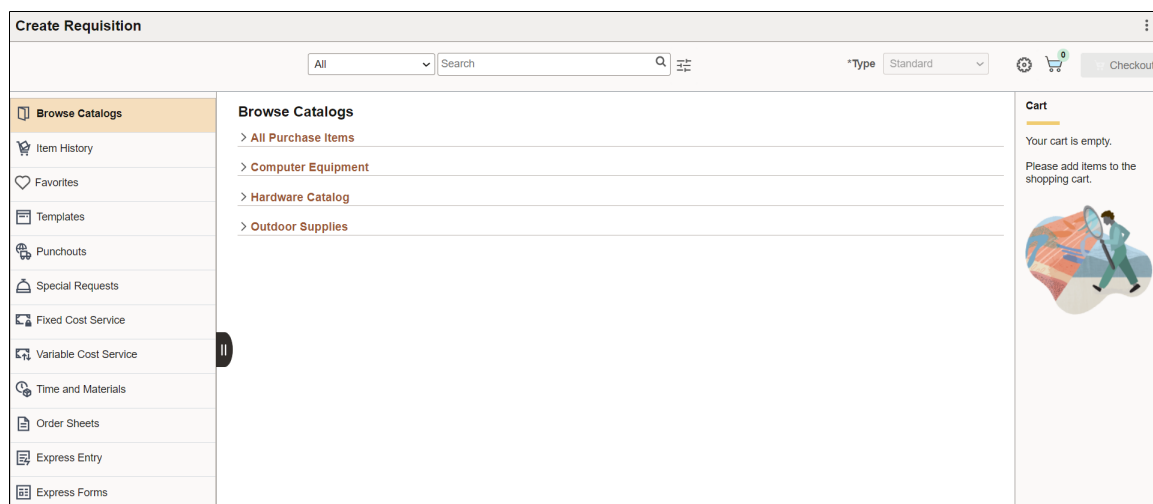
Navigation:

eProcurement Tile > Create Requisition tile

Select a **Requisition Type** (Standard, Bill Only, and Bill and Replace) from the drop-down.

Select Catalog.

This example illustrates the fields and controls on the Create Requisition - Browse Catalogs page.

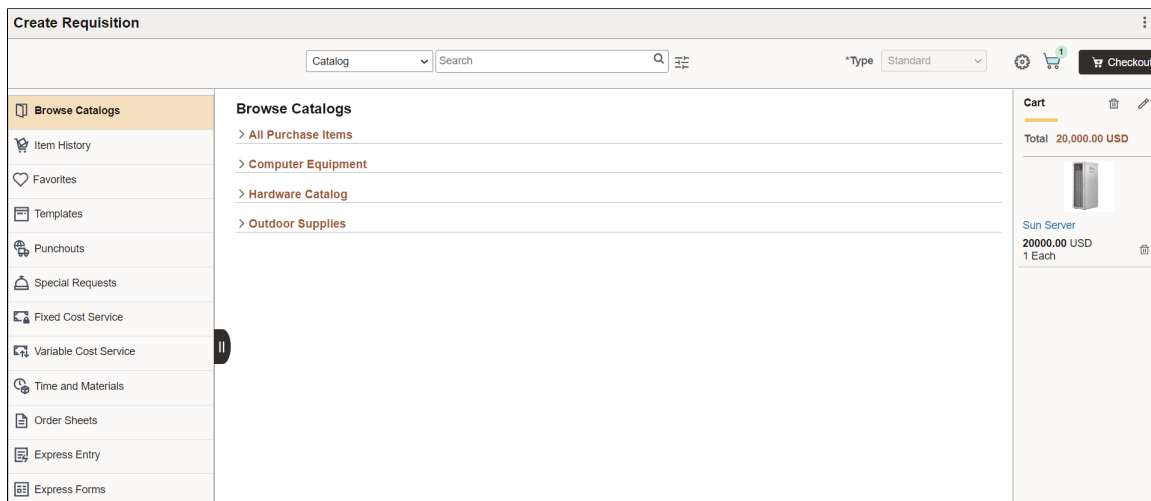


If one of the item suppliers on the Item details page is not available to be added to the cart, the Add button is hidden. The categories displayed on the Requisition page are visible or hidden, based on the Settings page. The Checkout button is enabled only when items are available in the cart.

The cart icon displays the number of items added to the cart.

The Cart displays a list of added items added, along with the item name, quantity, and price. To view item details, click on the item name.

This example illustrates the fields and controls on the Create Requisition - Cart Overview page.



To remove all of the added items from the cart, click the Clear Cart button. You can remove the items individually from the list. Click the Edit Cart button to view the Shopping Cart page, and the Checkout button to access the Checkout page. For additional details, see [Shopping Cart Page](#) and [Checkout Page](#). You can also delete items from the cart here.

To update an item already in the cart, click the item description link. You will be taken to the Item Details or special requests pages. If the item in the cart is a punchout item, you will be taken to the punchout site.

Create Requisition: Search Results Page

Use the Create Requisition: Search Results page (PV_MOB_855_SRCH) to search for items based on the Search field.

Navigation:

Select a category and enter text in the search field.

This example illustrates the fields and controls on the Create Requisition: Search Results Page.

The screenshot displays the 'Create Requisition' interface. At the top, there's a search bar with 'All' and 'desktop' selected, and a 'Type' dropdown set to 'Standard'. Below the search bar, the 'Search Results' section shows 'Items 1 through 29 of 29 Search Results for 'desktop' - In Catalog'. The results are sorted by 'Description'. Two items are listed, both priced at 258.00 USD. Each item entry includes a thumbnail image, a title link, a PO ID, and a table of supplier details (Supplier ID, Supplier Item ID, Manufacturer, Manufacturer Item ID, Lead Time Days). The left sidebar has three filter sections: 'Item Category' (Computer Equipment, Hardware, Accessories, Monitors, Desktops, Servers), 'Manufacturer Name' (No Value, Hardware, Cisco, Computer Manufacturer), and 'Supplier Name' (Haner Technologies, Midton Computer Supplies, Staples Office Supply, Western Midlands Computers, Eastern Bay Office Supplies, Infomatweak-Paris, No Value, PCS Pro). The right sidebar shows a 'Cart' icon with a message 'Your cart is empty. Please add items to the shopping cart.' and a 'Checkout' button.

You can search for an item across all categories (All) or select a specific category (Catalog, Express Forms, Favorites, Item History, Order Sheets, Punchouts, and Templates). The top of the Search Results page displays buttons for the categories or types that contain the item matching your search criteria. In this example, the default selection is the Catalog Items category, which displays the items within it. Select another category to view the results within it. The values in the drop down depend on which pages your organization has authorized for Create Requisitions. Therefore, the categories available may depend on whether or not these pages are in use.

In the right column, the search results display the PO ID, item name, and supplier name. Click the item description link to view the item details and perform Add to Favorites and Add to Templates. The links for each item, such as Inventory, Price Breaks, Contract, Stock, and Substitute Item appear as applicable.

Select any of the sort options (Description, Price - high to low, Price - low to high, and Relevance) in the *Sort By* drop-down to reorganize the search result. To configure the sort options, see [Search Settings Page](#) and [Manage Weighted Sort Rules Page](#).

Note: *Price - high to low* and *Price - low to high* sort options sort the search result based on the price value irrespective of currency type.

To make Relevance Sort Option available, APPLY_WEIGHTED_SORT Role Action should be enabled for the requester and at least one Weighted Sort Rule should be activated.

The left column of the search results displays a list of items along with Category, Manufacturer Name, Supplier Name, Category Path, and Preferred Supplier details when a catalog item is searched. To filter the items, select any category. The Category Path includes both internal and external catalogs. For imported external catalogs, it shows the Direct Connect Node names. To filter items for a specific external catalog, select the corresponding Direct Connect Node name. If an item in the search results is imported from an external catalog, icon appears before the item's name link.

For more details about the importing of external catalogs, see [Maintain External Catalogs Page](#).

This example illustrates the fields and controls on the Create Requisition: Search Results page with External Catalogs.

Create Requisition

Catalog: **share**

Search Results

[eProcurement Home](#)

CDW DC PUNCHOUT

Items 1 through 13 of 13 Search Results for 'share' - In Catalog Sort By: Relevance

Belkin serial adapter 5.93 USD

Supplier: Bike Shopper Supplier ID: SCM0000001 Supplier Item ID: 069278

Manufacturer: Belkin Cables Only Manufacturer ID: F4C170

[Contract](#) [Alternate Punchout Suppliers](#)

Emerging Small Business Veteran

Logitech Rally Bar video conferencing device 3959.01 USD

Supplier: Bike Shopper Supplier ID: SCM0000001 Supplier Item ID: 6394786

Manufacturer: Logitech VC Manufacturer ID: 960-001308

[Contract](#) [Alternate Punchout Suppliers](#)

Emerging Small Business Veteran

Cart

Your cart is empty. Please add items to the shopping cart.

If multiple suppliers are associated with the same external catalog item, the **Alternate Punchout Suppliers** link appears. Click this link to view the item from various suppliers on the Alternate Punchout Suppliers page. From this list, you can select the desired supplier and add the item to your cart.

Click the *eProcurement Home* link to navigate to the Create Requisition home page.

Use the *Advanced Catalog Search* button next to the search box to perform more complex searches by entering the required search criteria. You can save the search criteria by clicking the Save Search Criteria link. For more information about performing advanced search, see [Advanced Search — Create Requisition Page](#).

To add an item from the search result to the cart, enter the quantity and click Add to Cart. The cart displays the added number of items. While adding items to the cart, check the UOM, or you can select the UOM type using the Lookup UOM button.

To add external catalog items to the cart, select the item name or click the Add to Cart button. The system will redirect you to the external supplier page, where you can proceed to checkout. After completing the checkout process, the system will navigate back to the eProcurement Create Requisition page, as per the **Return Page After Punchout** configuration on the [Setting Up Installation Options for Fluid eProcurement](#).

Item Details Page

Use the Item Details page (PV_MOB_855_ITEMDET) to view item details.

Navigation:

Select the item name link.

This example illustrates the fields and controls on the Item Details page.

Create Requisition

Catalog desktop

*Type Standard

Item Details

[Back To Search Results](#) [Previously Requisitioned 11/30/12](#)

1337 Desktop PC Motherboard

Item Details

Item ID	A005
Category	COMPUTER_HARDWARE
Item Category	Computer Hardware
Conversion Rate	1

Supplier Information

Supplier	Star Rental Group	Manufacturer	Computer Manufacturer
Supplier Item ID		Manufacturer Item ID	A005_MFG
Unit of Measure	Each	UPN Type	
Location	1 Alternate Locations	UPN ID	
Lead Time Days	0		

258.00 USD

1 EA

Cart

Your cart is empty. Please add items to the shopping cart.

If you enable multiple images in the installation options, You can view all the images available for the item. Click the image to enlarge it.

To view the Requisition Details page of the previous requisition for this item, click the Previously Requisitioned link.

This example illustrates the fields and controls on the Item Details page - with multiple images.

Item Details

[Back To Search Results](#)

Sun Server

Item Details

Item ID	AM1003
Category	COMPUTER_EQUIPMENT
Item Category	Computer Equipment
Conversion Rate	1

Supplier Information

Supplier		Manufacturer	
Supplier Item ID		Manufacturer Item ID	
Unit of Measure	Each	UPN Type	
Location		UPN ID	
Lead Time Days	0		

20000.00 USD

1 EA

Cart

Your cart is empty. Please add items to the shopping cart.

The Item Details page displays all potential suppliers for the item if the role action VIEW_ALL_SUPPLIERS is enabled. If there is a preferred supplier, it is listed at the top. You can add the item to your favorites list or to a template. The icon changes color (fills in) if you have already added the item to your favorites or templates.

If you want to add this item to the cart, verify the quantity and unit of measure (UOM) and select the Add to Cart button.

To return to the list, select the back button. The back button takes you back to the first page where you viewed the item details.

The item details display item level and supplier level attributes. To configure which attributes to be displayed on the search result, see [Manage Weighted Sort Rules Page](#).

Shopping Cart Page

Use the Shopping Cart page (PV_MOB_855_SR_CART) to view and modify items in your cart. Select the Checkout button to check out items and save or submit requisitions.

Navigation:

eProcurement Tile > Create Requisition tile > Edit Cart

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

Create Requisition

Continue Shopping

Update Cart

Checkout

Edit Shopping Cart

1 Item(s) to buy now.

Requisition Summary

Business Unit

US001

Requisition Name

Enter a Requisition name

Requester

VP1

Currency

USD

Requisition Type

Standard

Item Description	Price	Currency	Quantity	Unit of Measure	
 1337 Desktop PC Motherboard	258.00	USD	1	EA	QDelete

Total 258.00 USD

Use this page to make changes to the requisition and submit it again. You can perform the following operations:

Users can access the Edit Requisition page, make changes to the requisition, and submit it again. These operations can be performed when editing a requisition:

- You can modify the Quantity if the requisition line is not multi-scheduled.
- You can add or remove requisition line items, and split quantities into multiple schedules and distribution lines.
- You can perform budget checking and pre-checking process.
- You can either cancel the edit operation or save changes and submit the requisition.
- After the requisition is saved or submitted, you can view the My Requisition and Create New Requisition buttons from the Confirmation page.

Field or Control	Description
My Requisitions	Select this button to return to the My Requisitions page without saving changes. This button appears on the Confirmation page.

Field or Control	Description
Continue Shopping	Select to return to the Create Requisition: Browse Catalogs Page . This button appears on the Checkout Page .
Update Cart	Select this button to save any changes and update the requisition.
Checkout	Select to access the Checkout Page .
Business Unit	Displays the name of the business unit.
Requisition Name	Enter a description of the request to help you identify this requisition as it flows through the system. If this field is left blank, the system uses the requisition ID as the name.
Requester	Displays the ID of the requester.
Currency	Displays the currency that is selected for the business unit
Requisition Type	Standard, Bill Only, and Bill and Replace Requisition Types will be display only if there are items in the cart.
Item Description	Click on this link to view the item details and images.
Quantity and Unit of Measure	Modify the quantity, unit of measure (UOM), or both. Note: The UOM can be edited only if the Allow Editing of UOM check box is selected on the Setting Up Installation Options for Fluid eProcurement .
Delete	Select to remove the item from the cart or requisition.

Checkout Page

Use the Checkout page (PV_MOB_NEW_CHEKOUT) page to verify and perform various actions to the requisition and requisition lines.

Navigation:

eProcurement Tile > Create Requisition tile > Shopping Cart > Checkout

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

Create Requisition

Continue Shopping

Save

Submit

Checkout

Order Total 1000.00 USD

▼ Requisition Summary

Business UnitUS001 US001 NEW YORK OPERATIONS

Requisition NameEnter a Requisition name

RequesterVP1 Kenneth Schumacher

CurrencyUSD

Header Comments

PriorityMedium ▼

Requisition TypeStandard

Card Number

Expiration Date

Use Procurement CardNo

Additional Fields

Custom Field 1

Custom Field 2

Custom Date

Custom Field 3

Custom Field 4

Custom Character 1

Custom Character 2

▼ Justification Comments

▼ Requisition Lines Overview

Select AllActions

1 row

Laptop

Line 1 Catalog Item
Laptop Boxware
Item ID FRA-59
Supplier Amcom Computers bv

Amount Only
☐ No

Quantity
1

Unit of Measure
EAQ

Price
1000.00

Currency
USD

Total
1000.00 USD

ScheduleDetails>

Line Comments

Delete

Order Total 1000.00 USD

<i>Field or Control</i>	<i>Description</i>
Save	Select to save the requisition and submit it later. The <u>Save Confirmation Page</u> appears.
Submit	Select to submit the requisition for approval. Select the Submit button on Checkout page to view the Save Confirmation page (PV_MOB_855_CONF). The Save Confirmation page displays the finalized requisition details that was submitted for approval.
Continue Shopping	Select to return to the <u>Create Requisition: Browse Catalogs Page</u> .

Requisition Summary

<i>Field or Control</i>	<i>Description</i>
Requisition Name	Select to enter a description of the request to help you identify this requisition as it flows through the system. If this field is left blank, the system uses the requisition ID as the name.

Field or Control	Description
Priority	Select among Rush, High, Medium, or Low to indicate the requisition's priority. Rush priority is only available if the appropriate role action is assigned to the user. Note: Selecting the Rush priority for requisitions may incur additional costs.
Header Comments	Select to access the Requisition Header Comments and Attachments page where you can add comments and upload one or more supporting documents. The system displays an error message if you try to load more than the number of attachments specified on the “Installation Options - Multiple Attachments Page” (Application Fundamentals) for Purchasing product. Use this page to enter comment text and indicate whether to send the comment to the supplier, show the comment at receipt, and show the comment at voucher. Select the comments and attachments to view the collated header comments and attachments for the requisition. You can also add multiple comments and attachments for the requisition. MULTI_COMMENTS role action controls whether the user can add multiple comments and attachments for the requisition or not.
Card Number	Select to enter a credit card number
Use Procurement Card	Select to indicate that a Procurement card is to be used.

Additional Fields

Additional Fields provides the drop zone custom fields configured on the [Requisition Type Template Page](#).

Justification Comments

Enter comments to justify the need for the requisition. These comments appear on the Requisition Approvals page.

Requisition Lines Overview

Use this section to apply the selected action to one or many lines. Click on an item name link to access the Item Description window.

Field or Control	Description
Select All	Select this check box to select all line items.
Actions	Select the check box against the required requisitions to collectively perform the following actions: • Add to Favorites: Adds the selected requisitions to the favorites list. • Add to Template(s): Adds the selected requisitions to the templates list. • Delete: Deletes the selected requisitions from the shopping cart. • Mass Change: Displays the Mass Change page, where you can change the information for the selected requisition lines. For more information, see Edit Lines/Shipping/Accounting for Selected Lines Page. Different options to apply distribution changes to the lines of your requisition are All Distribution Lines, Matching Distribution Lines, and Replace Distribution Lines. Select the Load Values From Defaults button to populate distribution line values. Populating distribution lines on the Mass Change page can also be done by manually entering accounting tags. For more information, see Submitting Requisitions. Select to access the Mass Change page (PV_MOB_855_MAS_SCF) where you can change the following: • Line Information such as Supplier ID, Supplier Location, Category, and Buyer. • Shipping Defaults such as Ship To, Comments, Due Date, and Attention • Distribution Information such as ChartField and Asset information.
Amount Only	Select <i>Yes</i> to indicate that the line is an amount only line. Note: The Amount Only toggle button is displayed for the requisition lines if the AMT_ONLY_LINES role action is assigned and enabled for the requester. The ePro administrator can provide this access.

Field or Control	Description
Quantity	Modify the quantity if required. Note: If the Amount Only toggle is set to <i>Yes</i> for any requisition line, the Quantity value is set to 1 and becomes display only for that line. You can modify the quantity if Amount Only toggle is either disabled or set to <i>No</i>.
UOM	Modify the UOM if required.
Schedule Details	Select to access the Schedule Detail page, where you can review and modify schedule details for an item. Use the Distributions section to modify ChartFields, and access Budget and Asset information. Note: Based on the setting of role actions SCHEDULE_DISPLAY, ACCOUNTING_DISPLAY and ENFORCE_RGN_SECURITY the Schedule Detail section can be visible and can be edited.
Line Comments	Select to accesses the Requisition Line Comments and Attachments page where you can add comments and upload one or more supporting documents. The system displays an error message if you try to load more than the number of attachments specified on the “Installation Options - Multiple Attachments Page” (Application Fundamentals) for Purchasing product. Use this page to enter comment text, view the collated comments, and indicate whether to send the comment to the supplier, show the comment at receipt, and show the comment at voucher. You can also add and view attachments at the line level.
Delete	Click to delete the selected line item.
 View Details icon	Select to access the Line Details Page .

Field or Control	Description
Check Budget and Pre-Check Budget	Select the Check Budget link to initiate the Budget Processor and commit funds to pre-encumbrance amount for this requisition. Select the Pre-Check Budget link to initiate the Budget Processor and check the budget without reserving funds for this requisition. Note: You can run the Check Budget and Pre-Check budget processes after saving the requisition. For information, see Submitting Requisitions.
Budget Checking Status	The Budget Checking Status is updated as <i>Valid</i> or <i>Provisionally Valid</i> after you run the Check Budget or Pre-Check Budget processes. The status is reset to <i>Not Checked</i> if you make any changes to the requisition and it needs to be budget checked again.
Add Request Document	Select to access the “Add a Document Page” (PeopleSoft Supplier Contract Management), where you can create and associate an authored document with the requisition. PeopleSoft Supplier Contract Management must be installed.

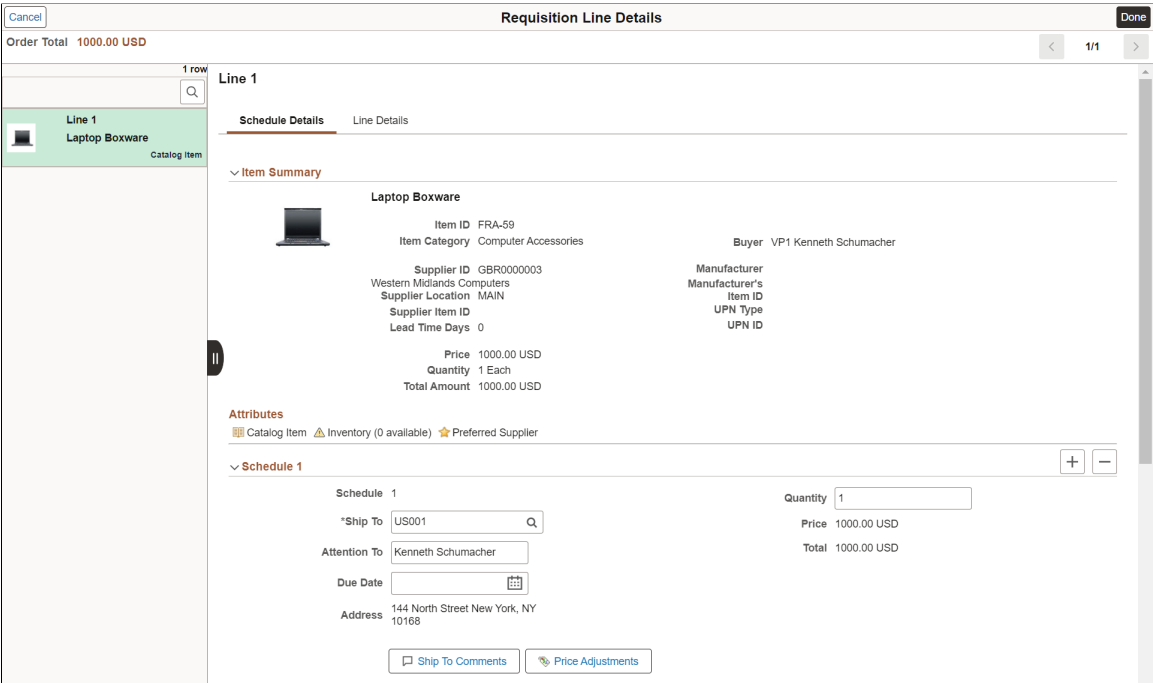
Schedule Details Page

Use the Schedule Details page (PV_SCH_DIST_SCF) to review and modify schedule details for an item.

Navigation:

eProcurement tile > Create Requisition tile > Shopping Cart > Checkout. Select the Schedule Details icon for a line. You can also access the Checkout page from the Browse Catalogs and Cart Overview pages.

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



Field or Control	Description
Cancel	Select to return to the Checkout Page .
Done	Select to save any changes and return to the Checkout Page .

You can access the schedule details for each time by clicking the item row on the left panel. Alternatively, you can use the *Next* or *Previous* icon on the top right to review each line item. You can modify the Ship To, Quantity, Due Date, and Attention To fields. You cannot edit Ship To field if *ENFORCE_RGN_SECURITY* role action is enabled.

Total is updated whenever there is quantity or price change.

Field or Control	Description
 and 	Click to add or remove schedules.

Field or Control	Description
Schedule VAT	Click the Schedule VAT button to access the VAT Information for Schedule page, where you can review value added tax (VAT) information for the schedule line. This button only appears when the Calculate VAT on Req check box for the Purchasing business unit level is selected, the purchasing business unit is a VAT environment, or the VAT_DETAILS eProcurement role action is used and the user eProcurement role is added to the user ID profile.
 Ship To Comments	Select to accesses the Requisition Ship To Comments and Attachments page where you can add comments and upload one or more supporting documents. The system displays an error message if you try to upload more than the number of attachments specified on the “Installation Options - Multiple Attachments Page” (Application Fundamentals) for Purchasing product.
 Price Adjustments	Click Price Adjustments button to view the price adjustments for the schedule.
 Custom Fields	The user definable fields are available in the Custom Fields section for Line, Schedule, and Distribution. The custom fields are informational only. Based on the drop zone subpages configuration, the custom fields are visible on this page. For more details, see Configuring Drop Zone Subpages.
 Maintenance WO	Click Maintenance WO button to integrate a work order to a requisition schedule. A requester with the <i>CANLINK_WO</i> role action enabled can view this option. Note: For fluid requisitions, you can peg only non-inventory items to work orders. For more information about work order integration, see Integrating Requisitions with Work Orders.
Distributions group box	You can view and override the accounting information.

Use the Distributions section to access Accounting Tag information, modify ChartFields, and access Budget and Asset information.

This example illustrates the fields and controls on the Schedule Detail - Distributions page

Note: ChartField Display Templates are used to extend ChartField configuration to control the display of individual ChartFields on PeopleSoft Fluid components. It displays ChartFields in a consistent manner on PeopleSoft Fluid transaction pages across PeopleSoft products. For eProcurement mobile requisition the default ChartField display template *ALLCFS* is used for all users, a permission list, or user ID. Use the “Assign CF Display Templates Page” (Application Fundamentals) to assign template to the mobile requisition component.

Field or Control	Description
Accounting Tag	Select to access the Accounting Tag Page. Note: This link appears only if Accounting Tag check box is selected for eProcurement on the Accounting Tag Registration page. See “Setting Up Accounting Tags” (Application Fundamentals)
	Click the Distribution VAT icon to access the VAT Information for Distribution page, where you can review value added tax (VAT) information for the distribution line. This button only appears when the Calculate VAT on Req check box for Purchasing business unit is selected, the purchasing business unit is using a VAT environment, or the VAT_DETAILS eProcurement role action is used.

Accounting Tag Page

Use the Accounting Tag page (ACCTG_TAB_SEL_SCF) to add accounting tags to the requisition line.

Navigation:

eProcurement tile > Create Requisition tile > Shopping Cart > Checkout > Schedule Details icon > Accounting Tag

By adding accounting tags the system automatically prorates the amount and quantity of an accounting line according to the proration percentages defined on the Accounting Tag. Accounting tags are used to populate ChartFields on the transaction distribution lines as well.

For additional information about accounting tags, see “Setting Up Accounting Tags” (Application Fundamentals)

Line Details Page

Use the Line Details page (PV_SCH_DIST_SCF) to confirm requisition checkout information and edit additional details for a line, such as the buyer, supplier, and other line-specific information.

Navigation:

eProcurement tile > Create Requisition tile > Shopping Cart > Checkout. Select the View Details icon for a line.

This example illustrates the fields and controls on the Line Details Page (1 of 4). You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Requisition Line Details' page for Line 1, 'Laptop Boxware'. The page has a 'Cancel' button at the top left and a 'Done' button at the top right. The 'Order Total' is 1000.00 USD. The page is divided into two tabs: 'Schedule Details' and 'Line Details'. The 'Line Details' tab is active. The 'Item Summary' section shows the item name 'Laptop Boxware', a laptop icon, and details: Item ID FRA-59, Item Category Computer Accessories, Original Substituted Item, Long Description Laptop Boxware, Price 1000.00 USD, Quantity 1 Each, and Total Amount 1000.00 USD. The 'Physical Nature' is set to 'Goods'. The 'Buyer' is 'VP1'. There are buttons for 'Buyer Information' and 'Show Configurator'. The 'Attributes' section shows 'Catalog Item' and 'Inventory (0 available)'. There are 'Expand All' and 'Collapse All' buttons at the bottom.

This example illustrates the fields and controls on the Line Details Page (2 of 4). You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Additional Line Fields' section. It contains several input fields: Custom Field 1, Custom Field 2, Custom Field 3, Custom Character 1, Custom Field 4, Custom Character 2, and Custom Date. There are 'Expand All' and 'Collapse All' buttons at the bottom.

This example illustrates the fields and controls on the Line Details Page (3 of 4). You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Item Additional Information' section. It contains several input fields and checkboxes: Device Tracking (No), Stockless Item (No), RFQ Required (No), Inspection Required (No), Amount Only (No), Zero Price Indicator (No), Use Contract if Available (Yes), Contract ID, Contract Version, Contract Line, Category Line, Supplier ID (NLD0000002), Supplier Location (MAIN), Supplier Item ID, Supplier Name (Amcom Computers bv), Supplier's Catalog Number, and Item Supplier Priority (2). There are 'Expand All' and 'Collapse All' buttons at the bottom.

This example illustrates the fields and controls on the Line Details Page (4 of 4). You can find definitions for the fields and controls later on this page.

The screenshot displays a form with three main sections:

- Manufacturer Information:** Includes fields for Manufacturer ID, Manufacturer's Item ID, UPN Type, and UPN ID, each with a search icon. A Manufacturer label is also present.
- Procurement Group Information:** Includes a Procurement Group ID field with a search icon, a Unit Allocation Qty field, and a Primary Unit checkbox (set to No).
- Sourcing Controls:** Includes checkboxes for Consolidate with other Reqs, Calculate Price, and Override Suggested Supplier, all set to Yes. An Inventory Source Flag checkbox is also set to Yes.

If you have substitute items defined for the original item, the Substitute icon appears next to the *Original Substituted Item* field. Click the Substitute icon to access the Substitute Items window to override any auto-substituted item. Only those items that are available for *Manual Substitution* and *Automatic and Manual Substitution* types are listed for your selection.

Item Summary

Field or Control	Description
Physical Nature	Indicates whether the requisition is for goods or services.
Buyer	Select the buyer name.
Buyer Information	Select to access the Buyer Telephone Information window, which displays the buyers name, telephone, and fax number.
Show Configurator	Select to access the Item Configuration Information window, where you can select an Inventory Unit and Configuration Code.
Attributes	Item level and supplier level attributes are displayed based on weighted sort rule setup. To configure Weighted Sort Rules, see Manage Weighted Sort Rules Page.

Additional Line Fields

Additional Line Fields provides the drop zone custom fields configured on the [Requisition Type Template Page](#).

Item Additional Information

<i>Field or Control</i>	<i>Description</i>
Device Tracking	Displays whether a receipt line is device tracked. This field is available for items that are description-only. See “Using Device Tracking” (PeopleSoft Managing Items)
Stockless Item, RFQ Required, Inspection Required	See “Purchasing Attributes - Purchasing Controls Page” (PeopleSoft Purchasing)
Amount Only	Select Yes to indicate that the line is an amount only line. When you select Yes, these actions occur on the requisition: • The requisition and schedule line quantity are set to 1 and become unavailable for entry. • The Price field on the line is available for entry. The price amount that you enter becomes the schedule price and amount. • The Distribute By option on the Schedule-Distribution page defaults to <i>Amt.</i> • In the Line Details window, the Inspection Required, Consolidate with other Reqs, and Inventory Source Flag toggle buttons are disabled. • The system prevents you from adding another schedule line by removing the Add Row button on the Schedule page. See also, “Common Elements Used in the Sourcing Workbench” (PeopleSoft Purchasing) Note: The Amount Only toggle button is always visible and available on the Requisition Line Details page.
Zero Price Indicator	See “Common Elements Used in the Sourcing Workbench” (PeopleSoft Purchasing).

Contract Information

Click the Contract Search icon to access the Contract Search page, where you can perform advanced searches for contracts to be applied to the requisition line.

If you replace an existing contract or select another, the Supplier Information section reflects the modifications accordingly. You can confirm whether you want to proceed with changing the supplier when the message displays.

See [Line Details Page](#) for more information.

Supplier Information

Field or Control	Description
Supplier ID	Displays the ID of the supplier that supply this item.
Supplier Location	Displays the location of the supplier. The default is based on the value that is defined for the supplier.
Supplier Item ID	Displays the ID that the supplier uses to identify this item on the Item Supplier page.
Supplier's Catalog Number	Displays the Catalog Number that the supplier assigned for the item.
Item Supplier Priority	Indicates the supplier priority selected for the item. The value appears by default as a medium priority, but can be changed by the user. The updated priority appears on the Requisition Header.
Suggest New Supplier	Select this link to access the Suggested Supplier page (PV_MB_SUG_VNDR_SEC) where you can enter supplier name, address, and phone information.

Manufacturer Information

The Manufacturer information group box displays all information pertaining to the manufacturer.

Field or Control	Description
Manufacturer ID	Identifies the manufacturer of the item. This value is supplied from the Supplier's Manufacturer Info page.
Manufacturer's Item ID	Displays the identifier that the manufacturer uses for this item when the suggested supplier supplies the item. This value appears from the Supplier's Manufacturer Info page.
UPN Type	Select applicable UPN Type Code.

Field or Control	Description
UPN ID	Select applicable universal product number that is defined by a unique combination of item ID, manufacturer ID, manufacturer item ID, and Unit of Measure. On selecting the UPN ID, the item line information associated with the selected UPN ID will be populated.

See [Line Details Page](#) for more information.

Procurement Group Information

For additional information about Procurement Groups, see “Understanding Procurement Groups in PeopleSoft” (PeopleSoft Purchasing)

Field or Control	Description
Procurement Group ID	Select a Procurement Group ID to be displayed on receipt lines. Procurement groups are defined using the “Procurement Groups Page ” (PeopleSoft Purchasing).
Primary Unit	Select Yes or No to indicate that this is the primary unit for the Procurement Group.
Unit Allocation Qty	Enter a quantity that identifies the quantity to allocate per asset for the Procurement Group.

Sourcing Controls

Use this section to alter sourcing options for the selected requisition line. This section is controlled by role, therefore some options are display only.

Field or Control	Description
Consolidate with other Reqs (consolidate with other requisitions)	Select Yes to consolidate multiple requisitions for the same supplier into one purchase order. This is defined at requester setup.
Calculate Price	Select Yes to have the sourcing process recalculate the item price when this requisition line enters the sourcing stage.

Field or Control	Description
Override Suggested Supplier	Select Yes to enable the sourcing process to override the suggested supplier. This is determined for purchasing order sourcing.
Inventory Source Flag	Displays whether eligible requisition items are sourced from PeopleSoft Inventory, which is determined in user preferences. Note: If the substitute item is valid for a particular supplier, then <i>Inventory Source Flag</i> and <i>Override Suggested Supplier</i> are set to <i>No</i>. If the substitute item is valid for all suppliers, it can be defined at the item definition level and the <i>Override Suggested Supplier</i> will be <i>Yes</i>.
Auto Item Substitution	Select Yes to indicate that item substitutions can be determined by the system. This is determined by Purchasing business uni.

Save Confirmation Page

Use the Save Confirmation page (PV_MOB_855_CONF) to view the final requisition details that have been submitted for approval.

Navigation:

eProcurement Tile > Create Requisition tile > Checkout > Submit

The message disappears after two seconds.

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

Checkout Confirmation

[Print Preview](#)

Requisition Details

Business Unit	US001	Total Lines	4
Requisition ID	0000000176	Total Amount	6218.00 USD
Requisition Name	0000000176	Budget Checked Status	⚠️ Not Checked
Last Modified Date	09/07/2022 11:37:10PM		
Requisition Type	Standard	Check Budget	Pre-Check Budget
Status	🟢 Approved		

Next Steps

- [Edit this Requisition](#)
Modify this requisition
- [My Requisitions](#)
Go to existing requisitions
- [Create Requisition](#)
Create another requisition

Field or Control	Description
Print Preview	Click to print the requisition with distribution details. If the requisition priority is Rush, ***RUSH ORDERS*** text appears at the top of the print preview to identify the rush requisition.
View Approval Chain	Select to view the list of approvers for the requisition.
Budget Checked Status	Displays the following statuses based on the Check Budget and Pre-Check Budget processes: <i>Not Checked</i>: Indicates that the Check Budget and Pre-Check Budget processes are pending. <i>Provisionally Valid</i>: Indicates that the Pre-Check Budget process was successful. <i>Valid</i>: Indicates that the Check Budget process was successful. <i>Error</i>: Indicates that the budget checking processes failed. Click the link to navigate to the Review KK Requisition page to view the line information and view the exception.

Field or Control	Description
Check Budget	If the Check Budget process is successful, the Budget Checking Status changes to the <i>Valid</i> link. The Pre-Encumbrance Balance is also displayed as a link. Click the <i>Valid</i> link to view the Commitment Control window. In the window, click the <i>Go To Activity Log</i> link to navigate to the Commitment Control Activity Log page.
Pre-Check Budget	If the process is successful, click the <i>Provisionally Valid</i> link to view the Commitment Control details in the Commit Control window. The Pre-Budget link becomes disabled after running the process.
Pre-Encumbrance Balance	The Pre-Encumbrance balance is displayed as a link. Clicking this link opens the Accounting Entries page. Note: The pre-encumbrance value will also be displayed on the Edit Requisition page next to Order Totals and on the Budget Information tab of the Distribution page. You can click these links to view the details on the Accounting Entries page.
Edit this Requisition	Select to edit the requisition.
My Requisitions	Select to go to the requisition page, where you view and work with all your requisitions.
Create Requisition	Select to create new requisition directly from this page.

You can navigate to other pages from this page via the Action menu. See [Approving Requisitions Using PeopleSoft Fluid User Interface](#).

Item History Page

Use Item History page (PV_MOB_RECENT_ORD) to view the list of recently ordered items.

The number of items displayed depends on the value in the Max Rows to Retrieve for Search Results field on the [Setting Up Installation Options for Fluid eProcurement](#).

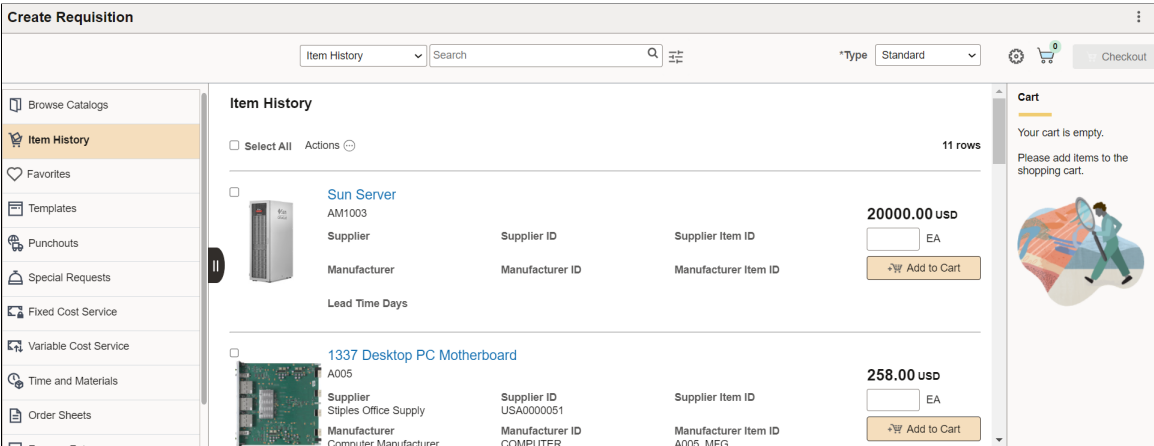
Items that appear on the Item History page are based on user recently ordered items, but are limited by any work done using the Purge Requester Item History and Load Requester Item History configurations on the [Requester Item History Page](#) (Not all item history may be available).

Navigation:

eProcurement tile > Create Requisition tile

On the ePro Homepage, select Item History from the left menu.

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



This page displays the list of recently ordered items along with their Item Description, Supplier Name, Manufacturer Name, Price, Currency, and UOM. Click the item name to view the [Item Details Page](#).

Field or Control	Description
Quantity	Enter the number of items to be added to the cart.
 (Add to cart)	Click to add items with the defined quantity to the cart. Note: You can select multiple items using the checkbox on the left for specific items on the grid, or use the select all checkbox on the top left of the grid for all items. To add multiple items to the cart, click the Actions button. The Add to Cart button is not available for inactive items.
 (Actions)	Select items using the checkbox on the left for specific items on the grid or the select all checkbox on the top left of the grid, and click Actions to add items to the cart, favorites, or templates.

Favorites Page

Use the Favorites page (PV_MOB_855_SRCHFV) to add items to your Favorites list and group them using collections.

You can manage frequently ordered items and groups of items in a single location by creating favorites. You have the ability to compile a list of frequently ordered items and arrange them into favorite collections. You can use the list to add items to a requisition without searching the item catalog.

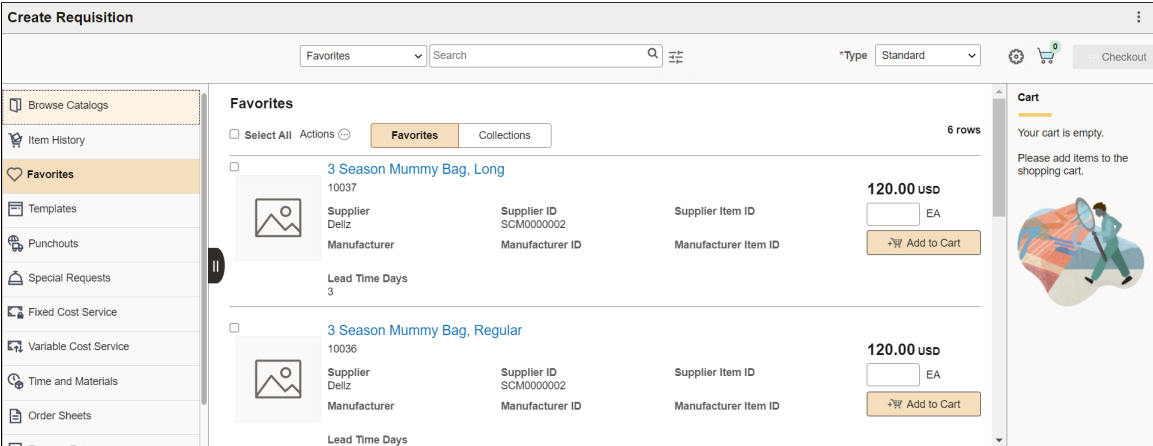
Favorite Items are private, accessible only to you, and are stored under the Requester ID. The list can be built from items in PeopleSoft eProcurement or PeopleSoft Services Procurement.

Navigation:

eProcurement tile > Create Requisition tile

On the ePro Homepage, select Favorites from the left menu.

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



Click the item name to view the [Item Details Page](#).

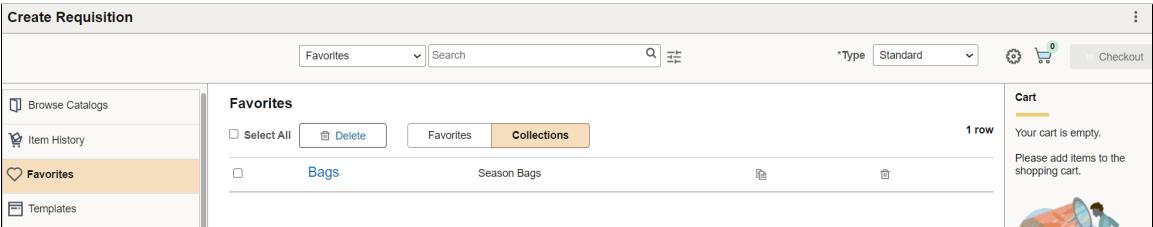
Select items using the checkbox on the left for specific items on the grid or the select all checkbox on the top left of the grid, and click Actions to add items to the cart, collections, or templates. Actions can also be used to remove items from the favorites list.

Note: The Add to Cart button is not available for inactive items.

Collections

Select the items from the Favorites list, click Actions, and then Add to Collections. The Add to Collections page appears to allow you to create a new collection or add items to an existing one. To create a new collection, you need to enter the collection name and the collection description.

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



Click the collections name to view the list of item and add to the cart.

Field or Control	Description
 (Delete)	Select all or one or more collections, and click the delete button at the top to remove them from the list. You can also remove individual collections by clicking the corresponding delete button.
 (Copy)	Click to copy the collection and create a new one from it.

For more information on Favorites, see [Create Requisition — Favorites Page](#).

Templates Page

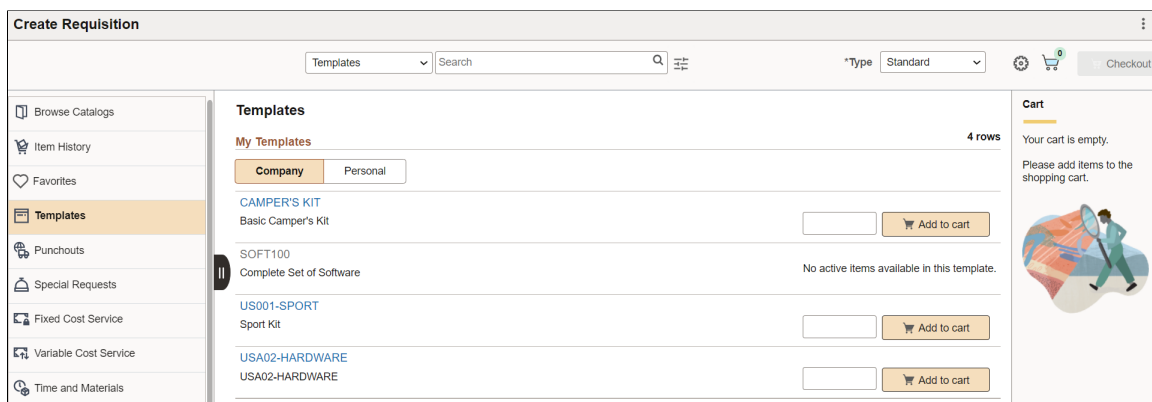
Use the Templates page (PV_MOB_TEMPLAT_FL) to add purchasing kits, company, and personal templates to your cart.

Navigation:

eProcurement Tile > Create Requisition tile

On the ePro Homepage, select Templates from the left menu.

This example illustrates the fields and controls on the Templates page.



Click on any template description from the list to view the template details.

Personal Templates

While adding items to the template, you can create a personal template or add the items to an existing one. To view a personal template or remove existing templates, click the Personal Templates button.

This example illustrates the fields and controls on the Personal Templates page.

Field or Control	Description
Add to Cart	Click the Add to Cart button To add the template items to the cart. Items are added as per the predefined quantities in the template.
 (Edit)	Click the edit button to remove items from the selected personal templates or update the item quantity.
 (delete)	Select all, or select one or more personal templates, and click the delete button at the top to remove the templates from the list. You can also remove individual templates by clicking the corresponding delete button.
 (copy)	Click to copy the template and create a new one from it.

Template Details

This example illustrates the fields and controls on the Template Detail page.

Note: If any item status is inactive in the template and you add the template items to the cart, a confirmation message appears indicating whether you want to add other items to the cart excluding the inactive one.

For more information on Templates, see [Create Requisition — Templates Page](#).

Special Requests Page

Use the Special Requests page (PV_MOB_SPECIAL_REQ) to order items that are not found in the item catalog.

Navigation:

eProcurement Tile > Create Requisition

On the ePro Homepage, select Special Requests from the left menu.

This example illustrates the fields and controls on the Special Requests page (1 of 2).

The screenshot shows the 'Create Requisition' page with a left sidebar containing navigation links: Browse Catalogs, Item History, Favorites, Templates, Punchouts, **Special Requests**, and Fixed Cost Service. The main content area is titled 'Special Requests' and contains the 'Item Information' section. This section includes input fields for: *Item Description (with a 254 characters remaining indicator), *Price, *Quantity, *Category, Due Date, *Currency Code (set to USD), and *Unit of Measure. There is also a 'Request New Item' checkbox. A top navigation bar includes a search bar, a 'Type' dropdown (set to Standard), and a 'Checkout' button. A right sidebar shows a 'Cart' section with the message 'Your cart is empty. Please add items to the shopping cart.' and an illustration of a person with a magnifying glass.

This example illustrates the fields and controls on the Special Requests page (2 of 2).

The screenshot shows the second part of the 'Create Requisition' page. The left sidebar now includes: **Special Requests**, Fixed Cost Service, Variable Cost Service, Time and Materials, Order Sheets, Express Entry, and Express Forms. The main content area contains the 'Supplier Information' section with input fields for Supplier ID, Supplier Location, and Supplier Item ID. Below this is the 'Manufacturer Information' section with input fields for Manufacturer ID and Manufacturer's Item ID. A 'Comment' section includes a 'Comment Text' field and three checkboxes: 'Send Comment to Supplier', 'Show Comment on Receipt', and 'Show Comment on Voucher'. At the bottom left is an 'Add to cart' button. The right sidebar continues the 'Cart' section with the same empty cart message and illustration.

Specify the required requisition details and click the *Add* button to add the special item to the cart.

Note: The Amount Only toggle button is displayed only if the requester has the AMT_ONLY_SPECIAL_REQ role action assigned and enabled. By default, this button is set to No.

For more information on special requests, see [Requesting Special Items](#).

Integrating Requisitions with Work Orders

While creating requisitions, requesters can integrate requisitions directly to a work order as needed. A requester with the *CANLINK_WO* role action can view the Peg Work Order option on the Schedule Details page.

Note: For fluid requisitions, PeopleSoft Update Image 42 supports work order integration of non-inventory and special request items only.

Navigation

eProcurement Tile > Create Requisition

Add items to the shopping cart and proceed to checkout.

Select the **Schedule Details** button on a requisition line and click the **Maintenance WO** button.

This example illustrates the fields and controls on the Maintenance Work Order window.

Schedule Detail

Line 1 - 17 inch LCD Display Computer Monitor; Analog/Digital,

Cancel

Maintenance Work Order

Done

Requisition ID NEXT

Item DSS_MONITOR_17

Line 1

Status Active

Schedule 1

Description

17 inch LCD Display Computer Monitor; Analog/Digital,

Maintenance Work Order

Work Order Business Unit

Work Order ID

Task Number

Resource Type

Resource Line

Clear

Field or Control	Description
Work Order Business Unit	Select a business unit that contains the work order that you plan to integrate.
Work Order ID	Select the required work order ID.

Field or Control	Description
Task Number	Select the work order task number generated by the system.
Resource Type	Available resource types are <i>Labor</i> , <i>Material</i> , and <i>Tools</i> . The Resource line reflects any changes to the resource type.
Resource Line	If the work order does not have any item information, the resource line does not display any value. You can either add a value or leave it blank. If you submit a requisition without adding a resource line, the line number is automatically added. If line numbers already exist and you proceed with submitting a requisition with a blank resource line field, the resource line number will be automatically incremented by one. Whereas, if you enter a resource line number, the same number is retained upon the requisition submission.
Clear	Select to remove all the field values at the same time.

After entering the details, click the **Done** button and go back to the Checkout page and submit the requisition. The Edit Requisition page will display the details entered.

Creating Requisitions Using Order Sheets

On login, a requester can click the Order Sheets menu on the Create Requisition page to view the order sheets assigned to them by the eProcurement administrator. Order sheets within the same Set ID that the requester is authorized to access are listed. To view authorized order sheets for a different Set ID, change the default Set ID on the Requisition Defaults page. The requester can go through the items defined on the order sheet and create requisitions.

Note: Access to order sheets is managed by eProcurement administrators. Contact the administrator if you wish to see the order sheets on the Create Requisitions page.

This topic discusses how to create requisitions using order sheets.

Related Links

[Requisition Page Navigation](#)

Pages Used to Create Requisitions Using Order Sheets

Page Name	Definition Name	Usage
Order Sheets Page	PV_MOB_ORDSHEET_FL	To view the order sheets assigned to a requester and create requisitions using them.

Page Name	Definition Name	Usage
<u>Order Sheet Details Page</u>	PV_MOB_ORDDTL_FL	To view the details of order sheets and add the order sheet items to the cart.

Order Sheets Page

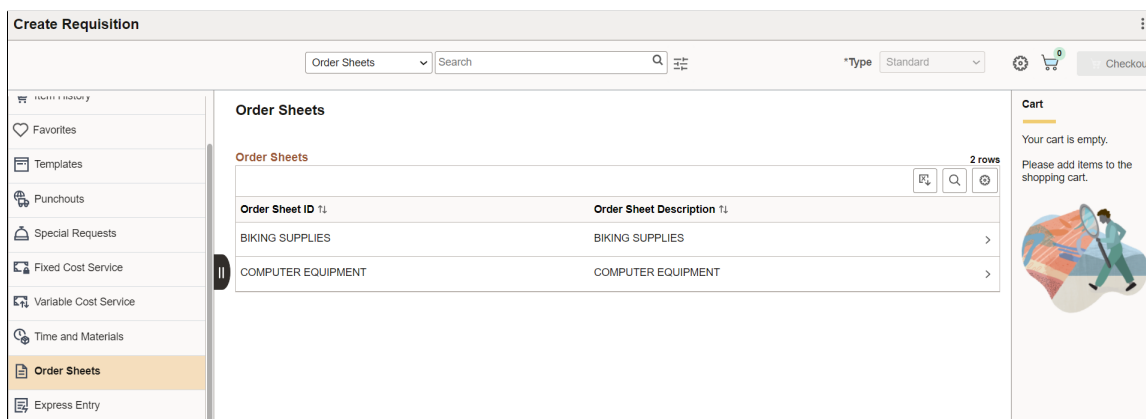
Use the Order Sheets page (PV_MOB_ORDSHEET_FL) to view the order sheets assigned and create requisitions using them. The page displays all the order sheets that the requester has been authorized to within the default business unit. If there are no order sheets assigned to the requester, the order sheet window displays the *No active order sheet available* message. Order sheets with the *Open* or *Inactive* status will not be displayed on the page.

Navigation:

eProcurement > Create Requisition.

Select Order Sheets.

This example illustrates the fields and controls on the Order Sheets Page.



Select an order sheet to view its details.

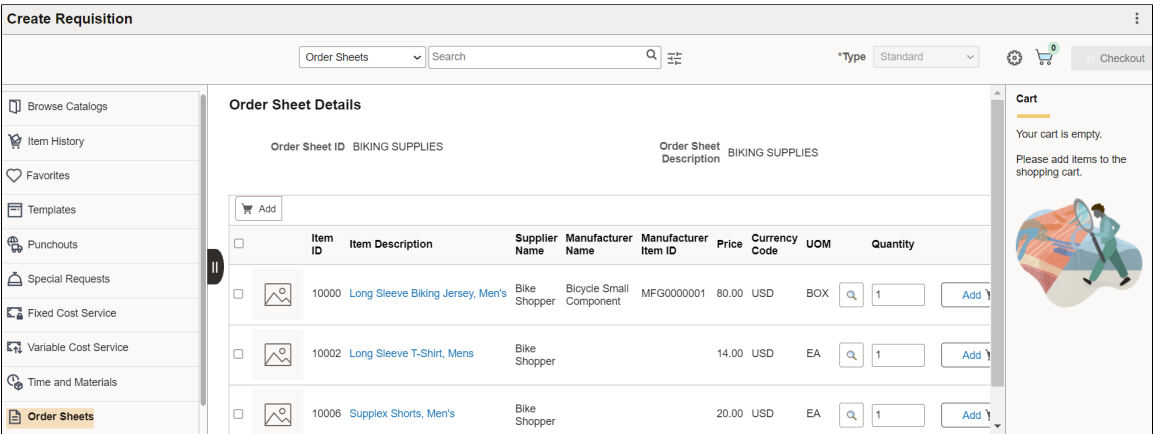
Order Sheet Details Page

Use the Order Sheet Details page (PV_MOB_ORDDTL_FL) to view the list of active order sheet items and add them to the cart.

Navigation:

On the Order Sheet page, select the Details icon of an order sheet.

This example illustrates the fields and controls on the Order Sheet Details Page.



The details displayed include the *Item ID*, *Item Description*, *Supplier Name*, *Manufacturer Name*, *Manufacturer Item ID*, *Price*, *Currency Code*, *UOM*, and *Quantity*. You can modify the quantity before adding the item to the cart. Select the required lines or all lines to add to the cart. Items are added to the cart with the latest price, contracts associated, other items defaults, and order sheet distributions. You can modify the distribution lines, if the *ORDER_SHEET_DIST_OPTIONS* role action is enabled.

The items with *Error* status cannot be added to the cart. The Add button is disabled for such items. When you try to add them to the cart by clicking the select check box, a message displays indicating that the order sheet item cannot be added.

After adding the required items to the cart, you can navigate to the Shopping Cart page, and proceed with checking out the items.

Note: The Shopping Cart page lists order sheet items as separate lines and are not accumulated. This is because the UOM and distribution information might be completely different for order sheet items. If you wish to change an item quantity after it is added to the cart, you must modify it on the Shopping Cart page.

For more information on Shopping Cart and Check Out pages, see [Shopping Cart Page](#) and [Checkout Page](#).

Creating Requisitions Using Express Entry

On login, requesters can click the Express Entry menu on the Create Requisition page to quickly start creating requisitions for catalog and special request items. This feature lets you directly create requisitions for the items if you know the details such as Item ID, Supplier, and UOM, rather than searching for them.

This topic discusses how to create requisitions using the Express Entry feature.

Page Used to Create Requisitions Using Express Entry

Page Name	Definition Name	Usage
<u>Express Entry Page</u>	PV_MOB_EXPRESS_FL	To quickly create requisitions for catalog and special request items by entering the details directly rather than searching for items.

Express Entry Page

Use the Express Entry page (PV_MOB_EXPRESS_FL) to quickly create requisitions for catalog and special request items by entering the details directly rather than searching for them.

Note: The Express Entry menu is displayed only if you have selected the *Express Entry- Visible* check box on the eProcurement Requisition Navigation page, and the EXPRESSREQ_ENTRY role action is enabled on the Assign Role Actions To Roles page.

Navigation

eProcurement > Create Requisition.

Select a **Requisition Type** (Standard, Bill Only, and Bill and Replace) from the drop-down.

Note: If any item is already added to the **Shopping Cart**, the Requisition Type is grayed out. Remove the item from the cart to select the Requisition Type.

To configure Requisition Type, see [Setting Up Installation Options for Fluid eProcurement](#).

Select Express Entry.

This example illustrates the fields and controls on the Express Entry Page.

The screenshot displays the 'Create Requisition' interface. On the left, a sidebar lists various navigation options, with 'Express Entry' currently selected. The main workspace is divided into two sections. The top section, titled 'Express Entry', features a tabbed interface with 'Details' as the active tab. Below the tabs is a table with five columns: 'Item ID', 'Item Description', 'Quantity', 'UOM', and 'Category'. Each column has a corresponding input field with a search icon. An 'Add' button is positioned below the table. The right sidebar contains a 'Cart' section, which indicates that the cart is empty and prompts the user to add items. An illustration of a person with a shopping cart is also present in this section.

Field or Control	Description
Details tab	Displays the <i>Item ID</i>, <i>Item Description</i>, <i>Quantity</i>, <i>UOM</i>, <i>Category</i>, <i>Price</i>, <i>Merchandise Amount</i>, and <i>Currency</i> fields. As you enter or select an item ID, the other details such as Item Description, Quantity, and UOM fields populates the default values defined. You can modify the quantity and UOM fields if required. Note: If a category is configured as Amount Only, upon selecting that category for the Express Entry line, the quantity value is set to 1 and becomes display only for that line. For Amount Only lines, the Item ID field is also not available.
Supplier Information tab	Displays the <i>Supplier ID</i>, <i>Supplier Name</i>, <i>Supplier Location</i>, <i>Supplier Item ID</i>, and <i>Supplier's Catalog</i> fields. The tab populates the default values set up for the selected item. Note: If you change the supplier details, the other fields such as Supplier Item ID, Supplier's Catalog, UOM, Manufacturer ID, and Manufacturer's Item ID would also reflect the change. This is applicable only to item only lines.
Manufacturer Information tab	Displays the <i>Manufacturer ID</i>, <i>Manufacturer's Item ID</i>, <i>UPN Type</i>, and <i>UPN ID</i> fields. The tab populates the default values set up for the selected item. Note: The system first checks for the Item/Supplier manufacturing information and uses it if available. But if it does not exist, the system will use the manufacturing information defined at the item level. If both these details are not available, the Manufacturer ID and Manufacturer's Item ID fields will be blank.
Add	Click this button to add all the items in the grid to the cart.

If you enter a special request item, you will be able to enter all the details on the page, except the item ID field.

Note: The item details you entered on the Express Entry page remain intact even if you navigate to another page in the middle of the create requisition process.

After entering the required items, you can add them to the cart and proceed to the checkout process. Once items are added to the cart, the Express Entry page is cleared.

If you proceed to submit existing items while you have items on the Express Entry page, you get a message indicating that there are more items on the Express Entry page.

Once you submit the requisition, the Express Entry page removes the items that were not added to the cart.

Using Fluid Express Forms to Create Requisitions

Express forms enable requesters to use a standardized form to order products that might need additional supporting information. You can create express forms for non-inventory items. These are predefined and configurable forms like business cards, where you can enter the required details and add to cart. An express form can be used by multiple requesters.

You can create as many express forms as you need. Express forms are captured on a requisition line and must go through the approval process if required. The fluid user interface supports creation of express forms for Supplemental Data Framework (SDF) only. You can enable the catalog type for express form to establish security setting for express forms.

To create an express form, you must define Express Form Profile and set up Supplemental Data page. You can create an express form to be used at the cart and edit requestion levels.

Defining Fluid Express Forms

To define express forms, use the Express Form Profile component (PV_EXP_APP_PROFILE).

This section provides an overview of how to define express forms using SDF.

Pages Used to Define Express Forms

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Express Form Profile Page</u>	PV_EXP_APP_PROFILE	To create and maintain profiles.
<u>Supplemental Data Page</u>	PV_SDF_OPTIONS	To set up and define supplemental data forms.

Express Form Profile Page

Use the Express Form Profile page (PV_EXP_APP_PROFILE) to create and maintain profiles.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Maintain Express Form Profile

This example illustrates the fields and controls on the Express Form Profile page.

< Maintain MarketSite
Express Application Profile

Express Form ID FL_BCSDP

Merchant Information

| < > | 1 of 1 v | View All

Express Form Type	Fluid Supplemental Data Form ▼	☒ Activated?	+ -
*Effective Date	11/02/2021		
*Description	Business Card SDF		
Supplier SetID	SHARE		
Supplier ID	USA0000001	Supplier Location	1
SetID	SHARE	Category ID	00001
Unit of Measure	EA	Currency Code	USD
Contact Name	Joe Smith		
Search Keywords	BUSINESS CARDS PRINTING		
Description	Order Customized Company SDF Business Cards		
	211 characters remaining		
Role Action Security			

Fluid Supplemental Data Form

*Menu Name	PV_MOB_MENU
*Component Name	PV_MOB_855_CMP
*Page Name	PV_MOB_EXPFORM_FL
Image Name	PS_PV_BUSINESS_CARD_FL

Default Options

Quantity	250;500;1000	☒ Editable
Unit Price	0.1;0.5;0.75	☒ Editable

Form Description

Message Set Number	Message Number

<i>Field or Control</i>	<i>Description</i>
Express Form ID	Enter a relevant ID. Express form ID field must be 8 characters in length.

Field or Control	Description
Copy From	Displays only when the express form type is <i>Supplemental Data Form</i> . Click this button to copy any existing classic express forms to the fluid profile. The remaining fields will be filled in automatically based on the selected profile.
Express Form Type	For the fluid version, you must select <i>Fluid Supplemental Data Form</i> .
Activated	Select this check box to make an express form active.
Editable	Select this check box against the Default Options fields to allow a requester to override the Quantity and Unit Price field values while creating requisition.

After entering the values, save the form. This express form created can be used in creating requisitions using fluid.

Note: When you save an express form, it also creates a copy to be used for edit requisition. The new form ID will be concatenated with *_E*, indicating that this express form is used for edit requisition. Two express forms are necessary because of the fluid persistent cart. These forms should always be identical, thus the edit express form is always read only. You can find the difference in the Express Form type field. It changes to *Edit Fluid Requisition Form*.

Supplemental Data Page

Use the Supplemental Data page (PV_SDF_OPTIONS) to set up and define supplemental data forms.

There are different steps in creating a supplemental data form. You can select menus in the left pane and individually add values to the records, and save it. See PeopleTools: *Portal Technology*, Working with Navigation Pages and Navigation Collections

For additional information on Supplemental Data, see “Establishing Supplemental Data” (Enterprise Components)

Navigation:

Fluid home page > Configuration Specialist > Supplemental Data

This example illustrates the fields and controls on the Sup Data Register Record page.

The screenshot shows the 'Supplemental Data' configuration page for the 'Sup Data Register Record'. The left sidebar contains a menu with the following items: 'Sup Data Register Record' (highlighted), 'Sup Data Register Component', 'Supplemental Data Record', 'Define Display Group', and 'Assign Display Group'. The main content area is titled 'Register Record' and includes the following fields and controls:

- Base Record:** PV_ITM_SRCH_REC
- Saved Search Record:** A search input field with a magnifying glass icon.
- Data Store Records:** A table with 2 records. Each record has a search input field for the Data Store Record and a search input field for the Saved Search Record. The table also includes a 'Recycle Cache' checkbox.

	*Data Store Record	Saved Search Record		
1	PV_ITM_CART_SDF		+	-
2	PV_ITM_EDIT_SDF		+	-

☐ Recycle Cache

Sup Data Register Record

Supplemental Data framework requires a base record that shares the same buffer level and keys with the supplemental data store record. For the fluid requisition component, PV_ITM_SRCH_REC known as cart record is going to be the base record along with two new data store records. These are PV_ITM_CART_SDF and PV_ITM_EDIT_SDF. Two data store records are required for a requester. One to capture the SDF data at the cart level and one for edit requisition level.

Sup Data Register Component

Access the Register Component page by selecting the Sup Data Register Component menu. This page contains the SDF subpage and the base record to be associated to the fluid requisition component.

This example illustrates the fields and controls on the Sup Data Register Component page

The screenshot shows the 'Supplemental Data' configuration page for the 'Sup Data Register Component'. The left sidebar contains a menu with the following items: 'Sup Data Register Record', 'Sup Data Register Component' (highlighted), 'Supplemental Data Record', 'Define Display Group', and 'Assign Display Group'. The main content area is titled 'Register Component' and includes the following fields and controls:

- Component Name:** PV_MOB_855_CMP
- Description:** Fluid Requisitions
- Context Name:** eProcurement Fluid Express Form
- Market:** Global
- Enabled Pages:** A table with 1 record. Each record has a search input field for the Page Name, a search input field for the Base Record, and a search input field for the Search Page. The table also includes a 'Recycle Cache' checkbox.

	*Page Name	*Base Record	Search Page		
1	PV_MOB_EXPFORM_FL	PV_ITM_SRCH_REC		+	-

☐ Recycle Cache

Supplemental Data Record

Access the Data Record page by selecting the Supplemental Data Record menu. Use this page to define record values, field summary, and field detail for the form. The data needs to be identical for PV_ITM_CART_SDF and PV_ITM_EDIT_SDF to see fields/values pair same.

This example illustrates the fields and controls on the Supplemental Data Record page

The screenshot shows the 'Supplemental Data' page in the 'Configuration Specialist' interface. On the left is a navigation menu with the following items: 'Sup Data Register Record', 'Sup Data Register Component', 'Supplemental Data Record' (highlighted in green), 'Define Display Group', and 'Assign Display Group'. The main area has three tabs: 'Record' (active), 'Fields Summary', and 'Fields Detail'. The 'Record' tab contains the following fields and controls:

- Record:** FL_BC_SD_RCD
- *Status:** Activated (dropdown menu)
- Base Record:** PV_ITM_SRCH_REC
- Description:** eProcurement supplemental data record for cart. (text area with a character count of 53 characters remaining)
- *Data Store Record:** PV_ITM_CART_SDF (with a search icon)
- ☐ Recycle Cache

When you define a record, its status will be *Activated*. However, you can change it to *In Design* if the record design is not complete.

Define Display Group

Access the Define Display Group page by selecting the Define Display Group menu. Use this page to define the fields and field labels to be displayed in the form. You must define a display group for cart and another display group for edit cart options, and name them as you like.

This example illustrates the fields and controls on the Define Display Group page

Supplemental Data

- Sup Data Register Record
- Sup Data Register Component
- Supplemental Data Record
- Define Display Group
- Assign Display Group

Define Display Group

Display Group FL_BC_DSP_GRP
Base Record PV_ITM_SRCH_REC

Description eProcurement Express Forms display group for cart.
 50 characters remaining

Label Business Card SDF
*Occurs 1

Left Column

1-5 of 9

View All

*Sequence	*Record	*Field Name	Label		
1	FL_BC_SD_RCD	NAME	Name	+	-
2	FL_BC_SD_RCD	TITLE	Title	+	-
3	FL_BC_SD_RCD	DIVISION	DIVISION	+	-
4	FL_BC_SD_RCD	ADDRESS LINE 1	Address Line 1	+	-
5	FL_BC_SD_RCD	ADDRESS LINE 2	Address Line 2	+	-

Right Column

1-5 of 6

View All

*Sequence	*Record	*Field Name	Label		
1	FL_BC_SD_RCD	BUS CARD STYLE ID		+	-
2	FL_BC_SD_RCD	TELEPHONE1	Mobile	+	-
3	FL_BC_SD_RCD	TELEPHONE	Home Phone	+	-
4	FL_BC_SD_RCD	TELEPHONE2	Fax	+	-
5	FL_BC_SD_RCD	URLID		+	-

☐ Recycle Cache

You can list the fields in the desired sequence, associate it to the record, enter the field name, and it's label. You can also reorder the fields.

Assign Display Group

Access the Assign Display Group page by selecting the Assign Display Group menu. Use this page to assign the display groups to the corresponding component.

This example illustrates the fields and controls on the Assign Display Group page

Sup Data Register Record

Sup Data Register Component

Supplemental Data Record

Define Display Group

Assign Display Group

Supplemental Data

Assign Display Group

Component NamePV_MOB_855_CMPMarketGlobal

Enabled Pages

Page NamePV_MOB_EXPFORM_FLBase RecordPV_ITM_SRCH_REC

Display Groups

*Sequence	*Display Group	*Use	User-friendly Text	Edit	Clear		
1	FL_BC_DSP_GRP	Editable	eProExpressForms equals FL_BCSDF			+	-
2	FL_BC_EDIT_DSP_Q	Editable	eProExpressForms equals FL_BCSDF_E			+	-

Reorder

☐ Recycle Cache

You can edit the sequence numbers for the display groups to reorder it. You can also define conditions for individual fields in the display group based on which the supplemental data will be displayed. Click the edit icon to associate the display group to ePro express form profile.

This example illustrates the fields and controls on the Assign Display Group - Edit page

Assign Display Group

ComponentPV_MOB_855_CMPMarketGlobal

Page NamePV_MOB_EXPFORM_FLDisplay GroupFL_BC_DSP_GRP

Switch to Advanced Mode

Conditions

Term	Operator	Value		
eProExpressForms	equals	FL_BCSDF	+	-

Done

Cancel

Related Links

“Establishing Supplemental Data” (Enterprise Components)

Creating Requisitions Using Express Forms

Peoplesoft fluid requisition supports the SDF express forms.

To order express form items:

- 1. Create or edit a requisition.
- 2. Select **Express Forms**.

3. Click the link for the type of form that you want to order.
4. Enter the required details.
5. Save the request and access the Requisition Checkout page.

Note: You must select *Visible* checkbox for Express Forms on the eProcurement Requisition Navigation page to view it in fluid requisition. For additional information, see [Setting Up eProcurement Requisition Navigation: Classic Page](#)

Pages Used to Create Requisitions Using Express Forms

Page Name	Definition Name	Usage
Express Forms Page	PV_MOB_SRCH_EF_FL	To create requisitions for ordering items.
Express Forms- Checkout page	PV_MOB_NEW_CHEKOUT	To review requisition details, make final adjustments, and place orders.
Express Forms-Line Details Page	PV_SCH_DIST_SCF	To confirm requisition checkout information and edit additional details for a line, such as the buyer, supplier, and other line-specific information.

Express Forms Page

Use the Express forms page (PV_MOB_SRCH_EF_FL) to create requisitions for ordering items.

Navigation:

Fluid Home page > eProcurement > Create Requisition

Select a **Requisition Type** (Standard, Bill Only, and Bill and Replace) from the drop-down.

Note: If any item is already added to the **Shopping Cart**, the Requisition Type is grayed out. Remove the item from the cart to select the Requisition Type.

To configure Requisition Type, see [Setting Up Installation Options for Fluid eProcurement](#).

Click the **Express Forms** menu in the left pane.

This example illustrates the fields and controls on the Create Requisition- Express Forms page.

Click an express form to begin the requisition process.

This example illustrates the fields and controls on the Express Form page.

The page displays the fields defined in the Supplemental Data Form, except **Unit Price** and **Quantity**. The price and quantity fields are defined in the express form profile.

Enter relevant data for the express form and add it to the cart.

Express Forms- Checkout page

Use the Checkout page (PV_MOB_NEW_CHEKOUT) to review requisition details, make final adjustments to quantity, and place orders.

Navigation:

Fluid Home page > eProcurement > Create Requisition > Shopping Cart > Checkout

This example illustrates the fields and controls on the Checkout page

Create Requisition

Continue Shopping

Save

Submit

Order Total 100.00 USD

Checkout

Requisition Summary

Business Unit US001

Requisition Name

Priority

Medium

Header Comments/Attachments

Requester VP1

Currency USD

Card Number

Expiration Date

Use Procurement Card

No

Requisition Lines

1 row

★ Add to Favorites

📄 Add to Template(s)

🗑 Delete Selected

🔄 Mass Change

Line	Item Description	Quantity	Unit of Measure	Price	Currency	Total	
☐ 1	 Business Card SDF_1	1,000	EA	0.10	USD	100.00 USD	📅 💬 ➡

Justification Comments

🔍 Check Budget

🔍 Pre-Check Budget

📄 Add Request Document

Note: You cannot perform the Add to Favorites and Add to Template(s) actions for an express form item. When you try to perform these actions, the system displays a message indicating that you cannot add the item. Also, for express form items, you cannot use the Item History option.

Click on the item description link to view the express form. While saving the data, it will be copied to the line comments. On the Checkout page, if you click the **Edit Comments and Attachments** icon, you can see all the data in the Comment Text field. The comments, which contain all the express form information, will be sent to the suppliers by default.

Express Forms-Line Details Page

Use the Line Details page (PV_SCH_DIST_SCF) to confirm requisition checkout information and edit additional details for a line, such as the buyer, supplier, and other line-specific information.

Navigation:

Fluid Home page > eProcurement > Create Requisition > Shopping Cart > Checkout

Select the **View Details** icon for a line.

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This example illustrates the fields and controls on the Line Details page

The **Attributes** section displays *Forms* to indicate that the requisition item is an express form.

After making the required changes, submit the requisition. On the confirmation page, you can click the Edit Requisition button to make further modification to the order details.

Creating Bill Only Requisition Using XML File Upload

PeopleSoft eProcurement supports the creation of bill only requisitions using XML file upload.

Setting Up XML File Upload for Bill Only Requisitions

Follow these steps to set up XML file upload to create Bill Only requisitions:

1. Use **Requisition Loader Defaults** page (Set Up Financials/Supply Chain > Product Related > Procurement Options > Purchasing > Requisition Loader Defaults > Overrides and Options) to define mapping keys for the Requesting Loader Business Unit.
 - a. Click **Add a New Value**. On the **Add a New Value** page, select **System Source** as **BO** and select a **Requesting Loader Bus Unit**. Click **Add**.
 - b. On the **Overrides and Options** tab, enter the unique *XML Reference ID* and *XML Reference Value* in the Mapping Keys section.

In the Requisition Loader Options group box, enable **Create Special Request If Item not Found** checkbox to create special request if the specified item is unavailable while creating the requisition via XML upload.

For more details about the Requisition Loader Defaults page, see “Requisition Loader Defaults - Overrides and Options Page” (PeopleSoft Source to Settle Common Information).

2. Use **Inbound File Rule** page (Enterprise Components > Integration Definitions > Inbound File Rule) to define XML file path and service operations for the File Identifier *PURCHASE_REQLOAD_BO*.
 - a. Enter the XML file path in the **Inbound File** field.
 - b. In the File Layout section enter the Definition Name *PURCHASE_REQLOAD_BO* and the Message Name *PURCHASE_REQLOAD_BO*.

For more details about Inbound File Rule, see “File Inbound Page” (Integration Interfaces).

Creating Bill Only Requisition Using XML File Upload

To create Bill Only Requisition using XML file upload:

1. Run the **Inbound File Publish** process for the File Identifier *PURCHASE_REQLOAD_BO*.

For more details about Inbound File Publish, refer “Inbound File Publish Page” (PeopleSoft Managing Items).

2. Once the Inbound File Publish process is done, you can verify the number of lines processed on the Monitor Asynchronous Services page. On this page, select the number of services Done link to view the Result on the Operation Instances tab.

Click *Sub Queue* Link corresponding to the transaction ID and then click *Details* link to view the details on the Asynchronous Details page. To know more about Asynchronous Details, refer Asynchronous Details page (*PeopleTools, Integration Tools, Integration Broker Service Operations Monitor, Viewing Asynchronous Service Operation Details, Viewing Asynchronous Service Operation Instance Details*).

If there is an error, click the *Error* link on the Asynchronous Details page to view the complete error details and fix the XML file. If the process is done successfully, the Action Status is Done and the request ID is created.

3. Once the Request ID is created, the system source and Requisition Request ID are also loaded in the staging table on the Stage Requisitions page for reviewing and modifying any details.

If there is any error in the source line, the status displays Error. Select the source line check box and click the View Errors link to review the list of errors to correct and run the process again.

You can also add Header and Line Custom Fields by clicking the respective links. For more details about the Stage Requisitions page, refer “Requisition Loader Request Page” (PeopleSoft Purchasing).

4. Run the Load Requisitions process for the created Requisition Request ID, including the System Source and Business Unit, to create the requisition.

For more details about Load Requisitions page, refer “Requisition Loader Page” (PeopleSoft Purchasing).

Note: You can view the list of Bill Only requisitions created from the XML upload on the My Requisitions and Requester Mass Change pages.

Managing Requisitions Using the Fluid User Interface

Managing Requisitions

The My Requisitions feature provides you with the ability to review, edit, approve, or cancel requisitions. You can view requisitions in any status. You can only edit active requisitions that have not been sourced and do not have a status of *Complete*, or *Canceled*.

After you dispatch a requisition on a purchase order, the goods are received and the supplier is paid. The Requisition Reconciliation process (PO_REQRCON) then identifies the requisition status as *Complete*.

This section discusses how to manage requisitions, view requisition details, distribution and chartfields details, value added tax (VAT) details for distributions, edit requisitions, and cancel or reopen requisitions.

Pages Used to Manage Requisitions Using the Fluid User Interface

Page Name	Definition Name	Usage
<u>My Requisitions Page</u>	PV_MOB_855_ORDR_FL	View a list of requisitions that you have ordered.
<u>Details Page</u>	PV_MOB_855_ORDRSCF	View the requisition summary, requisition lifeline, and requisition lines.
<u>Requisition Details Page</u>	PV_REQ_INQUIRY_FL	To get detailed information about the requisition, including comments, attachments, item descriptions, schedules, distributions, and line details.
<u>Requisition Line Details - Schedule Details and Line Details Page</u>	PV_REQ_SCH_DIS_SCF	View the requisition line and schedule details for the selected line item.
<u>My Requisition - Edit Requisition Page</u>	PV_MOB_NEW_CHEKOUT	To review the contents of the requisition, make final adjustments to quantity and UOM, add last-minute items to the requisition, and to place orders.

My Requisitions Page

Use the My Requisitions page (PV_MOB_855_ORDR_FL) to view a list of requisitions that you have ordered.

Navigation:

Employee Self Service > eProcurement > My Requisitions

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

My Requisitions									
Requisition Search Keyword Search									
Action	Requisition Name	Business Unit/Requisition ID	Priority	Requisition Type	Requisition Date	Requester	Request State	Budget Status	Total Amount
	0000000048	WCGEN/0000000048	Medium	Standard	10/20/2022	BBLOCK	Approved	Not Chk'd	40,000.00 USD
	0000000046	WCGEN/0000000046	Medium	Standard	04/27/2017	BMURKAMI	Open	Not Chk'd	1,134.50 USD
	0000000045	WCGEN/0000000045	Medium	Standard	04/27/2017	BMURKAMI	Open	Not Chk'd	3,895.00 USD
	0000000044	WCGEN/0000000044	Medium	Standard	04/25/2017	BMURKAMI	Open	Not Chk'd	5,298.50 USD
	0000000043	WCGEN/0000000043	Medium	Standard	04/25/2017	BMURKAMI	Approved	Not Chk'd	13,912.40 USD
	0000000042	WCGEN/0000000042	Medium	Standard	04/25/2017	BMURKAMI	Approved	Not Chk'd	182.86 USD
	0000000041	WCGEN/0000000041	Medium	Standard	03/10/2017	BMURKAMI	Approved	Not Chk'd	365.73 USD
	Laptop	WCGEN/0000000040	Medium	Standard	01/25/2017	TELLIS	Approved	Not Chk'd	4,500.00 USD

Use this page to review requisitions. From this page, you can access other pages to perform tasks, such as review requisition details, edit or cancel requisitions, create change requests, receive stock, copy requisition, view approvals, or return stock to the supplier.

The number of requisitions shown on this page depends on the configuration done on the eProcurement Installation Options page. The default number of results is 50. However, it is recommended to keep this value low as a large number of items may take longer to display, depending on the hardware configuration and the memory capacity of the system.

If the ALLOW_RUSH_REQ role action is enabled for the requester, the Priority column on this page becomes visible and displays the requisition priority (Rush, High, Medium, and Low). If this role action is disabled, the priority column is hidden, but still requesters can view and edit the rush requisitions they created but cannot modify the priority.

To know more about ALLOW_RUSH_REQ role, refer to the [eProcurement Role Actions Page](#) and assigning roles, refer to [Assign Role Actions To Roles Page](#).

Requisition Search Tab

Requisition Search tab displays the list of requisitions based on the filters criteria.



Click the **Update Filters** button or  (Filters by icon) to view the **Filters** page. Enter search criteria on Filters page and click **Done** button to display the requisitions.

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

If all the fields are left blank on the Filters page except for Business Unit then all the requisitions are retrieved for that Business Unit.

The From Date that appears on this page is based on the entered Fluid Filter Default Days on the Installation Options page. If no From Date is defined, then the default From Date is 14 days from the current date. You can also configure common filter values retention and filter search field options on the Installation Options page. To know more, refer to the Filter Retention Options section on the [Setting Up Installation Options for Fluid eProcurement](#).

Field or Control	Description
Business Unit	Select the PeopleSoft business unit.
Requisition ID	Enter a specific requisition ID to display.
From Date and To Date	Enter the creation date or range of dates for the requisitions.
Requester	Enter the requester name of the requisition.

Field or Control	Description
Request State	Select the state for the overall requisition (header-level) to limit the requisitions displayed to this status. Leave this field blank to display search results without using request state as a search criteria. The following search criteria are included: • <i>All but Complete</i> — Displays all requisitions except those with the state <i>Complete</i>. • <i>Approved</i> • <i>Canceled</i> • <i>Complete</i> • <i>Denied</i> • <i>Open</i> • <i>PO Partially Canceled</i> • <i>PO Partially Completed</i> • <i>PO Partially Created</i> • <i>PO(s) Created</i> • <i>PO(s) Canceled</i> • <i>PO(s) Completed</i> • <i>PO(s) Dispatched</i> • <i>Partially Dispatched</i> • <i>Partially Received</i> • <i>Pending</i> • <i>Received</i> • <i>See Lines</i>
Supplier ID	Enter or select the supplier ID, or use the Lookup page to select a supplier.
Supplier Name	Enter the Supplier Name. You can enter the full supplier name or partially. Search results display the requisitions that contain or begin with the entered keyword. This field is not case-sensitive.

Field or Control	Description
Item ID	Enter the item ID for a requisition line.
Ship To Location	Enter the ship to location code.
Requisition Name	Enter the given Requisition Name.
PO Number	Enter the Purchase Order Number where the requisition was sourced.
Entered by	Enter the user ID of the individual who entered the requisition. This is usually the requester but can be another individual. Note: If BO is enabled for SYSTEM_SOURCE on the Maintain Translate Values page, REQLOAD is available to select to filter the Bill Only requisitions created from the XML upload.
Budget Status	Displays the header results of a budget check initiated by clicking the Check Budget button or the Pre-Check Budget button. The options are: • <i>Valid:</i> The requisition passed budget checking and the Budget Processor has updated the control budget ledger (LEDGER_KK). • <i>Not Budget Checked:</i> The Budget Processor has not processed the requisition. • <i>Error in Budget Check:</i> The requisition failed budget checking. • <i>Provisionally Valid:</i> The requisition passed budget checking but no pre-encumbrance was created in the control budget ledger. • <i>Document In Processing</i>
Item Description	Enter the item description used by the supplier for the item.
Supplier Item ID	Enter the item ID used by the supplier for the item.

Field or Control	Description
Requisition Type	The search results display requisitions based on the selected requisition type. Select any of the following requisition types: • BO: Bill Only • BR: Bill and Replace • STD: Standard
Priority	Select a Priority (Rush, High, Medium, or Low) to filter the requisitions based on the required selection. Note: The priority filter criteria appear only if the ALLOW_RUSH_REQ role action is enabled. To know more about this role, refer to the eProcurement Role Actions Page, and to assign the roles, refer to the Assign Role Actions To Roles Page.

Keyword Search Tab

Enter a word (for example monitor) or a string of characters in the Keyword Search box, and then click the **Search** button to display the requisitions having keyword.

This example illustrates the fields and controls on the My Requisition Keyword Search page. You can find definitions for the fields and controls later on this page.

My Requisitions

Requisition Search **Keyword Search**

Keyword: **Search** **Clear** [Show Advanced Search](#) ⓘ

Business Unit

- ☐ US003 (13)
- ☐ US001 (7)
- ☐ EGNBU (5)
- ☐ EGNBU (3)
- ☐ WCGEN (3)
- ☐ BLG01 (2)
- ☐ FRA01 (2)
- ☐ CAN01 (1)
- ☐ DEU01 (1)
- ☐ EGV05 (1)

[More](#)

Requisition Date

- ☐ 2021 (3)
- ☐ 2018 (1)
- ☐ 2017 (2)

View Search Results

Search results about 7 hours old.
43 results for keyword: "monitor"

Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Total Amount	
⊖	REQ03	BLG01/REQ03	08/09/2000	VP1	Approved	31328 BEF	>
⊖	REQ02	BLG01/REQ02	08/09/2000	MGR1	Approved	115508 BEF	>
⊖	REQ01	CAN01/REQ01	08/09/2000	MGR4	Approved	507.67 CAD	>
⊖	REQ02	DEU01/REQ02	08/09/2000	VP1	Approved	753.41 DEM	>
⊖	0000000010	EGNBU/0000000010	06/28/2016	CMONET	Approved	500.00 USD	>
⊖	0000000009	EGNBU/0000000009	06/28/2016	CMONET	Approved	750.00 USD	>

43 rows

The facets on this page enable you to quickly and easily filter your search results. When you click a facet link, the system displays only the search results associated with the facet. If you select multiple facets, the system filters the search results so that only the search results associated with all of the facets appear.

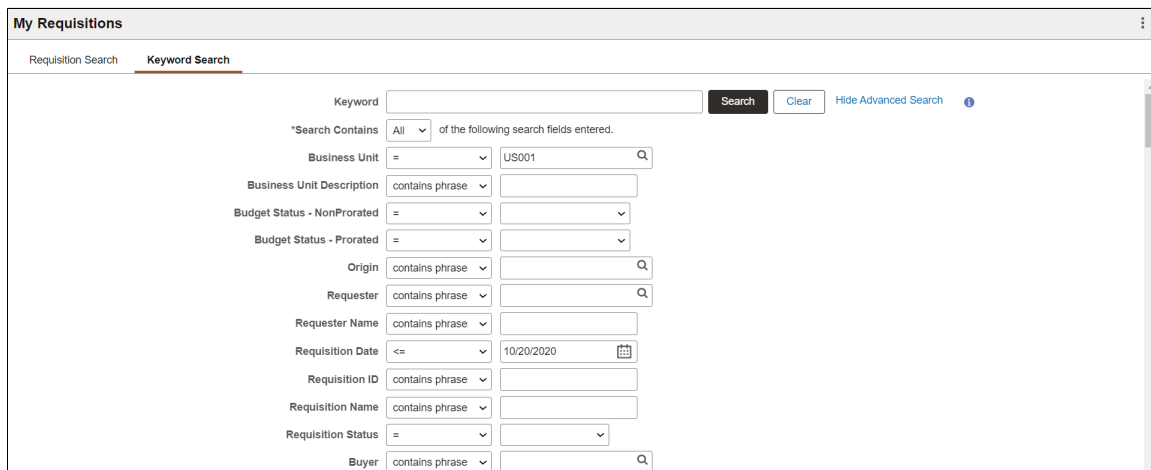
The available facets are Business Unit, Requisition Date, Requester Name, Budget Checking Header Status, Supplier Name, and Requisition Status.

Field or Control	Description
Clear	Click to clear the search result and start a new search entry.
 (Search Tips)	Click Search Tips icon to view the General Search Guidelines for Keyword Search.

Advanced Search

Click **Show Advanced Search** to expand this section to enter much more specific search criteria. In addition to entering values for fields, you can select operands for those field values. For example, if you want to search for requisitions created on 20.10.2020, you can select = and enter same date in the Requisition Date criteria field.

This example illustrates the Advanced Search criteria that you can use to search for positive input entries.



My Requisitions

Requisition Search **Keyword Search**

Keyword **Search** **Clear** [Hide Advanced Search](#) 

*Search Contains All of the following search fields entered.

Business Unit = 

Business Unit Description contains phrase

Budget Status - NonProrated =

Budget Status - Prorated =

Origin contains phrase 

Requester contains phrase 

Requester Name contains phrase

Requisition Date <= 

Requisition ID contains phrase

Requisition Name contains phrase

Requisition Status =

Buyer contains phrase 

This is an example of search results generated using Advanced Search criteria.

My Requisitions

Requisition Search

Keyword Search

Keyword

Search

Clear

Show Advanced Search

Business Unit

☐ US001 (110)

Requisition Date

☐ 2020 (4)
☐ 2019 (2)
☐ 2018 (3)
☐ 2017 (2)
☐ 2016 (12)
☐ 2015 (1)
☐ 2014 (3)
☐ 2012 (1)

More

Requester Name

☐ Kenneth Schumacher (60)
☐ Sanchez, Yolanda (12)
☐ Calvin Roth (8)
☐ TIRVING (8)
☐ Rob Requester (7)
☐ Chris Baker (5)

View Search Results

Note: Real Time Indexing is enabled.

110 results for keyword: "test"

50 rows

Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Total Amount	
	0000000213	US001/0000000213	10/20/2020	TIRVING	Approved	290.00 USD	
	0000000174	US001/0000000174	10/20/2020	VP1	Approved	290.00 USD	
	0000000173	US001/0000000173	10/20/2020	VP1	Approved	300.00 USD	
	0000000172	US001/0000000172	10/20/2020	VP1	PO(s) Dispatched	290.00 USD	
	0000000171	US001/0000000171	05/06/2019	TIRVING	Approved	556,200.00 USD	
	0000000170	US001/0000000170	02/01/2019	CROTH	Received	139.80 USD	
	0000000169	US001/0000000169	11/06/2018	TIRVING	Approved	275,000.00 USD	
	0000000168	US001/0000000168	11/05/2018	TIRVING	Approved	995,600.00 USD	
	Monitors	US001/0000000167	05/01/2018	CROTH	Partially Received	470.00 USD	

Requisitions

This group box displays requisitions based on the search criteria. Basic information about the entire requisition (requisition header-level) is displayed for each requisition. You can view additional information, including line details by using the details icon.

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Field or Control	Description
	Select the Actions icon to perform the following related action on the requisitions: • Check Budget — Select to budget check the requisition. You can budget check only when the Request state is approved. • Edit — Select to access the My Requisition - Edit Requisition Page where you can make changes to the requisition and submit it again. You can edit requisitions in Open, Pending or Approved status only. • Cancel — Select to cancel requisition. • Details — Select to access the Details Page. • PreCheck Budget • Copy — Select to copy the requisition with priority, header, line, schedule, and distribution details. If the requisition has header comments, line comments, schedule comments, attachments, and one time address records, the action copies them too. After copying the items, the Shopping Cart page displays. The newly added items are not saved to the existing shopping cart. Note: If ALLOW_RUSH_REQ role is enabled on the Assign Role Actions To Roles Page, you can copy a rush requisition and create another rush, high, medium, or low priority requisition. If the ALLOW_RUSH_REQ role is disabled, you can copy the rush requisition that you created, but you cannot create another rush requisition from it, the default will be medium. You can create only high, medium, or low priority requisitions. • View Print — Select to view the print format of the selected requisition. If the requisition priority is Rush, ***RUSH ORDERS*** text appears at the top of the print preview to indicate the rush requisition. • Create Receipt — Select to Create Receipt for the requisition. If the requisition Request State is Partially Dispatched or PO(s) Dispatched, then Create Receipt action is available.

Field or Control	Description
	• Create Return — Select to Create Return for the requisition. If the requisition Request State is Partially Received or Received, then Create Return action is available. • Inquiry — Select to view the Requisition Details page. For more information, see Requisition Details Page. Note: The options that appear for a requisition differ depending on the status of the requisition. For example, you cannot cancel a requisition for which a PO is created.
Requisition Name	Displays the description of the request entered by the requester when the requisition was added. The requisition name helps to identify this requisition as it flows through the system. If no requisition name was entered, then the requisition ID is displayed.
Business Name/Requisition ID	Displays the PeopleSoft Purchasing Business Unit and requisition ID for this requisition.
Requisition Date	Displays the date the requisition was created.
Requester	Displays the ID of the requester who created the requisition.

Field or Control	Description
Request State	This state field displays the request state across the entire procurement cycle, not just the requisition header state. The following states are included: • <i>Approved:</i> The requisition have been approved and is ready for sourcing. For this status to display at the header level, all lines of this requisition must be in the Approved status. • <i>Cancelled:</i> The requisition was entered and saved but then the entire requisition or each requisition line was canceled. For this status to display at the header level, all lines of this requisition must be in the Canceled status. A canceled requisition can be reopened within a certain number of days as specified for the Purchasing business unit; otherwise, it is closed permanently. • <i>Complete:</i> The requisition is marked complete after the requisition is dispatched on a PO, the goods are received and the supplier is paid. A background process identifies the requisitions and moves them to the complete status. Canceled requisitions and those that are fulfilled by inventory stock are also identified as complete. • <i>Denied:</i> The entire requisition or each requisition line has been denied in the approval process. For this status to display at the header level, all lines of this requisition must be in the Denied status. • <i>Open:</i> The requisition has been entered and saved but not yet submitted. For this status to display at the header level, all lines of this requisition must be in the Open status. • <i>PO Partially Canceled:</i> The requisition contains some lines that have been placed on purchase orders and these purchase orders have been subsequently been canceled. For this status to display, the purchase orders must all have the same status, Canceled. This status indicates that some of the requisition lines have not been sourced to a purchase order and it also indicates that none of the lines have been received or returned to supplier. • <i>PO Partially Completed:</i> The purchase order has been closed for some of the requisition lines , however the requisitions are not yet closed. • <i>PO Partially Created:</i> The requisition contains some lines that have been sourced to an approved purchase order. For this status to display, the purchase orders must all have the same status, Approved. This status indicates that some of

Field or Control	Description
	the requisition lines have not been sourced to a purchase order and it also indicates that none of the lines have been received or returned to supplier. • <i>PO(s) Created:</i> The requisition has been placed on a PO that has been approved. This header status indicates that all lines of this requisition have been sourced to approved purchase orders and the requisition line status is PO(s) Created. For this status to display, the purchase orders must all have the same status, Approved. • <i>PO(s) Cancelled:</i> The requisition has been placed on a PO that has been subsequently been canceled. This header status indicates that all lines of this requisition have been sourced to canceled purchase orders and the requisition line status is PO(s) Canceled. For this status to display, the purchase orders must all have the same status, Canceled. • <i>PO(s) Completed:</i> The purchase order has been closed for all of the requisition lines , however the requisitions are not yet closed. • <i>PO(s) Dispatched:</i> The requisition has been placed on a purchase order and the purchase order has been dispatched to the supplier. This header status indicates that all lines of this requisition have been sourced to dispatched purchase orders and the requisition line status is PO(s) Dispatched. For this status to display, the purchase orders must all have the same status, Dispatched. • <i>Partially Dispatched:</i> The requisition contains some lines that have been placed on purchase orders and these purchase orders have been dispatched to the supplier. For this status to display, the purchase orders must all have the same status, Dispatched. This status indicates that some of the requisition lines have not been sourced to a purchase order and it also indicates that none of the lines have been received or returned to supplier. • <i>Partially Received:</i> The requisition contains some lines that have been placed on a purchase order, the purchase order has been dispatched to the supplier, and the goods have been fully or partially received. This status indicates that some of the requisition lines have not been received. • <i>Pending:</i> The requisition has been submitted and is awaiting approval. This header status indicates that all lines of this requisition have the line status of Pending.

Field or Control	Description
	• <i>Received:</i> The requisition has been placed on a purchase order, the purchase order has been dispatched to the supplier, and the goods have been fully received. For this status to display at the header level, all lines of this requisition must be in the Received status. • <i>See Lines:</i> The lines of this requisition are in various stages of the approval process and the lines have different statuses (i.e. pending, approved, denied, and so on); however, none of the lines have been sourced to a purchase order.
Total Amount	Displays the total price amount of all the items in the requisition.
 (Details)	Select to access the Details Page .

Details Page

Use the Details page (PV_MOB_855_ORDRSCF) to view the requisition summary, requisition lifeline, and requisition lines.

Navigation:

Employee Self Service > eProcurement > My Requisitions. Select the Requisition Details icon.

Or

Click the Related Actions icon and select Details.

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

Cancel Requisition

Requisition Summary

Requisition Name 0000000175

Business Unit US001

Requisition ID 0000000175

Request Date 06/23/2024

Request State Approved

Requester Kenneth Schumacher

Entered By Kenneth Schumacher

Budget Check Status Not Chkd

Total Amount 20,400.00 USD

View Requisition Header Comments/Attachments

Approval Justification

NA

Requisition Lifeline

Requisition

Approval

Inventory

Purchase Order

Change Request

Receiving

Delivery

Returns

Invoice

Payment

Lines

Item Image	Description	Item ID	Supplier ID	Supplier Name	Ship To	Line State	Quantity	UOM	Price	Total Amount	
	Line 1 - Sun Server	AM1003			US001	Approved	1	Each	20,000.00	20,000.00 USD	Cancel Line
	Line 2 - 3 Season Mummy Bag, Long	10037	SCM0000003	TRAILBLAZERS	US001	Approved	1	Each	120.00	120.00 USD	Cancel Line
	Line 3 - 17 inch LCD Display Computer Monitor, Analog/Digital	DSS_MONITOR_17	HC10028	Milton Computer Supplies	US001	Approved	1	Each	200.00	200.00 USD	Cancel Line

Cancel Requisition: Displays if the Request State is *Approved*. Select to cancel the entire requisition.

Requisition Summary

Requisition Summary displays the basic details of the requisition: Requisition Name, Business Unit, Requisition ID, Requisition Date, Request State, Requester, Entered By, Budget Check Status, and Total Amount.

Requisition Lifeline

The Requisition Lifeline section displays the business process flow for a requisition with links to various documents. The business process flow or lifecycle, includes icons for requisition creation, requisition approval, sourcing to inventory stock, sourcing to a purchase order, purchase order acknowledgments (POA), advanced shipping notices (ASN), change requests, receiving, returns, invoices, and payment. The icons are highlighted when the requisition has completed the step. Some of the icons link you to additional information on a separate page. In order to view the POA and ASN icons you must select the Requisition Lifeline Options on the eProcurement Business Unit Options page.

Stages in the requisition cycle that are complete or in progress are highlighted with active links.

Field or Control	Description
Requisition	Click the Requisition icon to access the Requisition Details page (PV_REQ_INQUIRY_FL), where you can view the requisition summary and requisition line details.

Field or Control	Description
Approvals	Click the Approvals icon to access the Approval Status page (EOAWMA_TXNHDTL_FL), where you can view the current approval status of the requisition and view line approval details.
Inventory	Click the Inventory icon to access the Stock Requests page (ORDER_INQ_INV), where you can view the material stock request created from this requisition to fulfill the demand using inventory stock.
Purchase Orders	Click the Purchase Orders icon to access the PO Inquiry page (PV_PO_LINE_INQ2_FL), where you can view the information about the purchase order that this requisition was sourced to; including, the purchase order number, buyer, and supplier.
POA	Click the POA icon to access the POA Inquiry page (PV_POA_INQUIRY_FL), where you can view the purchase order acknowledgement tied to the selected requisition. Select the Details icon of a purchase order to view its acknowledgement history.
ASN	Click the ASN icon to access the ASN Inquiry page (PV_ASN_INQ2_FL), where you can view the advanced shipping notice tied to the selected requisition. Select the ASN Details icon of a requisition to navigate to the ASN History page. If there is only one ASN, the ASN History page is displayed directly.
Change Request	Click the Change Request icon to access the Review Change Requests page (PV_MOB_855_CHNG_FL), where you can view requisition change request details after it has been sourced to a Purchase Order, view change reason, and processing error if any.
Receiving	Click the Receiving icon to access the Manage Receipts page (PV_RECV_UPDATE_REQ), where you can view the purchase order receipt linked to your requisition.
Delivery	Click the Delivery icon to access the Delivery Details page (PV_DELV_DTL_INQ_FL), where you can view the detailed delivery information for a receipt. If there are multiple receipts for a requisition, then the Delivery Summary page is displayed when you click the Delivery icon. You can view details of each receipt from this page.

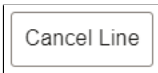
Field or Control	Description
Returns	Click the Returns icon to access the Manage Return To Vendor (Supplier)s page (PV_RTV_UPDATE_REQ), where you can view the RTV linked to your requisition.
Invoice	Click the Invoice icon to access the Invoice Inquiry (PV_PO_INQ2_FL), where you can view the requisition, purchase order, receipts, vouchers, and Invoice Number.
Payment	Click the Payment icon to access the Payment Inquiry page (PV_PYMNT_INQ2_FL), where you can view the payment details for the selected purchase order.

Lines

The Line Information group box displays information about each line within the requisition.

Line details provides the item name, description, item ID, supplier ID, supplier name, ship to, line state, item quantity UOM, item price, and total price for each item row.

Field or Control	Description
Line State (at the requisition line level)	This status field displays the status of the requisition line. The statuses include: • <i>Approved:</i> The requisition line has completed workflow approval and is approved. The line is ready for sourcing. • <i>Cancelled:</i> The requisition line was entered and saved but then canceled. A canceled requisition line can be reopened within a certain number of days as specified for the Purchasing business unit; otherwise, it is closed permanently. • <i>Complete:</i> The requisition line is marked complete after the line is dispatched on a PO, the goods are received and the supplier is paid. A background process identifies the requisition lines and moves them to the complete status. Canceled requisition lines and those that are fulfilled by inventory stock are also identified as complete. • <i>Denied:</i> The requisition line has been denied in the approval process. • <i>Open:</i> The requisition line has been entered and saved but not yet submitted. • <i>PO(s) Created:</i> The requisition line has been placed on a PO that has been approved. • <i>PO(s) Canceled:</i> The requisition line has been placed on a PO that has been subsequently been canceled. • <i>PO(s) Dispatched:</i> The requisition line has been placed on a purchase order and the purchase order has been dispatched to the supplier. • <i>Multiple PO(s):</i> The requisition line has been sourced to more than one purchase order and all are in different status. • <i>Pending:</i> The requisition line has been submitted and is awaiting approval. • <i>Received:</i> The requisition line has been placed on a purchase order, the purchase order has been dispatched to the supplier, and the goods have been fully received.

Field or Control	Description
	Click this icon to cancel a line on the requisition. You can cancel a requisition that has been sourced to a purchase order. If the cancellation completes budget checking and workflow approval, then the system creates a change request for cancelling the corresponding purchase order lines. A requisition line cannot be cancelled if you are using Commitment Control and the line has not yet pass budget checking. Also when a requisition line is sourced to multiple purchase orders it cannot be cancelled. If the approval process includes one or more stages that have only header level approval and a requisition line is cancelled, the entire requisition is resubmitted for approval for the entire approval process. For example, all stages are resubmitted. If the approval process includes one or more stages that have only line-level approval and a requisition line is cancelled, the line approval thread is terminated. If the approval process includes two or more stages that have a combination of line-level and header-level approval and a requisition line is cancelled, the line-level approval thread is terminated if the current stage that the approval is on is a line-level approval. If the current stage is a header-level , then the requisition is resubmitted for the entire process.
 (Requisition Schedule Details)	Select to access the requisition schedule details. For more information, see Requisition Line Details - Schedule Details and Line Details Page.

Requisition Details Page

Use the Requisition Details (PV_REQ_INQUIRY_FL) page to get detailed information about the requisition, including comments, attachments, item descriptions, schedules, distributions, and line details.

Navigation:

Employee Self Service > eProcurement > My Requisitions > Action > Inquiry.

Employee Self Service > eProcurement > My Requisitions > Select a Requisition > Requisition Lifeline > Requisitions.

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

Requisition Details

Requisition ID 000000175

Order Total 20,400.00 USD

Requisition Summary

Business Unit US001 NEW YORK OPERATIONS

Requisition Name 000000175

Requester VPI Kenneth Schumacher

Currency Code USD

Request State Approved

Priority Medium

Cardmember Number

Expiration Date

Use Procurement Card No

Budget Check Status Not Budget Checked

Header Comments

Justification Comments

NA

Requisition Lines Overview

3 rows

	Sun Server Item ID AM1003 Supplier Item ID Line Comments	Line Status Approved	Quantity 1	Unit of Measure EA	Price 20,000.00	Currency USD	Total 20,000.00 USD	>
	3 Season Mummy Bag, Long Item ID 10037 Supplier Item ID Line Comments	Line Status Approved	Quantity 1	Unit of Measure EA	Price 120.00	Currency USD	Total 120.00 USD	>
	17 inch LCD Display Computer Monitor, Analog/Digital Item ID DSS_MONITOR_17 Supplier Item ID Line Comments	Line Status Approved	Quantity 1	Unit of Measure EA	Price 280.00	Currency USD	Total 280.00 USD	>

Order Total 20,400.00 USD

Note: This page displays the information in read-only mode.

Requisition Summary

Field or Control	Description
Requisition Name	Displays a description of the request to help you identify this requisition as it flows through the system. If this field is left blank, the system uses the requisition ID as the name.
Priority	Displays the Priority of the requisition (Rush, High, Medium, or Low).
Header Comments	Select to access the Requisition Header Comments and Attachments window. This page is also used to indicate whether the comment is sent to the supplier, show the comment at receipt, and show the comment at voucher.

Justification Comments

Displays comments to justify the need for the requisition.

Requisition Lines Overview

This section displays actions applied to the selected one or many lines.

Field or Control	Description
Item Description	Click the Item name to view the item description page.
Line Comments	Select to access the Requisition Line Comments and Attachments page.
Quantity	Displays the quantity of the line item. Note: If the Amount Only toggle is set to <i>Yes</i> for any requisition line, the Quantity value is set to 1 and becomes display only for that line.
Unit of Measure	The unit of measure in which the item is purchased.
Price	Displays the item price per unit.
Currency	Displays the currency of the price.
Total	Displays total price for the items on that line.
 View Details icon	Select to access the Requisition Line Details - Schedule Details and Line Details Page .

Requisition Line Details - Schedule Details and Line Details Page

Use the Requisition Line Details (PV_REQ_SCH_DIS_SCF) page to view the requisition line and schedule details for the selected line item.

Navigation:

Employee Self Service > eProcurement > My Requisitions > Action > Inquiry.

Click View Details icon for any of the item.

This example illustrates the fields and controls on the Requisition Line Details - Schedule Details page. You can find definitions for the fields and controls later on this page.

Order Total 20,000.00 USD

Requisition ID 000000175

Requisition Name 000000175

Requisition Date 06/23/2024

Line 1

Schedule Details

Line Details

Item Summary



Sun Server

Item ID AM1003

Item Category Computer Equipment

Supplier ID

Supplier Location

Supplier Item ID

Lead Time Days 0

Price 20000

Quantity 1 Each

Total Amount 20,000.00 USD

Buyer VP1 Kenneth Schumacher

Manufacturer

Manufacturer's Item ID

UPN Type

UPN ID

Attribute

Catalog Item

Schedule 1

Schedule 1

Ship To US001

Attention To Kenneth Schumacher

Due Date

Address 144 North Street New York, NY 10108

Quantity 1

Price 20,000.00

Total 20,000.00

Ship To Comments

Price Adjustments

Distributions

Distribute By Amount

Chartfields1

Chartfields2

Chartfields3

Details

Budget Information

Asset Information

Show All

Distribution Line %

Status %

Dist Type %

Location %

Percent %

Merchandise Amount %

GL Business Unit %

Open Amount %

1

Open

US001

100

20000.00

US005

20000.00

Requisition Line Details page displays the Order total amount, Requisition ID, Requisition name, and Requisition Date.

Note: This page is view only when accessed from the My Requisition page.

Item Summary

Item Summary displays item information, such as Item Image, Item ID, Item Category, Supplier ID, Supplier Location, Supplier Item ID, Lead Time Days, Price, Quantity, Total Amount, Buyer, Manufacturer, Manufacturer's Item ID, UPN Type, and UPN ID.

If you have substitute items defined for the original item, displays the original Item ID on the transaction line that was replaced when a Substitute Item was found. Once the field is populated, the original Item ID will not be overridden with another Item ID. If the Item ID field is changed directly by the Requester or Buyer, the Original Substituted Item field is cleared. Similarly, if the Supplier ID/ Location field is changed by the Requester or Buyer, then the value in the Original Substituted Item field is cleared and the value is moved back to the Item ID field. The substitute items icon helps the Requester or Buyer to know whether the item has been substituted. This appears on a transaction line whenever the Original Substituted Item field is populated. If Original Substituted Item and Description fields are already displayed in the component, i.e. Requisition and PO, a text ‘Substitute Item in Use’ will appear.

Requisition Line Details - Schedule Details

Use the *Next* or *Previous* icon on the top right to review each line item.

Field or Control	Description
Ship To	The location code that indicates the location where the supplier should deliver the items.

Field or Control	Description
Attention To	Displays the name of the individual who should receive the items or services on this requisition line.
Due Date	The date the requester would like the items to arrive at the Ship To location.
Address	Displays the shipping address of the item.
Quantity	Displays the total requested quantity.
Price	Displays price of each item.
Total	Total price of the number of items requested for that line.
Schedule VAT	Click the Schedule VAT icon to access the VAT Information for Schedule page, where you can review value added tax (VAT) information for the schedule line. The icon does not appear when the Calculate VAT on Req check box at Purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment , or the VAT_ DETAILS eProcurement role action is not used and the user eProcurement role is not added to the user ID profile. Using this page, you can override the recovery percentage and rebate percentage, and recalculate or reset VAT defaults changes that are made to VAT determinants. See “Understanding VAT” (PeopleSoft Global Options and Reports).
	Click Ship to Comments button to view comments and attachments.
	Click Price Adjustments button to view the price adjustments for the schedule.

PO Information

This link appears if the requisition item is sourced to PO. Click this link to view the PO information that opens in a secondary page.

Field or Control	Description
Receipt Status	Displays the receipt status for this PO. Values include: <i>PO Not Received:</i> No quantities for this PO line have been received. <i>PO Partially Received:</i> Part or all quantities for this PO line have been received. Even if the quantity is fully received, the status does not change until you run the Match Request process in PeopleSoft Payables. <i>PO Received:</i> All quantities for this PO line have been received. Run the Matching process (AP MATCHING) in PeopleSoft Payables.
View Receipt	Click the View Receipt button to access the Receipt For a Casual User page. This button appears if a receipt was recorded for this line.

Requisition Line Details - Distribution Details

Distribution displays Accounting Tag information, ChartFields, and access Budget and Asset information.

Field or Control	Description
ChartField	ChartField Display Templates are used to extend ChartField configuration to control the display of individual ChartFields on PeopleSoft Fluid components. It displays ChartFields in a consistent manner on PeopleSoft Fluid transaction pages across PeopleSoft products.
Distribution VAT	Click the Distribution VAT icon to access the VAT Information for Distribution page, where you can review value added tax (VAT) information for the distribution line. This button only appears when the Calculate VAT on Req check box for Purchasing business unit is selected, the purchasing business unit is using a VAT environment, or the VAT_DETAILS eProcurement role action is used.
	Click to view the exchange currency information and the exchange rate.
	Click to view the Custom Fields for Line 1 and Schedule 1 and Distribution 1 page that opens in a pop-up window. The custom field values appearing on this page are display only.

Chartfields

Chartfields displays the distribution line details.

Field or Control	Description
Distribution Line	Displays the number the system assigned to this distribution. The system uses this numbering to distinguish between multiple distributions for a single requisition line.
Status	Distribution statuses include: <i>Open</i> : The distribution line is open. <i>Complete</i> : The distribution line is closed. <i>Processed</i> : The distribution line has been processed and is unavailable for sourcing. <i>Canceled</i> : The distribution has been canceled.
Dist Type	Displays the distribution type that was selected for the requisition line. Values are <i>Labor</i> and <i>Expense</i> .
Merchandise Amount	Displays the supplier's unit price and currency for the item, which are assigned on the Supplier's UOM & Pricing Info (supplier's UOM and pricing information) page.

Know more about delivered Chartfields in eProcurement, see [Delivered ChartFields](#).

Details

Details tab displays Affiliate, Fund Affiliate, Operating Unit Affiliate, IN Unit, Stat, Open Quantity, Merchandise Amount Base, and Currency details.

To know more about these fields, see [Delivered ChartFields](#).

Budget Information

Field or Control	Description
Budget Status	When Commitment Control for purchasing is enabled, displays the distribution line results after budget checking is initiated. Values for the field include: • <i>Not Chk'd</i>: The requisition has not been budget checked or budget processor has not processed requisition monetary amount changes. • <i>Valid</i>: The requisition passed budget checking and the budget processor has updated the control budget ledger. • <i>Error</i>: The requisition failed budget checking. • <i>Warning</i>: The requisition passed budget checking but with warning messages. It could be that the requisition amount exceeded budget amount but it is still within the budget tolerance. For more examples of Warning and Error, see “Understanding Commitment Control and General Ledger Journals” (PeopleSoft General Ledger). • <i>Bypass</i>: The requisition distribution is not subject to budget checking for any of the commitment control ledger groups that are assigned to the General Ledger business unit. Budget processor will set the budget line status to <i>Bypass</i> for a transaction line that is not subject to budget checking.
Pre-Encumbrance Balance	Displays the pre-encumbrance balance for this requisition distribution after it is successfully budget checked. Click the Pre-Encumbrance Balance amount hyperlink to view requisition accounting entries for this distribution only. You can use this page to view accounting information details including the commitment control ledger group and transactions that have been performed against this requisition distribution. When this requisition line and distribution is sourced to a purchase order and budget checked, commitment control liquidates the pre-encumbrance balance from this requisition distribution and establishes an encumbrance for the purchase order.
Currency	Displays the currency code for the pre-encumbrance amount at the distribution level of the requisition. The currency code is based on the commitment control ledger group for the distribution level General Ledger business unit.
Pre-Encumbered Base Balance	Displays the pre-encumbrance balance in requisition base currency.

Field or Control	Description
Business Unit Base Currency	Displays the base currency of the pre-encumbrance balance on the business unit.
Commitment Control Close Flag	Displays as selected when the Purchase Order associated with the requisition is finalized for less, thus indicating that the outstanding pre-encumbrance has been fully liquidated. This flag also displays as selected when the requisition distribution has been canceled. When the requisition is closed and remaining pre-encumbrance amount liquidated on the budget, this flag displays as selected on the requisition distribution.

Asset Information

Field or Control	Description
AM Business Unit	Displays the Asset Management Business Unit.
Profile ID	Displays the default asset profile ID associated with distribution items.
Tag Number	If you use tags to track assets, enter the tag number assigned to the asset.
CAP #	The CAP identification ties the asset to a capital acquisition plan.
Sequence	Displays the sequence number for the capital acquisition plan.
Empl ID	Employee ID of the custodian for this distribution item.
Capitalize	Select to designate this item as a capitalized item. If the item is capitalized, it can be depreciated before the order is paid.
Cost Type	Displays the default cost type associated with the item purchase, if applicable. Cost types represent components of the cost of an asset, such as materials, labor, and overhead.

VAT Details For Distribution Page

Use the VAT Details for Distribution page (PV_MOB_DIS_VAT_SCF) to review value added tax (VAT) information for the distribution line.

The page does not appear when the **Calculate VAT on Req** check box at the Purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment, or the VAT_DETAILS eProcurement role action is not used. Using this page, you can override the recovery percentage and rebate percentage, and can recalculate or reset VAT default changes that are made to VAT determinants.

Navigation:

Click the **Distribution VAT** icon on the Requisition Details page.

Use this page to view VAT details at the distribution line level. Information that appears on the page relates to the requisition line number item and the schedule that you selected on the Manage Requisitions page. The page does not appear when the **Calculate VAT on Req** check box at the Purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment, or the VAT_DETAILS eProcurement role action is not used. Using this page, you can override the recovery percentage and rebate percentage, and can recalculate or reset VAT defaults changes that are made to VAT determinants.

VAT Defaults

Field or Control	Description
Use Type	Determines VAT recoverability. The field value is retrieved from the VAT default hierarchy, but you can override this value. Use type is a type of activity in which a purchased good or service will be used and, therefore, to determine a recoverability percent and a rebate percent (when applicable) that is applied to a transaction line. Activities are categorized as taxable, exempt, or mixed. Where activity is mixed, you can associate either the ratio of taxable activity to exempt activity directly with the use type, or you can indicate that this ratio is determined at the ChartField level.
Apportionment Control	Displays the business unit that you want to control the VAT apportionment. This value appears by default from the Purchasing business unit. VAT apportionment is the mechanism that enables you to specify the ratio of taxable activity to exempt activity for individual ChartFields.
Recovery Source	Select whether the VAT recovery is <i>Automatic</i> or <i>Manual</i>. This value appears by default from the Purchasing business unit. If you select <i>Manual</i>, enter a value in the Recovery Percent field.
Rebate Source	Select whether the VAT rebate is <i>Automatic</i> or <i>Manual</i>. This value appears by default from the Purchasing business unit. If you select <i>Manual</i>, enter a value in the Rebate Percent field.

Field or Control	Description
Treatment	Controls default and transaction behavior. A description of how the transaction must be treated for VAT purposes. This value is used to determine how VAT defaults are applied, what accounting entries are required, and how and if the transaction is reported on the VAT return. You can override the values in this field. The VAT defaulting hierarchy determines the value of this field based on the country in which the service is deemed to have been performed, and the countries in which the bank and beneficiary are located and registered.
VAT Code	Select a value to specify the rate at which VAT is calculated. The VAT code used to define a percentage the system uses to determine the VAT amount. The VAT code is similar to the sales and use tax code, with a few exceptions. The tax authority tied to the VAT code generally consists of a single authority, and the ChartFields for a VAT code do not reside with the tax authority but are determined by the combination of the VAT code, VAT account type, and VAT transaction type.
Transaction Type	Select a value to categorize VAT transactions according to particular VAT accounting and reporting requirements. The VAT code and the VAT transaction type are used in conjunction with the VAT account type to obtain the ChartFields for accounting entries.

VAT Calculations

Field or Control	Description
Transaction Amount	VAT amount in the transaction currency.
Transaction Amount Base	VAT amount in the base currency.
Basis Amount	VAT basis amount in transaction currency.
Basis Amount Base	VAT basis amount in the base currency.
Tax Rate	Displays the rate at which this item is taxed.

Field or Control	Description
Recorded Amount	Displays the amount of VAT calculated for the schedule in the transaction currency.
Recorded Amount Base	Displays the amount of VAT calculated for the schedule in the base currency.
Recovery Percent	Displays a system-calculated value based on the selected VAT use type. You can override the automatic value if the VAT Allow Override Recovery/Rebate field on the business unit indicates that manual override is allowed. This value must be less than or equal to 100 and a positive number. To access the field, select eProcurement > Procurement Application Admin > Maintain Business Units > Processing Options and click the Set VAT Default link.
Rebate Percent	Displays a system-calculated value based on the selected VAT use type. You can override the automatic value if the VAT Allow Override Recovery/Rebate field on the business unit indicates that manual override is allowed. This value must be less than or equal to 100 and a positive number. To access the field, select eProcurement > Procurement Application Admin > Maintain Business Units > Processing Options and click the Set VAT Default link.
Recovery Amount	VAT recovery amount in the transaction currency.
Recovery Amount Base	VAT recovery amount in the base currency.
Rebate Amount	Calculated VAT rebate amount in the transaction currency.
Rebate Amount Base	Calculated VAT rebate amount in the base currency.

Requisition Line Details - Line Details

This section displays additional details for a line, such as the buyer, supplier, and other line-specific information.

Navigation:

Select Line Details on the Requisition Line Details page

This example illustrates the fields and controls on the Requisition Line Details - Line Details page. You can find definitions for the fields and controls later on this page.

Requisition Line Details

Order Total: 20,400.00 USD

Requisition ID: 0000000175 Requisition Name: 0000000175 Requisition Date: 06/23/2024

Line 1

Schedule Details Line Details

Item Summary

 **Sun Server**

Item ID: AM1003 Physical Nature: Goods

Item Category: Computer Equipment Buyer: VP1

Original Substituted Item: Sun Server **Buyer Information**

Long Description: Sun Server

Price: 20000

Quantity: 1 Each

Total Amount: 20,000.00 USD

Attributes

 Catalog Item

Item Additional Information

> Contract Information

> Supplier Information

> Manufacturer Information

> Procurement Group Information

> Sourcing Controls

Field or Control	Description
Buyer	Displays buyer name.
Buyer Information	Select to access the Buyer Telephone Information window, which displays the buyers name, telephone, and fax number.
Show Configurator	Select to access the Item Configuration Information window, where you can select an Inventory Unit and Configuration Code.

Item Additional Information

Field or Control	Description
Device Tracking	Displays whether a receipt line is device tracked. See “Using Device Tracking” (PeopleSoft Managing Items)
Stockless Item, ,	Agreement has been set up with the supplier to supply this item for par inventory replenishment.
RFQ Required	Item must go through the RFQ cycle before it can be included on a purchase order.
Inspection Required	Inspection required for the item.
Amount Only	Displays Yes to indicate that the line is an amount only line.

Field or Control	Description
Auto Item Substitution	Indicate that item substitutions can be determined by the system. This is determined by Purchasing business unit.

Contract Information

This link appears if a contract ID has been assigned to the requisition line. Click this link to view contract details that opens in a secondary page.

The PeopleSoft eProcurement, PeopleSoft Purchasing, and PeopleSoft Payables applications are integrated with the procurement contract functionality to streamline the use of contracts with requisitions, purchase orders, and vouchers. As part of the contract functionality, you can set up requisitions to automatically search for a contract to use for requisitions. Applying default contract prices to requisitions enables you to receive contract prices for requisition items and to more accurately track budgets and pre-encumbrance balances.

Field or Control	Description
Contract ID	Displays the purchasing contract used to price this requisition line. The contract ID can be entered manually on the Review and Submit-Line Details page when creating and editing a requisition. A contract ID can also be added automatically by the system when you have selected the Default Contract On Req check box on the Purchasing Definition - Business Unit Options page.
Version	Displays the contract version applied to this requisition line. Multiple versions are available when you are using version control. Contract versions enable contract administrators to create and maintain multiple versions of a contract in the procurement system.
Contract Line	Displays the contract line applied to this requisition line.
Category Line	Displays the contract category line number. Categories enable you to specify groups of items on a contract, rather than having to enter the items one at a time.

Supplier Information

Field or Control	Description
Supplier ID	Displays the ID of the supplier that supply this item.

Field or Control	Description
Supplier Location	Displays the location of the supplier. The default is based on the value that is defined for the supplier.
Supplier Item ID	Displays the ID that the supplier uses to identify this item on the Item Supplier page.
Supplier's Catalog Number	Displays the Catalog Number that the supplier assigned for the item.
Item Supplier Priority	Indicates the supplier priority selected for the item. The value appears by default as a medium priority, but can be changed by the user. The updated priority appears on the Requisition Header.
Suggest New Supplier	Select this link to access the Suggested Supplier page (PV_MB_SUG_VNDR_SEC) where you can enter supplier name, address, and phone information.

Manufacturer Information

The Manufacturer information group box displays all information pertaining to the manufacturer.

Field or Control	Description
Manufacturer ID	Identifies the manufacturer of the item. This value is supplied from the Supplier's Manufacturer Info page.
Manufacturer's Item ID	Displays the identifier that the manufacturer uses for this item when the suggested supplier supplies the item. This value appears from the Supplier's Manufacturer Info page.
UPN Type	Displays UPN Type Code.
UPN ID	Displays universal product number that is defined by a unique combination of item ID, manufacturer ID, manufacturer item ID, and Unit of Measure.

Procurement Group Information

Field or Control	Description
Procurement Group ID	Displays Procurement Group ID.
Primary Unit	Indicates that this is the primary unit for the Procurement Group.
Unit Allocation Qty	Identifies the quantity allocated per asset for the Procurement Group.

Sourcing Controls

Field or Control	Description
Consolidate with other Reqs	Displays if multiple requisitions are consolidated for the same supplier into one purchase order. This is defined at requester setup.
Calculate Price	Displays Yes if the sourcing process recalculated the item price when this requisition line enters the sourcing stage.
Override Suggested Supplier	Displays Yes the sourcing process to overridden the suggested supplier. This is determined for purchasing order sourcing.
Inventory Source Flag	Displays whether eligible requisition items are sourced from PeopleSoft Inventory, which is determined in user preferences.
Auto Item Substitution	Indicates that item substitutions can be determined by the system. This is determined by Purchasing business unit.

My Requisition - Edit Requisition Page

Use the Edit Requisition page (PV_MOB_NEW_CHEKOUT) to review the contents of the requisition, make final adjustments to quantity, UOM, add last-minute items to the requisition, and to place orders.

Navigation:

Employee Self Service > eProcurement > My Requisitions. Select the Action icon and then select Edit.

This example illustrates the fields and controls on the Edit Requisition page (1 of 2). You can find definitions for the fields and controls later on this page.

Edit Requisition

Continue Shopping

Save

Submit

Checkout for Requisition ID 0000000175

Order Total 20,520.00 USD

Pre-Encumbrance Balance 20520.00 USD

[Pre Encumbrance Details](#)

Requisition Summary

Business Unit US001 US001 NEW YORK OPERATIONS

Requisition Name 0000000175

Requester VP1 Kenneth Schumacher

Currency USD

Header Comments

Add Request Document

Priority Medium

Card Number

Expiration Date

Use Procurement Card

Budget Check Status Valid

Budget Details

Check Budget

Pre-Check Budget

Additional Fields

Custom Field 1

Custom Field 2

Custom Date

Custom Field 3

Custom Field 4

Custom Character 1

Custom Character 2

This example illustrates the fields and controls on the Edit Requisition page (2 of 2). You can find definitions for the fields and controls later on this page.

Justification Comments

Requisition Lines Overview

Select All

Actions

3 rows

Line 1 Catalog Item

3 Season Mummy Bag, Long

Item ID 10037

Supplier Deliz

Line Comments

Delete

Status Approved

Quantity 2

Unit of Measure EA

Price 120.00

Currency USD

Total 240.00 USD

ScheduleDetails

Line 2 Catalog Item

Sun Server

Item ID AM1003

Supplier Midton Computer Supplies

Line Comments

Delete

Status Approved

Quantity 1

Unit of Measure EA

Price 20,000.00

Currency USD

Total 20,000.00 USD

ScheduleDetails

Line 3 Catalog Item

17 inch LCD Display Computer Monitor; Analog/Digital,

Item ID DSS_MONITOR_17

Supplier Midton Computer Supplies

Line Comments

Delete

Status Approved

Quantity 1

Unit of Measure EA

Price 280.00

Currency USD

Total 280.00 USD

ScheduleDetails

Order Total 20,520.00 USD

Pre-Encumbrance Balance 20520.00 USD

[Pre Encumbrance Details](#)

Field or Control	Description
Item Description	Click the item description link to view the item details. For Catalog items, the details are read-only, whereas you can modify the details of Punchout items, Special Request items, Fixed Cost items, and Time and Materials items. Note: If a requisition has been sourced, you will not be able to change the Quantity and UOM field values on the Checkout page. The values can be modified on the Schedule Detail page.

Field or Control	Description
Quantity	Modify the quantity if required.
UOM	Modify the UOM if required.
VAT Amount (value added tax amount)	Displays the amount of value added tax (VAT) calculated on a VAT-enabled requisition. It does not appear when the Calculate VAT on Requisition check box at Purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment, the VAT_DETAILS eProcurement role action is not used, and the user eProcurement role is not added to the user ID profile. In addition, for Purchasing Requisition in a VAT enabled Business Unit, VAT Amount and icon also do not appear when the User ID Preferences - Requisition Authorizations for Allowed Requisition Actions of View/Override VAT Details is not selected.
Pre-Encumbrance Balance	Displays the pre-encumbrance balance amount after requisition is successfully budget checked. When you use commitment control, the system deducts each type of financial obligation from the budget and tracks it according to obligation type. This enables you to determine the money that you have committed in pre-encumbrances. The system extracts these values from commitment control tables by passing the business unit, document ID, and other key information that depends on the display. The system displays this field only when commitment control for purchasing is enabled and if the document has been budget checked successfully at least once. In addition, a default commitment detail ledger must be selected on the Ledgers For A Unit – Commitment Control Options page so that the accounting entries can be summarized to display the respective pre-encumbrance balance for the requisition. Pre-encumbrance balance appears in the transaction currency of the requisition and is based on the transaction budget date, general ledger unit, and commitment control ledger group. Pre-encumbrance balance can be partially or fully liquidated from purchase orders. Click the Pre-Encumbrance Balance amount hyperlink to view Requisition Accounting Entries. You can use this page to view accounting information details including the commitment control ledger group and transactions that have been performed against the requisition.
Delete	Click to delete selected requisition lines. You cannot delete a requisition line that has been sourced to a purchase order. You cannot use this button to delete a requisition line that has not passed budget checking when Commitment Control is used.
Save	Click to save the requisition for later review or submission.

Field or Control	Description
Submit	Click to submit the requisition for approval, sourcing, and dispatching to a supplier.

The Quantity and UOM values are retained the next time the Checkout page is accessed. You have the options to continue shopping, save your modifications, and submit the requisition.

Note: Use Header Comments, Line Comments, and Ship to Comments to open the respective page where you can add or delete one or more supporting documents and comments. The system displays an error message if you try to load more than the number of attachments specified on the “Installation Options - Multiple Attachments Page” (Application Fundamentals) for Purchasing product.

Note: If you have changed a requisition, upon submission, the Change Request/Line Approval Summary page is displayed with the details such as, line number, item description, change request status. The Line Re-Approval details are displayed only if the required Approval Framework Control options are selected on the Purchasing Definition - Req Change Options page.

Using Special Requests and Express Forms to Create Requisitions

Understanding Special Requests and Express Forms

This section provides overviews of special requests, express forms, and express item entry.

Special Requests

To create a requisition for an item that is not included in the standard catalog of items in PeopleSoft eProcurement and has no item ID, you can enter a special request. After you submit the requisition, the special request item is routed for approval.

When you enter a special request in the Special Request component, specify the type of item that you are requesting. This enables the system to tailor the fields to match the needs of the item.

You can request two types of items:

- Special items, which are physical items.
- Services, which are tasks that are performed by outside agents. For example, package, delivery, temporary help, and repair work.

Note: If you know the PeopleSoft item ID, use the Search or Advanced Search options to request the item.

Using a Negative Price on Special Request Pages

You can create a special request item or service with a negative price. This feature enables you to record trade-in items or special discount offers such as instant rebates and special coupon offers. You can enter a negative price item within PeopleSoft Purchasing and PeopleSoft eProcurement; however, negative prices cannot be entered in PeopleSoft Services Procurement. Using the Special Requests pages in PeopleSoft eProcurement, you can enter the negative value in the following fields:

- The Price field on the Special Item page.
- The Value of Service field on the Special Request - Fixed Cost Service page.
- The Rate field on the Special Request - Variable Cost Service page.
- The Rate field and the Price field on the Special Request - Time and Materials page.

A requisition with a negative price item can be sourced to a purchase order and dispatched to a supplier, then the items can be received into PeopleSoft eProcurement. When using a negative price item, the following points apply:

- The total price amount of the requisition can be negative or you can just have one or more requisition lines with negative prices.
- The Supplier ID is not a required field when entering a negative price item.
- You cannot source a requisition containing a negative price item to PeopleSoft Inventory. You can only source to a purchase order. In other words, on the REQ_LINE, the INVENTORY_SRC_FLG is set to the value of *N* (no) and disabled.
- A negative price item cannot be sourced into a request for quote (RFQ) or to PeopleSoft Strategic Sourcing.
- A negative price item cannot be partially sourced. The item quantity cannot be split into multiple lines and sourced separately.
- When the PO Calculations process (PO_POCALC) is run, a requisition line containing a negative price item is not repriced to match the system price or consolidated with other requisitions. In other words, on the REQ_LINE, the CALC_PRICE_FLG and the CONSOLIDATE_FLG are both set to the value of *N* (no) and disabled.
- Contract pricing is not applied to a requisition line with a negative price.
- The price tolerance fields are disabled so that a requisition containing a negative price item is not rejected. These fields are Tolerance/Tolerance Under, % Unit Price Tolerance, and Unit Price Tolerance.

Negative price items can be added to the favorites list or a personal template to be used again on another requisition. In addition, you can copy a requisition with one or more negative price items using the copy action on the Manage Requisition page.

Express Forms

Express forms enable employees to use a standardized form to order products that might need additional supporting information. For example, when ordering business cards, you must give the name, job title, phone number, and other information that varies by individual but would follow the same format.

You design the express form page that employees use by creating a record definition with the specific fields for that product. You can have as many express forms as you need. For example, you might design one express form for business cards and another for catering services. You can also use inquiry versions of the forms to display orders without allowing editing.

When the requester selects an express form for the requisition, a page appears where he can enter additional information that is needed to order the item. The requester completes this page, and the information is saved for the supplier.

Suppliers can access the purchase order (PO) by using PeopleSoft eSupplier Connection. Using the application, they can access the PeopleSoft database and view the POs and the actual express form.

Express Item Entry

Express Item Entry enables requesters to quickly add items to a requisition using a simple form. Requesters can enter item details such as item description and quantity and add it to the cart. Requesters can use the Supplier Information and Item Information tabs on this page to view or edit supplier and item information.

Common Elements Used in Special Requests and Express Forms to Create Requisitions

<i>Field or Control</i>	<i>Description</i>
# of Units of Work (number of units of work)	Enter the time that is needed to complete service based on the unit of work. For example, 2 hours or 6 days.
Add Item	Click to save data that is entered as a requisition line.
Beginning Date	Enter the date that the service should be started. This date appears in the Line Comments sections on the requisition and the purchase order.
Category	The item category to which this item or service belongs. This category ID enables the system to retrieve default values for the requisition and purchase order.
Date of Completion	The date that the services should be completed. This date appears in the Due Date fields on the requisition and the purchase order.
Forms	Select to access the express forms that have been defined for use.
Item Description	A brief description of the item that is needed. This description appears on the purchase order that is sent to the supplier.
Additional Information	Enter additional information that help describe or support a special request. Determine whether this additional information are sent to the supplier, printed on the receipt, or printed on the voucher.
Price	The unit cost of the item based on the currency used. This price can be a negative value on the Special Item page.
Quote Date	The date of the written quote from the supplier. This date appears in the Line Comments sections on the requisition and the purchase order.
Quote Number	The number of the written quote, if any, that is provided by the supplier. This number appears in the Line Comments sections of the requisition and the purchase order.

Field or Control	Description
Rate	The unit price for this service based on the unit of work. This rate can be a negative value on the Special Request - Variable Cost Service page or the Special Request - Time and Materials page.
Send to Supplier	Select to send the additional information that you entered to the supplier.
Service Description	A brief description of the service that is needed (up to 254 characters). This description appears on the purchase order that is sent to the supplier.
Show at Receipt	Select to display the additional information that you entered on receipt.
Show at Voucher	Select to display the additional information that you entered on the voucher.
Special Request	Select this tab to access a list of special requests for goods and services.
Unit of Measure	Enter the default unit of measure for this express form item. This is used on the requisition.
Units of Work	The time-based unit of measure that is used for the service that is provided, for example, hour or day.
Value of Service	Enter the cost of this service. This amount is saved on the requisition line with the quantity <i>1</i> and the unit of measure <i>Each</i> . This cost can be a negative value on the Special Request - Fixed Cost Service page.
Supplier ID	Enter the identification number of the supplier of this item. The supplier ID is from the PeopleSoft supplier tables. You can enter a partial value and select the supplier Lookup icon (magnifying glass) to access the Supplier Search page where you can select the correct supplier.
Supplier Name	Enter the supplier name or partial name to search for the supplier, then select the Supplier Lookup icon (magnifying glass) to access the Supplier Search page where you can select the correct supplier.
Supplier Lookup	Click to access the Supplier Search page, where you can search for and suggest a particular supplier. If you do not name a supplier, the buyer can add one later.

Requesting Special Items

This section discusses how to add a special request for items to a requisition.

Page Used to Request Special Items

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Special Requests Page</u>	PV_MOB_SPECIAL_REQ	Add a special request for items not found in the item catalog to a requisition.

Special Requests Page

Use the Special Requests page (PV_MOB_SPECIAL_REQ) to add a special request for items not found in the item catalog to a requisition.

Navigation:

eProcurement > Create Requisition > Special Requests

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

Use this page to order goods that are not listed in a catalog.

Field or Control	Description
Request New Item	Select this check box to request the item to be added to the item master. When this option is selected, a request new item worklist notification is sent based on the following conditions: • If workflow approval is required and the requisition is approved, a worklist notification is sent to all users that have the Item Notification (ITEM_NOTIFICATION) role action. • If workflow approval is not required and the requisition is saved and submitted, a worklist notification is sent to all users that have the Item Notification role action. When the requisition is saved and submitted, the status of the new item request appears in the Request New Item group box and has a value of <i>Pending</i>. The authorized user can approve or reject the item request by using the eProcurement New Item Request page. When the new item request is approved, the SetID and the item ID are specified on the eProcurement New Item Request page. The requester receives an email notification when the item is created or rejected and the status changes to <i>Created</i> or <i>Denied</i>. If the new item request is approved, the SetID and the item ID are included on the email notification. See Maintaining System Users and Roles. See eProcurement Business Unit Options Page.
Add to Cart	Click this button to add the special item that you have entered to the requisition.

The Amount Only check box is displayed only if the requester has the AMT_ONLY_SPECIAL_REQ role action assigned and enabled.

For more information on Amount only, see [Line Details Page](#).

If the SPECIAL_REQUEST_ITEM_SEARCH role action is enabled, when user selects the Add to Cart button, then the Search Framework uses the item description from Special Request item to find matching catalog items and displays them on the search results. User then have the option to either select the matching catalogs item to Add to Cart or continue to add Special Request item to cart. If there are no matching catalog items found, then the system adds Special Request item to the cart as it is.

If the SPECIAL_REQUEST_ITEM_SEARCH role action is disabled, when user selects the Add to Cart button, then the Search Framework is bypassed and the system adds Special Request item to the cart as it is.

Note: Special Request functionality performs in the same way for the Fluid Special Request page.

Related Links

[Creating Requisitions](#)

[Creating Requisitions Using the Fluid User Interface](#)

Requesting eProcurement Services

This section discusses how to request a fixed-cost service, request a variable-cost service, and request a time and materials form.

Pages Used to Request eProcurement Services

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
ePro Services Page	PV_REQ_SERVICES	Select required Service.
<u>eProcurement Services - Fixed Cost Service Page</u>	PV_MOB_SVC_FC_FL	Request a fixed-cost service. This is a service with a fixed fee and is not part of the standard item catalog for PeopleSoft eProcurement.
<u>eProcurement Services - Variable Cost Service Page</u>	PV_MOB_SVC_VC_FL	Request a variable-cost service that is based on the number of hours of work.
<u>eProcurement Services - Time and Materials Page</u>	PV_MOB_SVC_TM_FL	Request a time and materials form for services.

eProcurement Services - Fixed Cost Service Page

Use the eProcurement Services - Fixed Cost Service page (PV_MOB_SVC_FC_FL) to request a fixed-cost service.

This is a service with a fixed fee and is not part of the standard item catalog for PeopleSoft eProcurement.

Navigation:

Click the **Fixed Cost Service** link on the ePro Services page.

This example illustrates the fields and controls on the eProcurement Services — Fixed Cost Service page.

The screenshot shows the 'Create Requisition' page for 'Fixed Cost Service'. The page is divided into three main sections: a left sidebar, a central form area, and a right sidebar.

Left Sidebar: Contains navigation links: Browse Catalogs, Item History, Favorites, Templates, Punchouts, Special Requests, **Fixed Cost Service** (highlighted), Variable Cost Service, Time and Materials, Order Sheets, Express Entry, and Express Forms.

Central Form Area:

- Service Information:**
 - *Service Description: Text input field with a character count of 254 characters remaining.
 - *Price: Text input field.
 - *Category: Text input field with a search icon.
 - Start Date: Date picker.
 - *Currency Code: Text input field with 'USD' selected and a search icon.
 - Amount Only: Toggle button.
 - End Date: Date picker.
- Supplier Information:**
 - Supplier ID: Text input field with a search icon.
 - Supplier Location: Text input field with a search icon.
 - Quote Number: Text input field.
 - Quote Date: Date picker.
- Comment:**
 - Comment Text: Text area with a copy icon.
 - Checkboxes:
 - ☐ Send Comment to Supplier
 - ☐ Show Comment on Receipt
 - ☐ Show Comment on Voucher

Right Sidebar:

- Cart:**
 - Text: 'Your cart is empty. Please add items to the shopping cart.'
 - Illustration of a person with a shopping bag.

Top Bar:

- Search bar with 'All' dropdown and search icon.
- *Type: Standard dropdown.
- Checkout button.

Bottom: An 'Add to cart' button with a shopping cart icon.

This type of service is a one-time event for a flat rate.

Note: The Amount Only toggle button is displayed only if the requester has the AMT_ONLY_SERVICES role action assigned and enabled. By default, this button is set to No.

eProcurement Services - Variable Cost Service Page

Use the eProcurement Services - Variable Cost Service page (PV_MOB_SVC_VC_FL) to request a variable-cost service that is based on the number of hours of work.

Navigation:

Click the **Variable Cost Service** link on the ePro Services page.

This example illustrates the fields and controls on the eProcurement Services - Variable Cost Service page.

Create Requisition

AllSearchType StandardCheckout

Browse Catalogs

Item History

Favorites

Templates

Punchouts

Special Requests

Fixed Cost Service

Variable Cost Service

Time and Materials

Order Sheets

Express Entry

Express Forms

Variable Cost Service

Service Information

*Service Description

254 characters remaining

*Rate

*Number of Units of Work

*Category

Start Date

*Currency Code

USD

*Unit of Work

Amount Only

End Date

Supplier Information

Supplier ID

Supplier Location

Quote Number

Quote Date

Comment

Comment Text

Send Comment to Supplier

Show Comment on Receipt

Show Comment on Voucher

Add to cart

Cart

Your cart is empty.

Please add items to the shopping cart.

This type of service is a contractual agreement that is based on the number of hours of work. For example, the cost to hire temporary help is usually based on the hours worked.

The number of hours on this page is an estimate. The total price is uncertain until the job is complete. For example, the cost to hire temporary help is usually based on the hours worked.

Note: The Amount Only toggle button is displayed only if the requester has the AMT_ONLY_SERVICES role action assigned and enabled. By default, this button is set to No.

eProcurement Services - Time and Materials Page

Use the eProcurement Services - Time and Materials page (PV_MOB_SVC_TM_FL) to request a time and materials form for services.

Navigation:

Click the **Time and Materials** link on the ePro Services page.

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This example illustrates the fields and controls on the eProcurement Services - Time and Materials page (1 of 2).

Create Requisition

Search: [All] [Search] [Filter] [Type: Standard] [Checkout]

Time and Materials

Time

Service Information

*Service Description [254 characters remaining]

*Rate [] *Currency Code [USD]

*Number of Units of Work [] *Unit of Work []

*Category [] Amount Only []

Start Date [] End Date []

Supplier Information

Supplier ID [] Supplier Location []

Quote Number [] Quote Date []

Comment

Comment Text []

☐ Send Comment to Supplier
☐ Show Comment on Receipt
☐ Show Comment on Voucher

Cart

Your cart is empty.
Please add items to the shopping cart.

This example illustrates the fields and controls on the eProcurement Services - Time and Materials page (2 of 2).

Create Requisition

Search: [All] [Search] [Filter] [Type: Standard] [Checkout]

Materials

Item Information

*Item Description [254 characters remaining]

*Price [] *Currency Code [USD]

*Quantity [] *Unit of Measure []

*Category [] Amount Only []

Start Date [] End Date []

Supplier Information

Supplier ID [] Supplier Location []

Supplier Item ID []

Manufacturer Information

Manufacturer ID [] Manufacturer's Item ID []

Comment

Comment Text []

☐ Send Comment to Supplier
☐ Show Comment on Receipt
☐ Show Comment on Voucher

[Add to cart](#)

Cart

Your cart is empty.
Please add items to the shopping cart.

This type of service is a contractual agreement that is based on the number of hours worked and the materials used, for example, expenses that include parts and labor for equipment repairs.

Note: The Amount Only toggle button is displayed only if the requester has the AMT_ONLY_SERVICES role action assigned and enabled. By default, this button is set to No.

Related Links

[Create Requisition — Special Requests Page](#)

Creating Express Forms

To create express forms, use the Express Form Profile component (PV_EXP_APP_PROFILE).

This section provides an overview of how to create express forms using Supplemental Data Framework (SDF) and Application Designer. It also discusses how to link express forms to PeopleSoft eProcurement.

Page Used to Create Express Forms

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Express Form Type Page	PV_EXP_APP_PROFILE	Link express forms to PeopleSoft eProcurement.
Maintain Supplemental Data Page	PV_SDF_OPTIONS	Provide access to Supplemental Data Framework.

Understanding How to Create Express Forms

To create an express form:

1. Create a record definition in PeopleSoft PeopleTools with all the fields that you want on the express form.

This record definition is created for a PeopleSoft application. The definition is made up of a rowset name and a record name and a group of child records that make up the fields for the express form page that users access to order forms. You can also hard code values into the rowset.

The rowset name must be named &RS_REQ_ITEMS and the record must be named PV_EXT_ITEM_WRK. Required fields for the record include:

- PRICE_REQ.
- QTY_REQ.
- CURRENCY_CD.
- UNIT_OF_MEASURE.
- CATEGORY_ID.
- DESCR254_MIXED.

2. Use a subpanel with the required fields to enter a requisition. It is attached to the record definition from step 1.

Enter a default value for these required fields to be used if the requester does not enter a different value.

3. Build the SQL table from the record definition and create the page definition.

This defines the fields and layout of the express form itself. Enter all of the fields that you want the user to be able to complete. Be sure to include quantity and amount fields.

4. Copy the page that you just created and save it as an inquiry page.

The sample business card express form uses the PV_EXP_APP_PROFILE record. This provides a display-only page for the express form. Records that you create can be edited only by appropriate users and at appropriate points in the procurement process. To access the page, select **eProcurement > Administer Procurement > Maintain Supplier Integration > Maintain Supplemental Data** for supplemental data framework. Select **eProcurement > Administer Procurement > Maintain Supplier Integration > Maintain Express Form Profile** for application designer form.

5. Define the component definition.

The business card express form example uses PV_EXP_APP_PROFILE.

The business card supplemental data card example uses PV_SDF_OPTIONS.

6. Copy the page that you created and save it as an inquiry component.
7. Add the two components to an existing menu definition.
8. Use the Express Form Type page to link the two express forms delivered to the PeopleSoft eProcurement user interface.

To access the page, select **eProcurement > Administer Procurement > Maintain Supplier Integration > Maintain Express Form Profile**. Make sure that you select the **Activated?** check box to activate the express form.

To access supplemental data framework, select **eProcurement > Administer Procurement > Maintain Supplier Integration > Maintain Supplemental Data**.

9. Enable the catalog type for the express form catalog type to establish a security setting for express forms.

Use the Catalog Types page to enable express form security. To access the page, select **eProcurement > Administer Procurement > Maintain Catalogs > Catalog Types** and select the **Enable** check box.

10. Enable menu security using permission list, roles, and user profiles.

Express form is a type of catalog security. You must explicitly give permission to users for them to access and use express forms. Also, you must assign catalog security to a business unit. To assign catalog security, select **eProcurement > Administer Procurement > Maintain Business Units > eProcurement Business Unit Actions > select EXPRESSFORM_SECURITY** and then select the business unit to which you want to apply the security.

11. Test the new express forms to ensure online functionality and data integrity by adding data to the express forms and confirming default values and prompt lists.

The ChartField should appear as a default from the setup in step 2. The account usually comes from the item category definition.

12. To retrieve the express forms in an item search or browse during requisition entry, define the express form search using the rule-based catalog maintenance feature.

This example illustrates the two sample express forms for requesting business cards in a requisition.

This example illustrates the fields and controls on the Business Card form created in Application Designer.

Business Card

Express Form Type BCRD Express Form ID NEXT

*Name

*Title

DIVISION

*Address Line 1

Address Line 2

*City

*Country

*State

*Postal Code

*Telephone

Telephone

Telephone

*Submitted By

URLID

PeopleSoft.

First Last Name
Select a Title
Select a Division

PeopleSoft USA, Inc.
12345 Main Street
City, California 99999-9999

Tel 512 999 9999 Voice 512 555 5555
Fax 512 888 8888
first_last@peoplesoft.com
http://www.peoplesoft.com

Business Card Style ID

*Business Card Quantity

Total Amount

OK Cancel

This example illustrates the fields and controls on the Business Card form created using the Supplement Data Framework.

Business Card SDF

Name

Title

DIVISION

*Address Line 1

Address Line 2

*City

*Country

*State

*Postal Code

*Telephone

Telephone

Telephone

*Submitted By

URLID

*Business Card Style ID

*Price USD

*Quantity EA

Add to Cart

*PeopleTools: Security Administration***Related Links**

“Understanding Item Control Values” (PeopleSoft Managing Items)

Express Form Type Page

Use the Express Form Type page (PV_EXP_APP_PROFILE) to link express forms to PeopleSoft eProcurement.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Maintain Express Form Profile

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

Express Form ID BCRD

Merchant Information Find | View All First 1 of 1 Last

*Effective Date 01/01/2000  ☒ Activated?  

*Description Business Cards

Supplier SetID SHARE 

Supplier ID USA0000017  Supplier Location 1 

SetID SHARE  Category ID 00001 

Unit of Measure EA  Currency Code USD 

Contact Name Joe Smith

Search Keywords BUSINESS CARDS PRINTING

Description Order customized company Business Cards 

Role Action Security

☒ Application Designer Form ☐ Supplemental Data Form

Application Designer Form

*Menu Name PV_MAIN_MENU

*Component Name PV_EF_BUSCARD

*Page Name PV_EF_BUSCARD

Inquiry Menu Name PV_MAIN_MENU

Inquiry Component PV_EF_BUSCARD_INQ

Inquiry Page Name PV_EF_BUSCARD_INQ

Image Name PV_CARD_SMALL

[Return to Administer Procurement](#)

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

Express Form ID BCRD_SDF

Merchant Information

Find | View All First 1 of 1 Last

*Effective Date01/01/1900

☒ Activated?

*DescriptionBusiness Card SDF

Supplier SetIDSHARE

Supplier IDUSA0000001

SetIDSHARE

Unit of MeasureEA

Contact NameJoe Smith

Search KeywordsBUSINESS CARDS PRINTING

DescriptionOrder Customized Company SDF Business Cards

Role Action Security

Supplier Location1

Category ID00001

Currency CodeUSD

☐ Application Designer Form

☒ Supplemental Data Form

Supplemental Data Form

*Menu NamePV_MAIN_MENU

*Component NamePV_PROCURE_REQ

*Page NamePV_EXPRESS_FORM

Inquiry Menu NamePV_MAIN_MENU

Inquiry ComponentPV_EXPFFORM_INQRY

Inquiry Page NamePV_EXPFFORM_INQ

Image NamePV_CARD_SMALL_SDF

Default Options

Quantity1000;250;500

Unit Price0.1

Form Description

Message Set Number

Message Number

[Return to Administer Procurement](#)

Use this page to link record definitions for express forms to the PeopleSoft eProcurement system. Define the page, menu, and component for the express form for both editable and inquiry-only versions. You can create different express forms for different uses and effective dates.

Note: The business card form is provided as an express form example, but it is not intended to be an express form template.

Field or Control	Description
Express Form ID	User defined form ID specified when creating the express form profile.

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Field or Control	Description
Effective Date	Defines the date on which the form is to be valid for use with PeopleSoft eProcurement.
Activated?	Select to indicate that this form is available for use.
Contact Name	Enter the contact person for this order.
Search Keywords	Enter a string of characters that can be used to search for this form. The system uses a space between strings to distinguish what makes up a string.
Role Action Security	Enter the eProcurement role action. The system uses this to further define access to the express form.

Application Designer Form

Field or Control	Description
Menu Name	Enter the menu definition for the express form page. Use this field to link the requisition Search Catalog page to the location of the express form. The menu, component, and page elements are part of a hierarchy in which each layer further defines parts of the menu.
Component Name	Enter the name of the component where the express form is located.
Page Name	Enter the record definition that you created for the express form.
Inquiry Menu Name	Enter the name of the inquiry menu definition that is used by this express form page for inquiries. Use this field to link the item description links to the location of the express form inquiry. You can view express forms using the Inquire Business Cards page. To access the page, select eProcurement > Procurement Application Admin > Maintain Supplier Integration > Inquire Business Cards .
Inquiry Component	Enter the component for express form inquiries.
Inquiry Page Name	Enter the record definition that is used for express form inquiries.

Field or Control	Description
Image Name	Enter the file name of the image that you want to display on the requisition Search Catalog page for this express form.

Supplemental Data Form

Field or Control	Description
Menu Name	Pre-populated display-only field.
Component Name	Pre-populated display-only field.
Page Name	Pre-populated display-only field.
Inquiry Menu Name	Pre-populated display-only field.
Inquiry Component	Pre-populated display-only field.
Inquiry Page Name	Pre-populated display-only field.
Image Name	Enter the file name of the image that you want to display on the requisition Search Catalog page for this express form.

Note: More than one express form can use the same page definition but not the same express form type.

Note: Use the inquiry or display-only version of the express forms to enable users and suppliers to view orders without editing them.

You can also enter search terms and a description that helps users find the express form during catalog search.

Maintain Supplemental Data

Use the Maintain Supplemental Data page (PV_SDF_OPTIONS) to provide access to the supplemental data framework (SDF) for the user to define supplemental data forms.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > Maintain Supplemental Data

This example illustrates the fields and controls on the Maintain Supplemental Data.

Menu	Description
Define Record	Define Record
Define Display Group	Define Display Group
Assign Display Group	Assign Display Group

[Return to Maintain Supplier Integration](#)

There are different levels in creating a supplemental data form. You can click the menu given and individually add values to the records and save it.

Define Record

Access the Define Record page by clicking on the Define Record menu on the Maintain Supplemental Data page. Define record values, field summary, and field detail for the form.

This example illustrates the fields and controls on the Define Record.

Record BUSCARD_SDF *Status **Activated**

Base Record REQ_LINE

Description BUSINESS CARD SDF

*Data Store Record PV_REQ_LINE_SD

☐ Recycle Cache

When you define a record the Status will be *Activated*. However you can change it to *In Design* if the record design is not complete.

Define Display Group

Access the Define Display Group page by clicking on the Define Display Group menu on the Maintain Supplemental Data page.

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

Define Display Group

Display GroupBCARD_SDFBase RecordREQ_LINE

DescriptionBusiness Card SDF

LabelBusiness Card SDF*Occurs1

Left Column

Personalize | Find | View All | First 1-5 of 14 Last

*Sequence	*Record	*Field Name	Label		
1	BUSCARD_SDF	NAME	Name	+	-
2	BUSCARD_SDF	TITLE	Title	+	-
3	BUSCARD_SDF	DIVISION	DIVISION	+	-
4	BUSCARD_SDF	ADDRESS LINE 1	Address Line 1	+	-
5	BUSCARD_SDF	ADDRESS LINE 2	Address Line 2	+	-

Right Column

Personalize | Find | View All | First 1 of 1 Last

*Sequence	*Record	*Field Name	Label		
1	BUSCARD_SDF	BUS CARD STYLE ID		+	-

Reorder

☐ Recycle Cache

Field or Control	Description
Base Record	User defined while searching for the display group. Select from the given list of base records. Depending on the Base Record Name selected, the Left column and Right Column data is populated.

Assign Display Group

Access the Assign Display Group page by clicking on the Assign Display Group menu on Maintain Supplemental Data page.

This example illustrates the fields and controls on the Assign Display Group.

Assign Display Group

Component Name PV_PROCURE_REQMarket Global

Enabled PagesFind | View AllFirst1 of 1Last

Page Name PV_EXPRESS_FORMBase Record REQ_LINE

Display GroupsPersonalize | Find | View AllFirst1 of 1Last

*Sequence	*Display Group	*Use	User-friendly Text	Edit	Clear		
1	BCARD_SDF	Editable	ExpressForms equals Business Card SDF			+	-

Reorder

☐ Recycle Cache

You can edit the sequence numbers for the display groups and reorder it. You can also define conditions for individual fields in the display group based on which the supplemental data will be displayed.

Ordering Items from Express Forms

PeopleSoft eProcurement is delivered with two express form examples of business cards. While the examples can be used to design express forms, it is not intended to be used as an express form template. The two types of forms delivered are application designer form and supplemental data form.

To order express form items:

1. Create or edit a requisition.
2. Select **Forms**.
3. Click the link for the type of form that you want to order.
4. Enter information for the form.

Fields that are marked with an asterisk (*) are required.

5. Click **OK** to save the request and access the Requisition Checkout page.
6. After adding the form to the requisition, click the description for the linked item on the Requisition Checkout page to view the order.

Page Used to Order Items from Express Forms

Page Name	Definition Name	Usage
Business Cards Page	PV_EF_BUSCARD	Enter data for express forms. When you enter the quantity of forms, the system updates the Amount field with the line total.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Business Card SDF Page	PV_EXPRESS_FORM	Enter relevant data for SDF and add it to the cart.

Related Links

[Creating Requisitions](#)

Using Express Item Entry

This section provides an overview of express item entry and discusses how to enter details for requesting express items.

Pages Used for Express Item Entry

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Express Item Entry Page	PV_EXPRESS_REQ	Use page to enter details for express items and add it to the cart. Express item entry is controlled by rule-based catalogs.

See [Requisition Settings Page](#)

See [Understanding Catalog Security](#)

See [Setting Up Catalog Security](#)

Express Item Entry Page

Use the Express Item Entry page (PV_EXPRESS_REQ) to request express items.

Navigation:

eProcurement > Create Requisition > Express Item Entry

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

Create Requisition ?

Welcome Kenneth Schumacher

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options All Search Search Advanced Search

Express Item Entry ?

Line Personalize Find View All [2] First 1 of 1 Last

Details Supplier Information Item Information FFTP

Item ID	Description	Quantity	UOM	Category	Price	Merchandise Amount
1						USD

Add to Cart

Web Oracle Exchange CDW Express Item Entry

Field or Control	Description
Item ID	Select an item ID. If the requester uses assigned catalogs, then the items that are available are limited to those items from the catalogs that they are assigned. If the requester doesn't use assigned catalogs, then all items are available.
Description	This is an open format for requesters to enter data.
Quantity	The number of items.
UOM (unit of measure)	Requesters can select from appropriate values or this can be populated from the Requisition Settings page if defaults are available.
Category	If the item is not associated with a category, this information is supplied by default from the Requisition Settings page if defaults are available. This field is also based on requesters' assigned catalogs.
Price	User entered field if Item ID is not given by the user.
Curr (currency)	This is supplied from the Requisition Settings page if defaults are available.

Managing Requisitions in PeopleSoft eProcurement

Understanding Requisition Management

The Manage Requisition feature provides you with the ability to review, edit, approve, or cancel requisitions. You can view requisitions in any status. You can only edit active requisitions that have not been sourced and do not have a status of *Complete*, or *Canceled*.

After you dispatch a requisition on a purchase order, the goods are received and the supplier is paid. The Requisition Reconciliation process (PO_REQRCON) then identifies the requisition status as *Complete*.

Maintaining Requisitions

This section discusses how to manage requisitions, view requisition details, maintain requisition distribution and accounting details, change value added tax (VAT) details for distributions, edit requisitions, and cancel or reopen requisitions.

Pages Used to Maintain Requisitions

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Managing Requisitions Page</u>	PV_REQ_STATUS	View and manage requisitions.
<u>Requisition Details Page</u>	PV_REQ_PO_DTLS	View requisition details.
Line Attachments Page	PV_REQ_APP_DATTCH	Displays the attachments added to this requisition at the line level.
Item Description Page	PV_NEWSC_ITM_DESCR	View line item descriptions.
Req Schedule One Time Address Page	PV_REQ_INQ_ADDR	Displays the details for a one-time ship to address that was added during requisition creation or edit. This page can only be accessed if a one-time address has been entered for this line and the user is not linked to the eProcurement role action of NO_ONETIME_SHIPTO.

Page Name	Definition Name	Usage
ShipTo Attachments Page	PV_REQ_SHIP_ATTCH	Displays the attachments added to this requisition at the ship to level.
VAT Information for Schedule Page	REQ_INQ_SCHED_VAT	Review value added tax (VAT) information for the schedule line. The page does not display when the Calculate VAT on Req check box at Purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment, or the VAT _DETAILS eProcurement role action is not used. Using this page, you can override the recovery percentage and rebate percentage, and recalculate or reset VAT defaults changes that are made to VAT determinants.
<u>VAT Details For Distribution Page</u>	REQ_INQ_DIST_VAT	Review value added tax (VAT) information for the distribution line. The page does not display when the Calculate VAT on Req check box at Purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment, or the VAT _DETAILS eProcurement role action is not used. Using this page, you can override the recovery percentage and rebate percentage, and recalculate or reset VAT defaults changes that are made to VAT determinants.
<u>Edit Requisition-Review and Submit Page</u>	PV_REQ_CHECKOUT	Edit requisition information. This page is accessible only for open requisitions.
<u>Requisition Details for <Requester> Page</u>	PV_REQ_CANCEL	Cancel requisition.
Approval Status Page	PV_REQ_APPROVAL	View summary information for the requisition including the number of items and the total price. This page is similar in appearance to the Requisition Approval page.

Related Links

[Setting Up Installation Options](#)

Managing Requisitions Page

Use the Manage Requisitions page (PV_REQ_STATUS) to view and manage requisitions.

Navigation:

eProcurement > Manage Requisitions

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

Manage Requisitions

Requisition Search | Keyword Search

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit Requisition Name
 Requisition ID Request State Budget Status
 Date From Date To
 Requester Entered By PO ID
 To locate requisitions containing specific lines, edit the criteria below and click the Search button.

Item ID Item Description
 Ship To Supplier Item ID

[Hide Advanced Search](#)

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
▶ 0000000181	0000000181	US001	02/26/2013	Open	Not Chk'd	645.00 USD	<Select Action>	Go
▶ 0000000180	0000000180	US001	02/26/2013	Open	Not Chk'd	645.00 USD	<Select Action>	Go
▶ 0000000179	0000000179	US001	02/26/2013	Open	Not Chk'd	645.00 USD	<Select Action>	Go
▶ 0000000178	0000000178	US001	02/26/2013	Open	Not Chk'd	645.00 USD	<Select Action>	Go
▶ 0000000177	0000000177	US001	02/26/2013	Open	Not Chk'd	1,225.00 USD	<Select Action>	Go
▶ 0000000176	0000000176	US001	02/26/2013	Open	Not Chk'd	645.00 USD	<Select Action>	Go

Use this page to review requisitions. From this page, you can access other pages to perform tasks, such as review requisition details, edit or cancel requisitions, create change requests, receive stock, copy requisition, view approvals, or return stock to the supplier.

Before using this page, determine your display options:

- Use the eProcurement Installation Options page to define the maximum number of rows that are retrieved and appear on the Manage Requisitions page.
- If the eProcurement role action *NO_DEFAULT_RESULT* is assigned to a user, requisitions do not appear in the scroll area until the user clicks **Search**.

Search Requisitions

Enter search criteria in this group box and click the Search button to display requisitions below in the Requisitions group box. Search criteria include:

<i>Field or Control</i>	<i>Description</i>
Business Unit	Select the PeopleSoft Purchasing business unit.
Requisition Name	To find a specific requisition, enter the description of the request entered by the requester when the requisition was added.

Field or Control	Description
Requisition ID	Enter a specific requisition ID to display.
Request State	Select the state for the overall requisition (header-level) to limit the requisitions displayed to this status. Leave this field blank to display search results without using request state as a search criteria. The following search criteria are included: • <i>All but Complete</i> — Displays all requisitions except those with the status <i>Complete</i>. • <i>Approved</i> • <i>Cancelled</i> • <i>Complete</i> • <i>Denied</i> • <i>Open</i> • <i>PO Partially Canceled</i> • <i>PO Partially Created</i> • <i>PO(s) Created</i> • <i>PO(s) Dispatched</i> • <i>Partially Dispatched</i> • <i>Partially Received</i> • <i>Pending</i> • <i>Received</i> • <i>See Lines</i> • <i>Service Complete</i> • <i>Service Filled</i> • <i>Service Sourced</i> Note: States are defined below for the Request State field (at the requisition header level) in the Requisitions group box.

Field or Control	Description
Budget Status	Displays the header results of a budget check initiated by clicking the Check Budget button or the Pre-Check Budget button. The options are: • <i>Valid</i>: The requisition passed budget checking and the Budget Processor has updated the control budget ledger (LEDGER_KK). • <i>Not Checked</i>: The Budget Processor has not processed the requisition. • <i>Error</i>: The requisition failed budget checking. • <i>Provisionally Valid</i>: The requisition passed budget checking but no pre-encumbrance was created in the control budget ledger. This status is used when you select the Pre-Check Budget button.
Date From and Date To	Enter the creation date or range of dates for the requisitions.
Requester	Enter the requester of the requisition.
Entered By	Enter the user ID of the individual who entered in the requisition. This is usually the requester but can be another individual.
PO ID	Enter the Purchase Order ID where the requisition was sourced.
Show Advanced Search	Click to view four more search fields, which are: • Item ID • Item Description • Ship To • Supplier Item ID

Keyword Search

Enter a word (for example UPN ID) or a string of characters in the Keyword Search box, and then click the Search button to display requisitions having UPN ID in the Requisitions group box.

Requisitions

This group box displays requisitions based on the search criteria in the Search Requisitions group box. Basic information about the entire requisition (requisition header-level) is displayed for each requisition. You can view additional information, including line details by using the Expand Section icon.

Field or Control	Description
Req ID (requisition id)	Click a requisition ID to access the Requisition Details page, where you can view additional details of the requisition.
Requisition Name	Displays the description of the request entered by the requester when the requisition was added. The requisition name helps to identify this requisition as it flows through the system. If no requisition name was entered, then the requisition ID is displayed.
BU	Displays the PeopleSoft Purchasing Business Unit for this requisition.
Date	Displays the date the requisition was created.

Field or Control	Description
Request State (at the requisition header level)	This state field displays the request state across the entire procurement cycle, not just the requisition header state. The following states are included: • <i>Approved:</i> The requisition have been approved and is ready for sourcing. For this status to display at the header level, all lines of this requisition must be in the Approved status. • <i>Cancelled:</i> The requisition was entered and saved but then the entire requisition or each requisition line was canceled. For this status to display at the header level, all lines of this requisition must be in the Canceled status. A canceled requisition can be reopened within a certain number of days as specified for the Purchasing business unit; otherwise, it is closed permanently. • <i>Complete:</i> The requisition is marked complete after the requisition is dispatched on a PO, the goods are received and the supplier is paid. A background process identifies the requisitions and moves them to the complete status. Canceled requisitions and those that are fulfilled by inventory stock are also identified as complete. • <i>Denied:</i> The entire requisition or each requisition line has been denied in the approval process. For this status to display at the header level, all lines of this requisition must be in the Denied status. • <i>Open:</i> The requisition has been entered and saved but not yet submitted. For this status to display at the header level, all lines of this requisition must be in the Open status. • <i>PO Partially Canceled:</i> The requisition contains some lines that have been placed on purchase orders and these purchase orders have been subsequently been canceled. For this status to display, the purchase orders must all have the same status, Canceled. This status indicates that some of the requisition lines have not been sourced to a purchase order and it also indicates that none of the lines have been received or returned to supplier. • <i>PO Partially Completed:</i> The purchase order has been closed for some of the requisition lines , however the requisitions are not yet closed. • <i>PO Partially Created:</i> The requisition contains some lines that have been sourced to an approved purchase order. For this status to display, the purchase orders must all have the same status, Approved. This status indicates that some of

Field or Control	Description
	the requisition lines have not been sourced to a purchase order and it also indicates that none of the lines have been received or returned to supplier. • <i>PO(s) Created:</i> The requisition has been placed on a PO that has been approved. This header status indicates that all lines of this requisition have been sourced to approved purchase orders and the requisition line status is PO(s) Created. For this status to display, the purchase orders must all have the same status, Approved. • <i>PO(s) Cancelled:</i> The requisition has been placed on a PO that has been subsequently been canceled. This header status indicates that all lines of this requisition have been sourced to canceled purchase orders and the requisition line status is PO(s) Canceled. For this status to display, the purchase orders must all have the same status, Canceled. • <i>PO(s) Completed:</i> The purchase order has been closed for all of the requisition lines , however the requisitions are not yet closed. • <i>PO(s) Dispatched:</i> The requisition has been placed on a purchase order and the purchase order has been dispatched to the supplier. This header status indicates that all lines of this requisition have been sourced to dispatched purchase orders and the requisition line status is PO(s) Dispatched. For this status to display, the purchase orders must all have the same status, Dispatched. • <i>Partially Dispatched:</i> The requisition contains some lines that have been placed on purchase orders and these purchase orders have been dispatched to the supplier. For this status to display, the purchase orders must all have the same status, Dispatched. This status indicates that some of the requisition lines have not been sourced to a purchase order and it also indicates that none of the lines have been received or returned to supplier. • <i>Partially Received:</i> The requisition contains some lines that have been placed on a purchase order, the purchase order has been dispatched to the supplier, and the goods have been fully or partially received. This status indicates that some of the requisition lines have not been received. • <i>Pending:</i> The requisition has been submitted and is awaiting approval. This header status indicates that all lines of this requisition have the line status of Pending.

Field or Control	Description
	• <i>Received:</i> The requisition has been placed on a purchase order, the purchase order has been dispatched to the supplier, and the goods have been fully received. For this status to display at the header level, all lines of this requisition must be in the Received status. • <i>See Lines:</i> The lines of this requisition are in various stages of the approval process and the lines have different statuses (i.e. pending, approved, denied, and so on); however, none of the lines have been sourced to a purchase order.
Budget	View the budget status for the requisition. This column appears when Commitment Control is enabled.

Field or Control	Description
<Select Action>	Select an option and click the Go button to perform the action. The available actions vary depending on the status of the requisition. Actions include: • <i>Approvals</i> displays the Approval Status page. • <i>Cancel</i> displays the Requisition Details for: <name> page (PV_REQ_CANCEL), which has a Cancel Requisition button. When the Cancel Requisition button is clicked, a confirmation page is displayed, where the user can enter a reason code and a comment. • <i>Copy</i> displays the Review and Submit page. All items are copied to the new requisition. However, if one item was created from a special request, a message appears. • <i>Edit</i> displays a warning message indicating that editing the requisition will restart the approval process. Click OK to continue or click Cancel to go back. If you click OK, the Edit Requisition - Review and Submit page appears for the requisition. Changing a requisition can create a change request. • <i>View Print</i> displays the print version of the requisition. Some additional Actions available are Receive, Process Returns, Check Budget, and Pre-Check Budget . Note: The options that appear for a requisition differ depending on the status of the requisition. For example, you cannot cancel a requisition for which a PO is created.
Go	Click to perform the selected action.
Create New Requisition	Click to access the Create Requisition page, where you can add another requisition.
Review Change Request	Click to access the Change Request List for page, where you can view and process change requests.

Field or Control	Description
Review Change Tracking	Click to display the View Requisition Change Tracking History page, where you can view changes to requisitions if you are using the change tracking feature. This page provides an audit trail of key transactional information including, changes to any fields marked for track changes on the change template, the user who modified the requisition, and the date and time of each requisition change request.
Manage Receipts	Click to access the Receipts For page, where you can view and maintain receipts.
Requisition Report	Click to access the Print Requisition process page, where you can define parameters for creating the printed requisition report (POY1100).

Requisition Cycle

Use the Requisition Cycle page (PV_REQ_CYCLE_PAGE) to displays the business process flow for a requisition with links to various documents.

The business process flow, or lifecycle, includes icons for requisition creation, requisition approval, sourcing to inventory stock, sourcing to a purchase order, purchase order acknowledgments (POA), advanced shipping notices (ASN), change requests, receiving, returns, invoices, and payment. The icons are highlighted when the requisition has completed the step. Some of the icons link you to additional information on a separate page. In order to view the POA and ASN icons you must select the Requisition Cycle Options on the eProcurement Business Unit Options page.

Navigation:

On the Manage Requisitions page, click the **Expand Section** icon next to a listed requisition.

Access the Requisition Cycle section of the Manage Requisitions page (Click the **Expand Section** icon next to a listed requisition).

The Requisition Cycle section displays the business process flow for a requisition with links to various documents. The business process flow or lifecycle, includes icons for requisition creation, requisition approval, sourcing to inventory stock, sourcing to a purchase order, purchase order acknowledgments (POA), advanced shipping notices (ASN), change requests, receiving, returns, invoices, and payment.

Stages in the requisition cycle that are complete or in progress are highlighted with active links.

This same information can be viewed on a separate page, the Requisition Cycle for: <requester> page (PV_REQ_CYCLE_PAGE), if the user is linked to the eProcurement role action of VIEW_REQ_CYCLE. To access this page select **View Cycle** in the Select Action field and click the **Go** button.

Field or Control	Description
Requisition	Click the Requisition icon to access the Requisition Details page (PV_REQ_PO_DTLS), where you can view detailed information about this requisition.
Approvals	Click the Approvals icon to access the Approval Status page (EOAWMA_TXNHDTL_FL), where you can view the current approval status of the requisition and view line approval details.
Inventory	Click the Inventory icon to access the Stock Requests page (ORDER_INQ_INV), where you can view the material stock request created from this requisition to fulfill the demand using inventory stock.
Purchase Orders	Click the Purchase Orders icon to access the Purchase Order Inquiry page (PV_PO_LINE_INQ_2), where you can view information about the purchase order that this requisition was sourced to; including, the purchase order number, buyer, and supplier.
POA	Click the POA icon to access the PO Acknowledgement page (PV_POA_INQUIRY), where you can view the purchase order acknowledgement tied to this requisition. You can select the Details link of a POA to view the acknowledgement history.
ASN	Click the ASN icon to access the ASN History page (PV_ASN_INQUIRY), where you can view the advanced shipping notice tied to this requisition. Click the Details icon to navigate to the ASN History page, where you can review the arrival date, bill of lading number, carrier, and other information about the incoming shipment. If there is only one ASN for the selected requisition, the ASN History page is displayed directly.
Change Request	Click the Change Request icon to access the Review Change Requests page (PV_CHNG_REQST_LIST), where you can view requisition change request details after it has been sourced to a Purchase Order, view change reason, and processing error if any.
Receiving	Click the Receiving icon to access the Manage Receipts page (PV_RECV_UPDATE_REQ), where you can view the purchase order receipt linked to your requisition.

Field or Control	Description
Returns	Click the Returns icon to access the Manage Return To Vendor (Supplier)s page (PV_RTV_UPDATE_REQ), where you can view the RTV linked to your requisition.
Invoice	Click the Invoice icon to access the PO Inquiry page (PV_PO_INQUIRY), where you can view the requisition, purchase order, receipts, vouchers, and Invoice Number.
Payment	Click the Payment icon to access the Payment Inquiry page (PV_PYMNT_INQUIRY), where you can view the payment details for the PO.

Line Information

The Line Information group box displays information about each line within the requisition.

Navigation:

To access the Line Information group box on the Manage Requisitions page, click the **Expand Section** icon next to a listed requisition.

This example illustrates the fields and controls on the Line Information group box. You can find definitions for the fields and controls later on this page.

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Total
0000000020	0000000020	US003	12/09/2020	Partially Received	8,840.00 USD

Requester Rosanna Channing Entered By Rosanna Channing Priority Medium

Requisition
 Approvals
 Inventory
 Purchase Orders
 POA
 ASN
 Change Request
 Receiving
 Returns
 Invoice
 Payment

Request Lifespan:

Line Information
Personalize | Find | 1 of 4 | First 1-4 of 4 Last

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	CPU - 200MHz	Received	630.00	USD		3 EA	Star Rental Group
2	CPU - 300MHz	PO Dispatched	900.00	USD		2 EA	Eastern Bay Office Supplies
3	Monitor 17 inch Color	Approved	1500.00	USD		2 EA	Big CompUSA
4	Financial Software	Approved	Multiple	USD		5 EA	Midton Computer Supplies

Field or Control	Description
Description	Click the link to access the Item Description page where you can view information about the item.

Field or Control	Description
Status (at the requisition line level)	This status field displays the status of the requisition line. The statuses include: • <i>Approved:</i> The requisition line has completed workflow approval and is approved. The line is ready for sourcing. • <i>Cancelled:</i> The requisition line was entered and saved but then canceled. A canceled requisition line can be reopened within a certain number of days as specified for the Purchasing business unit; otherwise, it is closed permanently. • <i>Complete:</i> The requisition line is marked complete after the line is dispatched on a PO, the goods are received and the supplier is paid. A background process identifies the requisition lines and moves them to the complete status. Canceled requisition lines and those that are fulfilled by inventory stock are also identified as complete. • <i>Denied:</i> The requisition line has been denied in the approval process. • <i>Open:</i> The requisition line has been entered and saved but not yet submitted. • <i>PO(s) Created:</i> The requisition line has been placed on a PO that has been approved. • <i>PO(s) Canceled:</i> The requisition line has been placed on a PO that has been subsequently been canceled. • <i>PO(s) Dispatched:</i> The requisition line has been placed on a purchase order and the purchase order has been dispatched to the supplier. • <i>Multiple PO(s):</i> The requisition line has been sourced to more than one purchase order and all are in different status. • <i>Pending:</i> The requisition line has been submitted and is awaiting approval. • <i>Received:</i> The requisition line has been placed on a purchase order, the purchase order has been dispatched to the supplier, and the goods have been fully received.

Field or Control	Description
 (Cancel Requisition icon)	Click this icon to cancel a line on the requisition. You can cancel a requisition that has been sourced to a purchase order. If the cancellation completes budget checking and workflow approval, then the system creates a change request for cancelling the corresponding purchase order lines. A requisition line cannot be cancelled if you are using Commitment Control and the line has not yet pass budget checking. Also when a requisition line is sourced to multiple purchase orders it cannot be cancelled. If the approval process includes one or more stages that have only header level approval and a requisition line is cancelled, the entire requisition is resubmitted for approval for the entire approval process. For example, all stages are resubmitted. If the approval process includes one or more stages that have only line-level approval and a requisition line is cancelled, the line approval thread is terminated. If the approval process includes two or more stages that have a combination of line-level and header-level approval and a requisition line is cancelled, the line-level approval thread is terminated if the current stage that the approval is on is a line-level approval. If the current stage is a header-level , then the requisition is resubmitted for the entire process.

PeopleSoft Approval Framework

Related Links

[Creating Requisitions](#)

“Canceling Requisitions and Requisition Lines” (PeopleSoft Purchasing)

Requisition Details Page

Use Requisition Details page (PV_REQ_PO_DTLS) to view details about individual requisitions. The PO Information header appears only if a PO was created for the requisition.

Navigation:

To access the Requisitions Details page (Click the **Req ID** link on the Manage Requisitions page).

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

Requisition Details

Requisition Summary

Business Unit	US001	Requisition Name	0000000149
Date	11/13/2013	Requisition ID	0000000149
Request State	Approved	Total Amount	700.00 USD
Requested For	VP1		

[Header Custom Fields](#)

Expand lines to review shipping and accounting details

Requisition Lines

Line	Item Description	Source Status	Amount Only	Qty	Price	Status	Total
1	3 Season Mummy Bag, Regular...	Available	No	5.0000 Each	120.00000USD	Approved	600.00

[Line Custom Fields](#) [Contract Information](#)

Shipping Line 1 Ship To US001
144 North Street
New York, NY 10168
Quantity 5.0000
Item Price 120.00000
[Price Adjustment](#)
[Schedule Custom Fields](#)

Attention To Kenneth Schumacher
Due Date

Accounting Lines

Distribute By Qty				Liquidate By Amt			
Accounting Lines Personalize First 1 of 1 Last							
Details More Details More Details 2 Asset Information Budget Information							
Dist #	Status	Location	Req Qty	Merchandise Amt	Percent	GL Unit	Entry Event
1	Open	US001	5.0000	600.00	100.0000	US005	212020

Account	Alt Acct	Oper Unit
212020		

| 2 | Air Mattress, Double | Available | No | 10.0000 Each | 10.00000 USD | Approved | 100.00 |

[Line Custom Fields](#) [Contract Information](#)

[Return to Manage Requisitions](#)

This example illustrates the fields and controls on the Custom Fields for Line 1 page.

Custom Fields for Line 1

Custom Character 1 L

Custom Character 2 L

Custom Date 08/19/2013

Custom Field 1 Line 1Custom 1

Custom Field 2 Line 1Custom 2

Custom Field 3 Line 1Custom 3

Custom Field 4 Line 1Custom 4

[Return](#)

Field or Control	Description
Header Custom Fields	Click to view the Custom Fields for Header page that opens in a pop-up window. The custom field values appearing on this page are display only.
 (Go To Attachments)	Click this icon to access the Line Attachments page where you can view the attachments to this requisition.
Line Comments	Displays any comments added at the requisition line-level. See Line Comment Page .
Item Description	Click the hyperlink to view the item's detailed description.
Source Status	View the stage of the requisition line in the sourcing process. Values include: • <i>Not Sourced</i> • <i>Available</i>: The requisition line has not yet been placed on a PO or inventory stock request. • <i>In Process</i>: A sourcing process is running on this requisition line or an error occurred in creating a PO. • <i>Staged</i>: The requisition has been staged to the sourcing tables. This status is a link to the Sourcing Workbench in PeopleSoft Purchasing where you can view the details of the sourcing status. • <i>Complete</i>: The requisition line has been sourced to an inventory stock request or a PO. This status is a link to the Sourcing Workbench in PeopleSoft Purchasing where you can view the details of the sourcing status. • <i>Error</i>: The requisition line is in error on the Sourcing Workbench. This status is a link to the Sourcing Workbench in PeopleSoft Purchasing where you can view the details of the sourcing status. See “Using the Sourcing Workbench” (PeopleSoft Purchasing).
Amount Only	A <i>Yes</i> indicates that this line is for an amount value only. The quantity will be 1, and only one schedule line will be available.

Field or Control	Description
Original Substituted Item	Displays the original Item ID on the transaction line that was replaced when a Substitute Item was found. Once the field is populated, the original Item ID will not be overridden with another Item ID. If the Item ID field is changed directly by the Requester or Buyer, the Original Substituted Item field is cleared. Similarly, if the Supplier ID/ Location field is changed by the Requester or Buyer, then the value in the Original Substituted Item field is cleared and the value is moved back to the Item ID field.
	This icon helps the Requester or Buyer to know whether the item has been substituted. This appears on a transaction line whenever the Original Substituted Item field is populated. If Original Substituted Item and Description fields are already displayed in the component, i.e. Requisition and PO, a text 'Substitute Item in Use' will appear.
Description	Displays the item description for the Original Substituted Item, if the field is populated.
Sourced from Inventory	Click the Sourced from Inventory button to access the Requisition to MSR List page, where you can view stock request information. This button only appears if the requisition line item is defined as an inventory item in PeopleSoft Inventory on the Item Definition - General : Common page.
Requisition Schedule and Distribution	Click this link to access the Requisition Detailed Summary page, where you can view line details, schedules, and distribution information. Note: If the Amount Only check box is selected in the requisition line and requisition line is associated to Amount Only Work Order schedule, then the Schedule Date, Amount, currency fields are displayed. The Schedule Date, Amount, Currency fields are from WO schedule not from the Requisition.
Line Custom Fields	Click to view the Custom Fields for Line 1 page that opens in a pop-up window. The custom field values appearing on this page are display only.
Schedule Custom Fields	Click to view the Custom Fields for Line 1 and Schedule 1 page that opens in a pop-up window. The custom field values appearing on this page are display only.

Field or Control	Description
Price Adjustment	Click the link to view price adjustments for the schedule. This link is controlled by users with specific role name and eProcurement role action VIEW_PRICEADJUSTMENTS.
Ship To	The location code that indicates the location where the supplier should deliver the items.
 (One Time Address)	Select this icon to view the Req Schedule One Time Address page (PV_REQ_INQ_ADDR), where you can view a one-time ship to address added to this requisition line when it was added or edited. The One Time Address icon is not visible if the user is linked to the eProcurement role action of NO_ONETIME_SHIPTO.
Due Date	The date the requester would like the items to arrive at the Ship To location.
Ship Via	Displays the Ship Via Code value. Note: This field is visible only if SHIPVIA_FREIGHT_DISPLAY role action is enabled.
Freight Terms	Displays the Freight Terms Code value. Note: This field is visible only if SHIPVIA_FREIGHT_DISPLAY role action is enabled.
 (Go To Attachments)	Select this icon to access the ShipTo Attachments page, where you can view the attachments to this requisition at the Ship To level. See Header Comments Page .
 (Schedule VAT icon)	Click the Schedule VAT icon to access the VAT Information for Schedule page, where you can review value added tax (VAT) information for the schedule line. The icon does not appear when the Calculate VAT on Req check box at Purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment , or the VAT_DETAILS eProcurement role action is not used and the user eProcurement role is not added to the user ID profile. Using this page, you can override the recovery percentage and rebate percentage, and recalculate or reset VAT defaults changes that are made to VAT determinants. See “Understanding VAT” (PeopleSoft Global Options and Reports).

Field or Control	Description
Ship To Comments	Displays comments added to this requisition at the ship to level. See Header Comments Page .

Contract Information

This link appears if a contract ID has been assigned to the requisition line. Click this link to view contract details that opens in a secondary page.

The PeopleSoft eProcurement, PeopleSoft Purchasing, and PeopleSoft Payables applications are integrated with the procurement contract functionality to streamline the use of contracts with requisitions, purchase orders, and vouchers. As part of the contract functionality, you can set up requisitions to automatically search for a contract to use for requisitions. Applying default contract prices to requisitions enables you to receive contract prices for requisition items and to more accurately track budgets and pre-encumbrance balances.

See “Applying Contracts to Requisitions” (PeopleSoft Purchasing).

Field or Control	Description
Contract ID	Displays the purchasing contract used to price this requisition line. The contract ID can be entered manually on the Review and Submit-Line Details page when creating and editing a requisition. A contract ID can also be added automatically by the system when you have selected the Default Contract On Req check box on the Purchasing Definition - Business Unit Options page.
Version	Displays the contract version applied to this requisition line. Multiple versions are available when you are using version control. Contract versions enable contract administrators to create and maintain multiple versions of a contract in the procurement system.
Contract Line	Displays the contract line applied to this requisition line.
Category Line	Displays the contract category line number. Categories enable you to specify groups of items on a contract, rather than having to enter the items one at a time.

See “Understanding Voucher and Order Contracts” (PeopleSoft Source to Settle Common Information).

PO Information

This link appears if the requisition item is sourced to PO. Click this link to view the PO information that opens in a secondary page.

<i>Field or Control</i>	<i>Description</i>
Receipt Status	Displays the receipt status for this PO. Values include: <i>PO Not Received:</i> No quantities for this PO line have been received. <i>PO Partially Received:</i> Part or all quantities for this PO line have been received. Even if the quantity is fully received, the status does not change until you run the Match Request process in PeopleSoft Payables. <i>PO Received:</i> All quantities for this PO line have been received. Run the Matching process (AP MATCHING) in PeopleSoft Payables.
View Receipt	Click the View Receipt button to access the Receipt For a Casual User page. This button appears if a receipt was recorded for this line.

Accounting Lines — Details

<i>Field or Control</i>	<i>Description</i>
Dist # (distribution number)	Displays the number the system assigns to this distribution. The system uses this numbering to distinguish between multiple distributions for a single requisition line.
Status	Distribution statuses include: <i>Open:</i> The distribution line is open. <i>Complete:</i> The distribution line is closed. <i>Processed:</i> The distribution line has been processed and is unavailable for sourcing. <i>Canceled:</i> The distribution has been canceled.
Distribution Type	Displays the distribution type that was selected for the requisition line. Values are <i>Labor</i> and <i>Expense</i> .

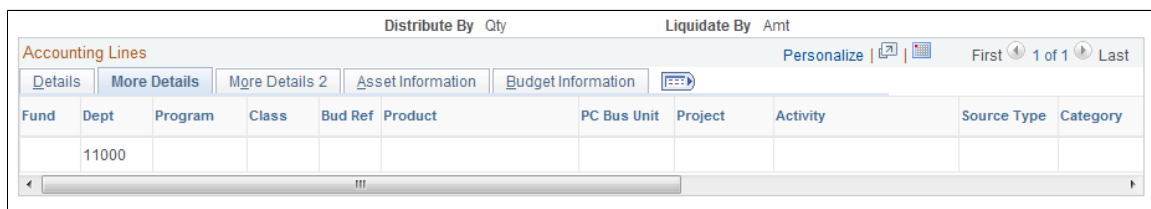
Field or Control	Description
 (Distribution VAT icon)	Click the Distribution VAT icon to access the VAT Information for Distribution page, where you can review value added tax (VAT) information for the distribution line. The icon does not appear when the Calculate VAT on Req check box at Purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment, or the VAT_DETAILS eProcurement role action is not used. Using this page, you can override the recovery percentage and rebate percentage, and recalculate or reset VAT defaults changes that are made to VAT determinants. See “Understanding VAT” (PeopleSoft Global Options and Reports).

Accounting Lines — More Details

Access the Accounting Lines — More Details tab.

Select the More Details tab.

This example illustrates the fields and controls on the Accounting Lines — More Details page.

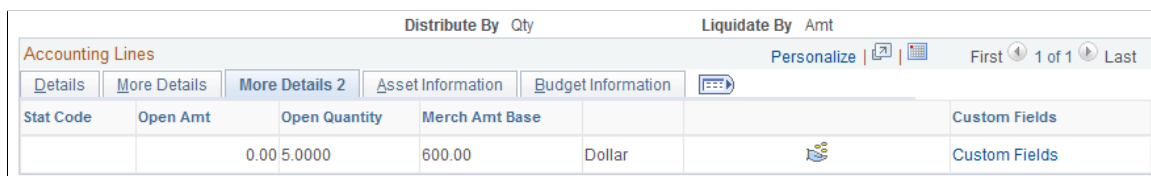


Along with viewing accounting information, you can access projects. Click the **Projects** link to view and update projects and activities.

Accounting Lines — More Details 2

Access the Accounting Lines — More Details 2 tab.

This example illustrates the fields and controls on the Accounting Lines — More Details 2 page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Stat Code (statistics code)	Displays the code used to maintain statistical amounts to facilitate financial analysis and reporting. You can track a variety of non-monetary amounts with statistics.
Open Amt (open amount)	Displays the amount that is still open on the requisition that is not sourced to the purchase order(s) when the requisition is distributed by amount.
Open Quantity	Displays the quantity that is still open on the requisition that is not sourced to the purchase order(s) when the requisition is distributed by quantity.
Base Amt (base amount)	Displays the monetary value for this distribution line. The value appears in the base currency for the business unit. The currency type also appears with the value. If the currency is different than the base currency, an exchange rate also appears.
	Click to view the exchange currency information and the exchange rate.
Custom Fields	Click to view the Custom Fields for Line 1 and Schedule 1 and Distribution 1 page that opens in a pop-up window. The custom field values appearing on this page are display only.

Accounting Lines — Asset Information

Access the Accounting Lines - Asset Information tab.

This example illustrates the fields and controls on the Accounting Lines - Asset Information page. You can find definitions for the fields and controls later on this page.

Distribute By Qty				Liquidate By Amt			
Accounting Lines							
Personalize  				First 1 of 1 Last			
Details		More Details		More Details 2		Asset Information	
Budget Information							
Asset Mgmt Bus. Unit	Profile ID	CAP #	Sequence	Tag Number	EmplID	Capitalize	Cost Type
						☐	

Field or Control	Description
Asset Mgmt Bus. Unit	Displays the Asset Management Business Unit.

Field or Control	Description
Profile ID	Displays the default asset profile ID associated with distribution items.
CAP # (capital acquisition plan ID)	The CAP identification ties the asset to a capital acquisition plan.
Sequence	Displays the sequence number for the capital acquisition plan.
Tag Number	If you use tags to track assets, enter the tag number assigned to the asset.
EmplID (employee ID)	Employee ID of the custodian for this distribution item.
Capitalize	Select to designate this item as a capitalized item. If the item is capitalized, it can be depreciated before the order is paid.
Cost Type	Displays the default cost type associated with the item purchase, if applicable. Cost types represent components of the cost of an asset, such as materials, labor, and overhead.

Accounting Lines - Budget Information

Access the Accounting Lines - Budget Information tab.

This tab is hidden if Commitment Control for Purchasing is not enabled.

This example illustrates the fields and controls on the Accounting Lines - Budget Information page. You can find definitions for the fields and controls later on this page.

Distribute By Qty				Liquidate By Amt		
Accounting Lines				Personalize  		
First  1 of 1  Last						
Details	More Details	More Details 2	Asset Information	Budget Information		
Budget Status	Budget Date	Pre-Encumbrance Balance	Currency	Pre-Encumbered Base Balance	Base Currency	Commitment Control Close Flag
Not Chk'd	11/13/2013	0.000		0.000		☐

Field or Control	Description
Budget Status	When Commitment Control for purchasing is enabled, displays the distribution line results after budget checking is initiated. Values for the field include: • <i>Not Chk'd</i>: The requisition has not been budget checked or budget processor has not processed requisition monetary amount changes. • <i>Valid</i>: The requisition passed budget checking and the budget processor has updated the control budget ledger. • <i>Error</i>: The requisition failed budget checking. • <i>Warning</i>: The requisition passed budget checking but with warning messages. It could be that the requisition amount exceeded budget amount but it is still within the budget tolerance. For more examples of Warning and Error, see “Understanding Commitment Control and General Ledger Journals” (PeopleSoft General Ledger). • <i>Bypass</i>: The requisition distribution is not subject to budget checking for any of the commitment control ledger groups that are assigned to the General Ledger business unit. Budget processor will set the budget line status to <i>Bypass</i> for a transaction line that is not subject to budget checking.
Budget Date	Displays the date used by commitment control to determine the budget period to which this control budget belongs.
Pre-Encumbrance Balance	Displays the pre-encumbrance balance for this requisition distribution after it is successfully budget checked. Click the Pre-Encumbrance Balance amount hyperlink to view requisition accounting entries for this distribution only. You can use this page to view accounting information details including the commitment control ledger group and transactions that have been performed against this requisition distribution. When this requisition line and distribution is sourced to a purchase order and budget checked, commitment control liquidates the pre-encumbrance balance from this requisition distribution and establishes an encumbrance for the purchase order.
Currency	Displays the currency code for the pre-encumbrance amount at the distribution level of the requisition. The currency code is based on the commitment control ledger group for the distribution level General Ledger business unit.

Field or Control	Description
Pre-Encumbrance Base Balance	Displays the pre-encumbrance balance in requisition base currency.
Base Currency	Displays the base currency of the pre-encumbrance balance on the business unit.
Commitment Control Close Flag	Displays as selected when the Purchase Order associated with the requisition is finalized for less, thus indicating that the outstanding pre-encumbrance has been fully liquidated. This flag also displays as selected when the requisition distribution has been canceled. When the requisition is closed and remaining pre-encumbrance amount liquidated on the budget, this flag displays as selected on the requisition distribution.

Related Links

“Defining Purchasing Item Attributes” (PeopleSoft Purchasing)

VAT Details For Distribution Page

Use the VAT Details for Distribution page (REQ_INQ_DIST_VAT) to review value added tax (VAT) information for the distribution line.

The page does not appear when the **Calculate VAT on Req** check box at the Purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment, or the VAT_DETAILS eProcurement role action is not used. Using this page, you can override the recovery percentage and rebate percentage, and can recalculate or reset VAT default changes that are made to VAT determinants.

Navigation:

Click the **Distribution VAT** icon on the Requisition Details page.

Use this page to view VAT details at the distribution line level. Information that appears on the page relates to the requisition line number item and the schedule that you selected on the Manage Requisitions page. The page does not appear when the **Calculate VAT on Req** check box at the Purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment, or the VAT_DETAILS eProcurement role action is not used. Using this page, you can override the recovery percentage and rebate percentage, and can recalculate or reset VAT defaults changes that are made to VAT determinants.

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

Requisition Distribution VAT

Line 1

Sched Num 1

Distrib 1

[Return To Distribution Page](#)

Expand All Sections

Collapse All Sections

VAT Defaults

VAT Registrations

VAT Controls

Use Type COMM

Apportionment Control Distribution GL Business Unit

Recovery Source Automatically calculated

Rebate Source Automatically calculated

VAT Treatments

Treatment Domestic Goods Purchase

VAT Details

Tax Rate 19.6000

Transaction Type FAMD

VAT Calculations

Transaction Amount	1180722.60	FRF	Transaction Amount Base	1180722.60	FRF
Basis Amount	1180722.60	FRF	Basis Amount Base	1180722.60	FRF
Tax Rate	19.6000				
Recorded Amount	231421.63	FRF	Recorded Amount Base	231421.63	FRF
Recovery Percent	100.00				
Rebate Percent	0.00				
Recovery Amount	231421.63	FRF	Recovery Amount Base	231421.63	FRF
Rebate Amount	0.00	FRF	Rebate Amount Base	0.00	FRF

Recalculate

VAT Defaults

Field or Control	Description
Use Type	Determines VAT recoverability. The field value is retrieved from the VAT default hierarchy, but you can override this value. Use type is a type of activity in which a purchased good or service will be used and, therefore, to determine a recoverability percent and a rebate percent (when applicable) that is applied to a transaction line. Activities are categorized as taxable, exempt, or mixed. Where activity is mixed, you can associate either the ratio of taxable activity to exempt activity directly with the use type, or you can indicate that this ratio is determined at the ChartField level.

Field or Control	Description
Apportionment Control	Displays the business unit that you want to control the VAT apportionment. This value appears by default from the Purchasing business unit. VAT apportionment is the mechanism that enables you to specify the ratio of taxable activity to exempt activity for individual ChartFields.
Recovery Source	Select whether the VAT recovery is <i>Automatic</i> or <i>Manual</i> . This value appears by default from the Purchasing business unit. If you select <i>Manual</i> , enter a value in the Recovery Percent field.
Rebate Source	Select whether the VAT rebate is <i>Automatic</i> or <i>Manual</i> . This value appears by default from the Purchasing business unit. If you select <i>Manual</i> , enter a value in the Rebate Percent field.
Treatment	Controls default and transaction behavior. A description of how the transaction must be treated for VAT purposes. This value is used to determine how VAT defaults are applied, what accounting entries are required, and how and if the transaction is reported on the VAT return. You can override the values in this field. The VAT defaulting hierarchy determines the value of this field based on the country in which the service is deemed to have been performed, and the countries in which the bank and beneficiary are located and registered.
VAT Code	Select a value to specify the rate at which VAT is calculated. The VAT code used to define a percentage the system uses to determine the VAT amount. The VAT code is similar to the sales and use tax code, with a few exceptions. The tax authority tied to the VAT code generally consists of a single authority, and the ChartFields for a VAT code do not reside with the tax authority but are determined by the combination of the VAT code, VAT account type, and VAT transaction type.
Transaction Type	Select a value to categorize VAT transactions according to particular VAT accounting and reporting requirements. The VAT code and the VAT transaction type are used in conjunction with the VAT account type to obtain the ChartFields for accounting entries.

VAT Calculations

<i>Field or Control</i>	<i>Description</i>
Transaction Amount	VAT amount in the transaction currency.
Transaction Amount Base	VAT amount in the base currency.
Basis Amount	VAT basis amount in transaction currency.
Basis Amount Base	VAT basis amount in the base currency.
Tax Rate	Displays the rate at which this item is taxed.
Recorded Amount	Displays the amount of VAT calculated for the schedule in the transaction currency.
Recorded Amount Base	Displays the amount of VAT calculated for the schedule in the base currency.
Recovery Percent	Displays a system-calculated value based on the selected VAT use type. You can override the automatic value if the VAT Allow Override Recovery/Rebate field on the business unit indicates that manual override is allowed. This value must be less than or equal to 100 and a positive number. To access the field, select eProcurement > Procurement Application Admin > Maintain Business Units > Processing Options and click the Set VAT Default link.
Rebate Percent	Displays a system-calculated value based on the selected VAT use type. You can override the automatic value if the VAT Allow Override Recovery/Rebate field on the business unit indicates that manual override is allowed. This value must be less than or equal to 100 and a positive number. To access the field, select eProcurement > Procurement Application Admin > Maintain Business Units > Processing Options and click the Set VAT Default link.
Recovery Amount	VAT recovery amount in the transaction currency.
Recovery Amount Base	VAT recovery amount in the base currency.

Field or Control	Description
Rebate Amount	Calculated VAT rebate amount in the transaction currency.
Rebate Amount Base	Calculated VAT rebate amount in the base currency.

Related Links

“Understanding VAT” (PeopleSoft Global Options and Reports)

Edit Requisition-Review and Submit Page

Use the Edit Requisition-Review and Submit page (PV_REQ_CHECKOUT) to edit requisition information.

This page is accessible only for open requisitions.

Navigation:

Select *Edit* in the **Select Action** field on the Manage Requisitions page. Click the **Go** button.

This example illustrates the fields and controls on the Edit Requisition - Review and Submit page. You can find definitions for the fields and controls later on this page.

Edit Requisition - Review and Submit
Review the item information and submit the req for approval. [Requisition Settings](#)

Requisition Summary

Business Unit	FRA01	FRANCE OPERATIONS	Requisition Name	0000000005
Requester	VP2	Michael Buhler	Requisition ID	0000000005
*Currency	FRF		Priority	Medium

Cart Summary: Total Amount 2,481.38 FRF

Expand lines to review shipping and accounting details [Add More Items](#)

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Monitor 16inch	FRA-02	Axis Systems	1.0000	Each	958.2300	958.23		Add	
2	Monitor 17inch	FRA-03	Axis Systems	1.0000	Each	1273.5400	1273.54		Add	

Select All / Deselect All Select lines to: [Add to Favorites](#) [Add to Template\(s\)](#) [Delete Selected](#) [Mass Change](#)

Total Amount	2,231.77	FRF
VAT Amount	249.61	FRF
Requisition Amount	2,481.38	FRF
Pre-Encumbrance Balance	2356.57	FRF

This example illustrates the fields and controls on the Edit Requisition - Review and Submit page. You can find definitions for the fields and controls later on this page.

Shipping Summary

[Edit for All Lines](#)

Ship To Location: FRA01
 Address: 112, Avenue Kleber
 Paris 75117
 Attention To: Michael Buhler
 Comments:

Requisition Comments and Attachments

Enter requisition comments

☐ Send to Supplier ☐ Show at Receipt ☐ Shown at Voucher [Add more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

Check Budget Pre-Check Budget Budget Checking Status: **Valid**

[Save & submit](#) [Save for Later](#) [Add More Items](#) [Add Request Document](#)

This example illustrates the fields and controls on the Edit Requisition - Review and Submit page. You can find definitions for the fields and controls later on this page.

Edit Requisition - Review and Submit

Review the item information and submit the req for approval. [Requisition Settings](#)

Requisition Summary

Business Unit: US001 US001 NEW YORK OPERATIONS Requisition Name: 0000000186
 Requester: VP1 Kenneth Schumacher Requisition ID: 0000000186
 Currency: USD Priority: Medium
 Card Number: Expiration Date: ☐ Use Procurement Card

Cart Summary: Total Amount 1,316.37 USD

Expand lines to review shipping and accounting details [Add More Items](#) First 21 to 30 of 30 Last

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
21	Graphics Software	USA-02		1.0000	Each	230.0000	230.00		Add	
22	Consulting	EX2018		1.0000	Each	120.0000	120.00		Add	
23	Hard-sided Cooler, 40 Qt.	10058	ERNIE'S BIKE SHOP	1.0000	Each	48.0000	48.00		Add	
24	Ice Chest, 80 Qt.	10060	ERNIE'S BIKE SHOP	1.0000	Each	32.0000	32.00		Add	
25	Co-Z Child Trailer	10031	ERNIE'S BIKE SHOP	1.0000	Each	85.0000	85.00		Add	
26	Sierra 1 Burner Stove	10040	CAMPER'S WAREHOUSE	1.0000	Each	35.0000	35.00		Add	
27	Super Shower Kit, 5 Gallon	10063	CAMPER'S WAREHOUSE	1.0000	Each	25.0000	25.00		Add	
28	Matchless 2 Burner Stove	10043	CAMPER'S WAREHOUSE	1.0000	Each	25.0000	25.00		Add	
29	Cookie's Chow Kit Utensils	10056	CAMPER'S WAREHOUSE	1.0000	Each	1.0000	1.00		Add	
30	3 Season Mummy Bag, Long	10037	CAMPER'S WAREHOUSE	1.0000	Each	120.0000	120.00		Add	

If you add an additional line to an existing requisition, the new line is numbered as the last line of the requisition.

Most field descriptions for the Edit Requisition component are located in the [Creating Requisitions](#) section. In the Edit Requisition component, some additional fields appear; these fields are discussed below.

If chunking is enabled, then requisition lines in the first chunk will appear and chunking navigation will be visible on this page.

See [Requisition Settings Page](#).

Field or Control	Description
First <#> to <#> of <#> Last	Displays the number of requisition line rows that are displayed on the page if requisition chunking is enabled. For example, if 21 to 30 of 30 is displayed. It means that the system is displaying the first 20 lines on the page and that there are a total of 30 lines. The number of requisition lines is determined by the requisition value entered on the eProcurement Installation Options page. When clicking on the > or the Last link to retrieve a new set of lines, the system warns you that the requisition will be automatically be saved prior to retrieving the next set of lines if they are changed. Note: These chunking navigation links appear only when editing an existing requisition. They are not displayed during add mode.
Track Batch	Displays the track batch (change batch) sequence number. This field only appears if you have changed a field marked for track change on the requisition change template. The first time that you save a changed requisition, the system displays Track Batch 1 in the requisition header. Each time that you make a change to the requisition, the system increases the track batch number by one. The track batch sequence number appears on the View Requisition Change Tracking History page to distinguish one change from another change and from the original field value. See Changing Requisitions.
First, <, >, and Last	The First, arrow icons (<,>), and Last links appear if requisition line chunking has been enabled on the eProcurement Installation Options page using the Requisition field. Requisition chunking splits the requisitions lines of a large requisition into more manageable groups, such as 10 lines per chunk. The number of requisition lines displayed is determined by the requisition value entered on the eProcurement Installation Options page. The chunking links enable you to move between chunks and they appear only when editing an existing requisition and not when creating a requisition. They are not hidden on the Requisition page when the total number of lines equals or is less than the chunking limit until you click the Save for Later button. When clicking the > or the Last link to retrieve a new set of lines for the first time, the system warns you that the requisition will be automatically saved before retrieving the next set of lines. This enables the system to save any changes made to the first chunk of lines. The warning message will not be issued during subsequent navigation between chunks, and it appears only once per session.

Field or Control	Description
	The Sourced to Purchase Order icon displays to the right of the Line number and indicates that the requisition line has been sourced to a purchase order line. If the line has not yet been sourced to a purchase order, no icon appears.
	The Unavailable for Edit icon displays to the right of the Line number and indicates that the requisition line cannot be changed. Users cannot edit requisition lines when: • The line has been submitted for an RFQ (request for quote). • Sourcing is in process for the requisition line. • A sourcing event is in process for the line item. • The line is sourced to PeopleSoft Inventory. • The line is a Services Procurement requisition line that has been sourced.
	Click the Details button to access the Line Details (PV_REQ_LINE_DTLS) page to change requisition line details.
	Click to have the system recalculate and update VAT amounts for the requisition.
VAT Amount (value added tax amount)	Displays the amount of value added tax (VAT) calculated on a VAT-enabled requisition. It does not appear when the Calculate VAT on Requisition check box at Purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment, the VAT_DETAILS eProcurement role action is not used, and the user eProcurement role is not added to the user ID profile. In addition, for Purchasing Requisition in a VAT enabled Business Unit, VAT Amount and icon also do not appear when the User ID Preferences - Requisition Authorizations for Allowed Requisition Actions of View/Override VAT Details is not selected.

Field or Control	Description
Pre-Encumbrance Balance	Displays the pre-encumbrance balance amount after requisition is successfully budget checked. When you use commitment control, the system deducts each type of financial obligation from the budget and tracks it according to obligation type. This enables you to determine the money that you have committed in pre-encumbrances. The system extracts these values from commitment control tables by passing the business unit, document ID, and other key information that depends on the display. The system displays this field only when commitment control for purchasing is enabled and if the document has been budget checked successfully at least once. In addition, a default commitment detail ledger must be selected on the Ledgers For A Unit – Commitment Control Options page so that the accounting entries can be summarized to display the respective pre-encumbrance balance for the requisition. Pre-encumbrance balance appears in the transaction currency of the requisition and is based on the transaction budget date, general ledger unit, and commitment control ledger group. Pre-encumbrance balance can be partially or fully liquidated from purchase orders. Click the Pre-Encumbrance Balance amount hyperlink to view Requisition Accounting Entries. You can use this page to view accounting information details including the commitment control ledger group and transactions that have been performed against the requisition.
Delete	Click to delete selected requisition lines. You cannot delete a requisition line that has been sourced to a purchase order. You cannot use this button to delete a requisition line that has not passed budget checking when Commitment Control is used.
Current Change Reason	Click this link to access the Change Reason page, where you can view the reason code and comments attached to a change request. See Change Reason Page.
Preview Approvals	Click this link to save the requisition first before a pop-up modal window of the workflow approval map is displayed within Edit Requisition – Review and Submit page if all requisition lines are available for sourcing. It will display a message if one of the requisition lines is sourced to Purchase Order. If the requisition is in add mode, when you click this link, the requisition is automatically saved and a modal window of the workflow approval map within Edit Requisition – Review and Submit page will pop up.
Save & Submit	Click to save the requisition and submit it for approval, sourcing, and dispatching to a supplier.

Field or Control	Description
Save for Later	Click to save the requisition for later review or submission.

See [Understanding Requisition Chunking](#)

Requisition Details for <Requester> Page

Use the Requisition Details for <Requester> page (PV_REQ_CANCEL) to cancel a requisition.

Navigation:

On the Manage Requisitions page, select *Cancel* in the **Select Action** field. Click the **Go** button.

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

Requisition Details for: **Kenneth Schumacher**

Business Unit US001

Date 12/06/2012

Requisition Name 0000000174

Status Approved

Requisition ID 0000000174

Total 500.00 USD

Line Details						
Line	Item Description	Status	Price		Qty	Total
1	Desktop Boxware	Approved	500.00000	Each	1.0000	500.00

[Return to Manage Requisitions](#)

Click a line item link to review the details of that line item.

Field or Control	Description
Cancel Requisition	Click to cancel a requisition. You can cancel any requisition for which a purchase order is not already submitted.

Approving Requisitions

Within PeopleSoft eProcurement, the approval of a requisition is handled by the approval workflow framework. After a requisition is created, the system routes the transaction to an approver. The approver can view and take action in two ways: using their worklist or navigating directly to the Manage Requisition Approvals page. The approver can preview, in a graphical format, the path that the requisition approval will take, view who has already approved the requisition, and see any comments that previous approvers have entered. Once a requisition has completed the approval process, the requisition can be sourced to a material stock request or purchase order.

See [Performing Approval Tasks for Requisitions](#).

Requisition Inquiry Skill Chatbot

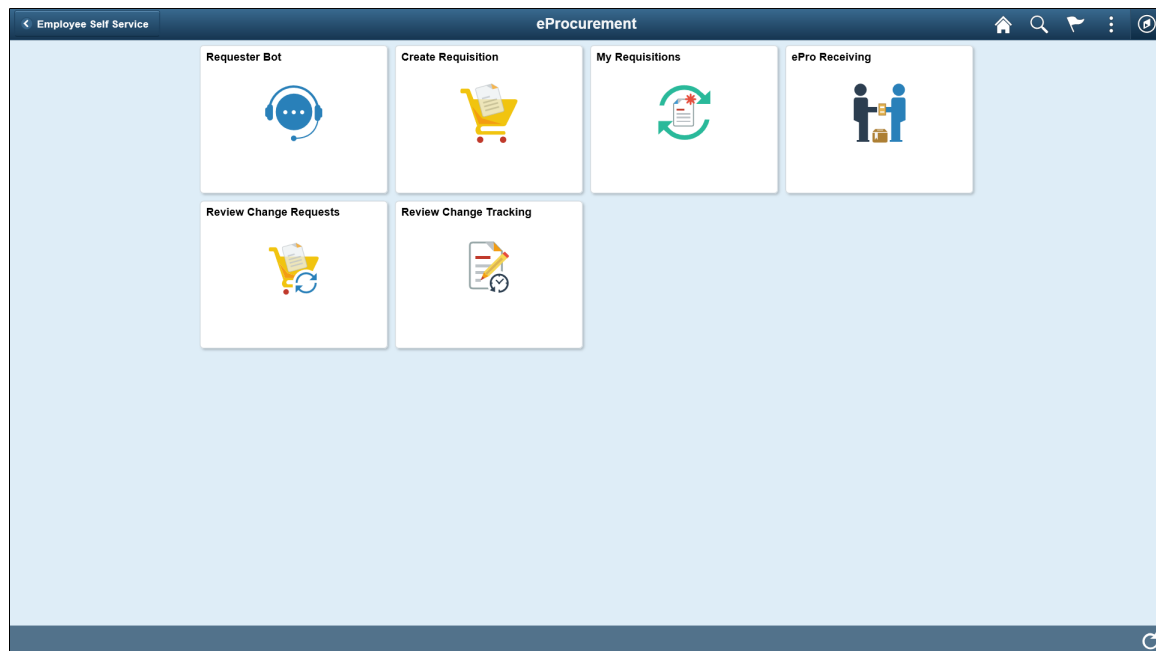
Understanding Requisition Inquiry Skill

Requisition Inquiry Skill uses the Oracle Digital Assistant (ODA) platform for interacting with users to help them perform certain tasks.

The Requisition Inquiry Skill allows requesters to quickly search for their requisition items and view the status of items in the Request Lifespan. It also saves the time and effort searching for requisitions within the Manage Requisitions component each time to know the current status of the requisition and its corresponding details. Requesters can interact with the digital assistant using voice command or text message. Based on the digital assistant's response, they can begin the interaction. For example, to know the status of a requisition item, a requester can enter the item ID or item description (complete or partial) and proceed the conversation based on the options displayed on the chat window.

The digital assistant can respond to questions about the requisition statuses, such as **Open**, **Pending**, **Approved**, **Denied**, **PO(s) Created**, **PO Partially Created**, **PO(s) Dispatched**, **PO Partially Dispatched**, and **Received**.

This example illustrates the fields and controls on the eProcurement page - Requester Bot tile.



Selecting the Requester Bot tile on the eProcurement page launches the Requester Bot chat window. The requester can start the inquiry by entering a general greeting or a search text; no need to use explicit and codified instructions. The digital assistant proactively tells the requester how to proceed the conversation.

The digital assistant consists of the following Intents:

- Greeting — Greeting Message
- ExitGreeting — Exit
- ItemDesc_Status — Match Item Description
- ItemID_Status — Match Item ID

The digital assistant uses the following Services:

- EPRO_GETREQ_FORITEM — To get the list of requisitions that match an item.
- EPRO_GET_ITEM_DESC — To get the list of items from the requisitions that match an item description.
- EPRO_REQ_ID_STATUS — To display additional requisition line information (depending on the line status) when the **More Details** link is selected.

For more information about ODA, see [Oracle Digital Assistants and Skills](#).

Setting Up Requisition Inquiry Skill

This topic discusses how to configure the Requisition Inquiry Skill.

Pages Used to Set Up Requisition Inquiry Skill

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Bot Definition Page	EOCB_BOTDEFN_FL	To view the existing Bot configurations and newly define a bot. To display the Requester Bot tile on any application homepage, the administrator must follow the steps described in the Enabling Requisition Inquiry Skill section. For more information, see PeopleTools: <i>Administering Content References</i>.
Branding Template Page	EOCB_BRNDTMPL_FL	To define the template to brand the chatbot.

For more information on setting up the bot, see “Creating Bot Definitions” (Enterprise Components).

Enabling Requisition Inquiry Skill

Use the Fluid Attributes tab (PORTAL_GROUPLET) on the Content Ref Administration (PORTAL_CREF_ADM) page to add the Requester Bot tile to any homepage.

Navigation:

PeopleTools > Portal > Structure and Content > Fluid Structure and Content > Fluid Pages > Employee Self-Service

Select the Edit option for the Requester Bot label.

This example illustrates the fields and controls on the Content Ref Administration page.

General | Security | Fluid Attributes

Root > Fluid Structure Content > Fluid Pages > Employee Self-Service >

Content Ref Administration

CreatedBy VP1

Name EP_EPRO_CHATBOT

Parent Folder Employee Self-Service

*Label Requester Bot

Copy object

Select New Parent Folder

Long Description (254 Characters)

Product

Sequence number

Owner ID

Usage Type Target

Storage Type Remote by URL

*Valid from date 09/30/2019

Valid to date

Creation Date 09/30/2019

☐ WSRP Producing

☒ No Template

☒ Fluid Mode

☒ Display on Small Form Factor

Create Content Reference Link Add Content Reference Test Content Reference

URL Information

*Node Name LOCAL_NODE

URL Type PeopleSoft Component

Component Parameters

*Menu Name EOCB_MENU_FL *Market GBL *Component EOCB_CLIENT_FL

Additional Parameters BOTID=EPRO_REQUESTER_BOT

Example: name1=value1&name2=value2

☐ Hide from portal navigation ☐ Hide from MSF navigation IWC Message Events

Content Reference Attributes

Name

Label

Attribute value

☒ Translate Attribute Information

Select the Fluid Attributes tab.

This example illustrates the fields and controls on the Structure and Content - Fluid Attributes page.

GeneralSecurityFluid Attributes

Root > Fluid Structure Content > Fluid Pages > Employee Self-Service >

Tile Information

Image Name

☐ Interactive

Display InModal

☐ Disable Main Hotspot

Modal ParameterssStyle@frame-pt_chatclientpage;bAutoclose@0

Height1

☐ Autosize

Width1

☐ Resizable

Refresh Timer0

Event Name

Dynamic Tile Content

URL TypeNone

Tile Repository

Select a folder below to create a link to the Tile Repository. If the folder selection is disabled, this Tile is already available in the Tile Repository.

FolderEPCO_EMPLOYEE_SS_FL

Folder LabelEmployee Self-Service

Include In Repository

☒ Homepage

☒ Dashboard

☒ NavBar

In the Tile Repository grid, select the Homepage check box so that the Requester Bot tile displays on the Employee Self Service homepage.

Using Requisition Inquiry Skill

This topic discusses how requesters can interact with the Requisition Inquiry Skill and view their requisition details.

Pages Used to Interact with Requisition Inquiry Skill

Page Name	Definition Name	Usage
Requester Bot tile	EP_PV_EPRO_CHATBOT	To access the Requester Bot chat window and begin the interaction.

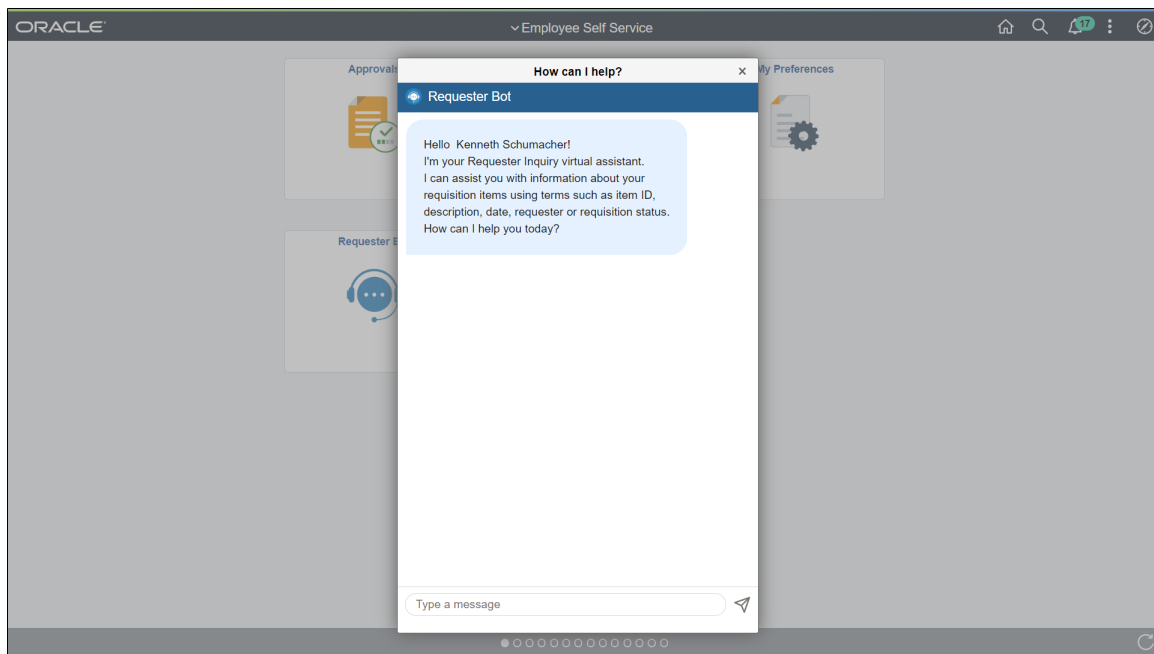
Requester Bot Tile

Select the Requester Bot tile to launch the Requester Bot chat window and quick start the conversation with the chatbot. You can use the chatbot to inquire about the status of requisitions and items sourced by purchase orders as well as inventory. The bot displays matching results (up to 50 rows) from different business units. You can also query about the status of requisitions created on behalf of authorized requesters for different business units.

Navigation:

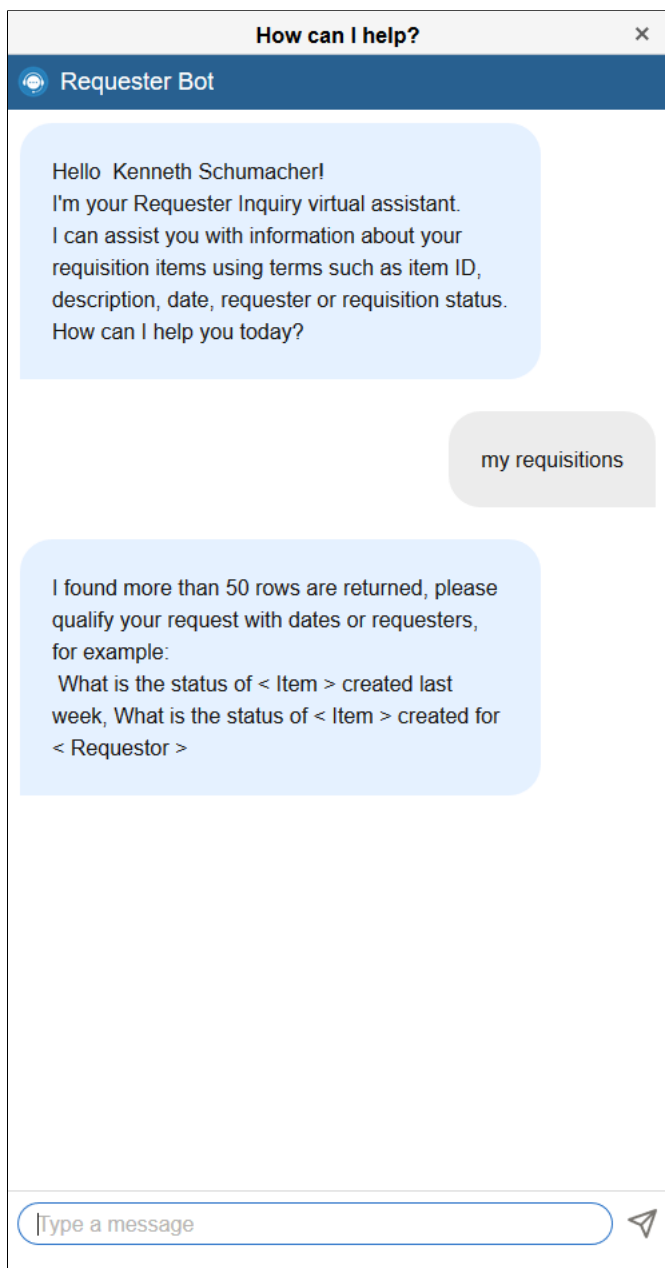
Click the Requester Bot tile on the eProcurement page.

This example illustrates the fields and controls on the Requester Bot chat window.



The bot confirms its readiness to provide assistance by displaying a welcome message. You can start the conversation either by entering a greeting message or a search string.

This example illustrates the fields and controls on the Requester Bot - Get Started.

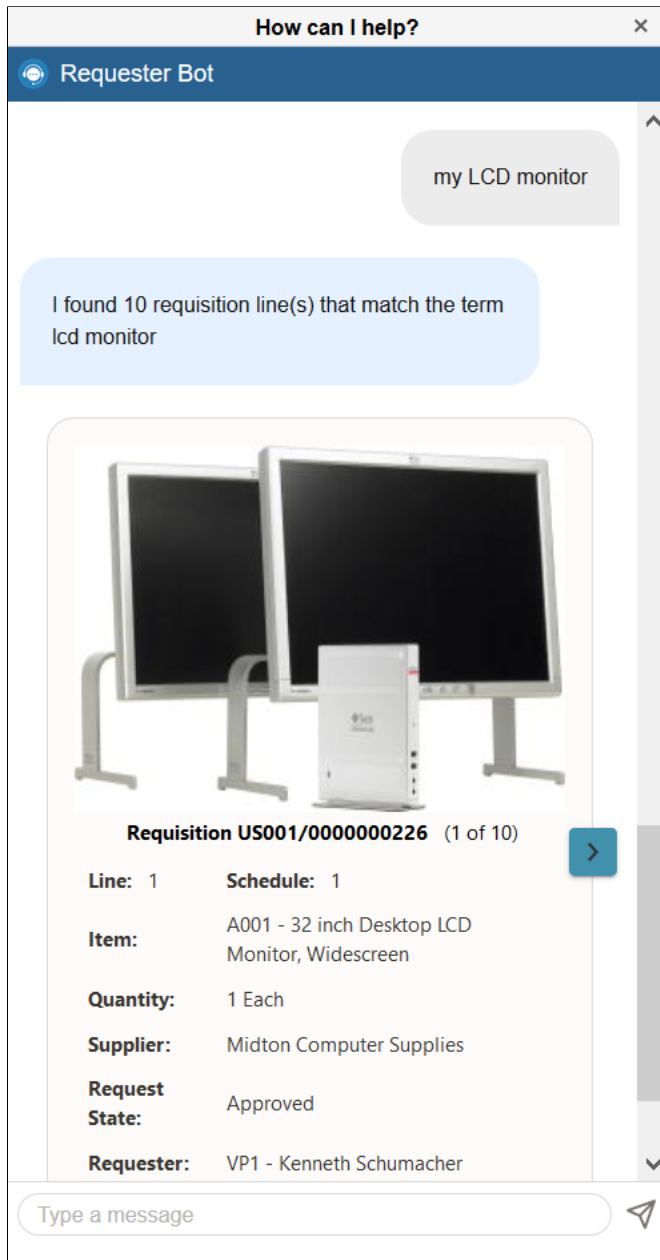


To narrow down your search results, enter appropriate queries. The bot can identify items either by the item ID or item description (item description can include space between the words) without relying on specific keyword combinations or quotation marks. For example, you can simply enter your query as *My LCD Monitor*.

You can inquire about the item status information over a specific time period. For example, *Requisitions submitted last week* or *My recent items*.

The bot also responds to your queries about the status of items such as *Open*, *Pending*, *Approved*, *Denied* and so on. For example *Denied orders*.

This example illustrates the fields and controls on the Requester Bot – View Results.



Based on your query, the bot retrieves a set of results along with item images if present. Go through the list and select an item. To view more information about a requisition, click the *Show Transaction Details* button.

This example illustrates the fields and controls on the Requester Bot – View details.

The screenshot shows a chat window titled "How can I help?" with a close button (X). The chat header is "Requester Bot". The main content area displays the following details for Line 1:

- Line:** 1
- Schedule:** 1
- Item:** A001 - 32 inch Desktop LCD Monitor, Widescreen
- Quantity:** 1 Each
- Supplier:** Midton Computer Supplies
- Request State:** Approved
- Requester:** VP1 - Kenneth Schumacher

Below the details is a button labeled "Show Transaction Details". Further down, there is another button labeled "Show Transaction Details". Below that, a blue bubble contains the text: "Details for requisition US001/0000000226 Line: 1". Below this, a box titled "Requisition" contains the text: "Requisition **US001/0000000226** is **Approved**. For more transaction details, please select the following link". Below this text is a dark blue button labeled "Take me there". At the bottom of the chat window is a text input field labeled "Type a message" and a send button (paper plane icon).

For each requisition, the item's image and the details such as the Business Unit associated to the requester, Requisition ID, Line number, Schedule, Item and description, Quantity, Request State, and Requester details are shown. Multiple schedules, if available, can also be viewed.

Click the *Take me there* button to navigate to the respective application pages. Based on the request state of the requisition, the system displays Requisitions Details, Approvals, Material Stock Requests, PO Inquiry, POA Inquiry, ASN Inquiry, Manage Receipts pages, and so on.

After getting the required details, you can exit the conversation.

PeopleSoft Mobile Approvals

Understanding Mobile Approvals

The PeopleSoft Mobile Approvals feature provides an option to approve transactions using a mobile device using the Fluid User Interface as opposed to using the Classic User Interface. Approvers continue to take Application Workflow Engine (AWE) actions on PeopleSoft transactions pending their approval, but can do so using any form factor. See [Access Approval Pages](#).

Important! PeopleSoft Financials and Supply Chain Management is converting from PeopleTools - Mobile Approval Platform (MAP) technology to Enterprise Components - Fluid Approval technology. This chapter discusses Enterprise Components - Fluid Approval only. For information about PeopleTools MAP technology, see previous image documentation.

Note: When taking PeopleSoft Image 20, if you select “make me current” you receive Fluid approval technology for applications that previously used MAP technology. In addition, if you pull any MAP main Unit of Work (UOW) from a previous image, it switches all MAP applications to a Fluid Approval application.

Enterprise Components - Fluid Approval Framework technology consists of; Enterprise Objects Approval Workflow (EOAW), Application Workflow Engine (AWE), and Enterprise Objects Page Composer (EOPC). A minimum tools release of 8.54 is required for Fluid Approvals.

In order to use the Mobile Approval feature, applications must utilize the Approval Framework, also known as Approval Workflow Engine (AWE). All transactions must be created in the database, and adhere to the Approval Framework logic and configuration within each application.

Mobile Approvals provides a convenient option to review and approve pending requisitions, including these tasks from a mobile device, depending on the application:

- Approve, deny, push back, or hold pending requisitions at the header level and the line level.

You can perform approval actions for one or more requisitions, depending on setup.

- Add comments for approval actions.
- View approvals that other approvers have approved.
- View requestor comments and attachments associated with the pending transaction.
- View header and line level comments and attachments.
- View distribution details for the line item.

ChartField Display Templates are used to extend ChartField configuration to control the display of individual ChartFields on PeopleSoft Fluid components. It displays ChartFields in a consistent manner on PeopleSoft Fluid transaction pages across PeopleSoft products. For mobile approval the default

ChartField display template *ALLCFS* is used for all users, a permission list, or user ID. Use the “Assign by Key Field Values page” (Application Fundamentals) to assign ChartField display template to the fluid approval process.

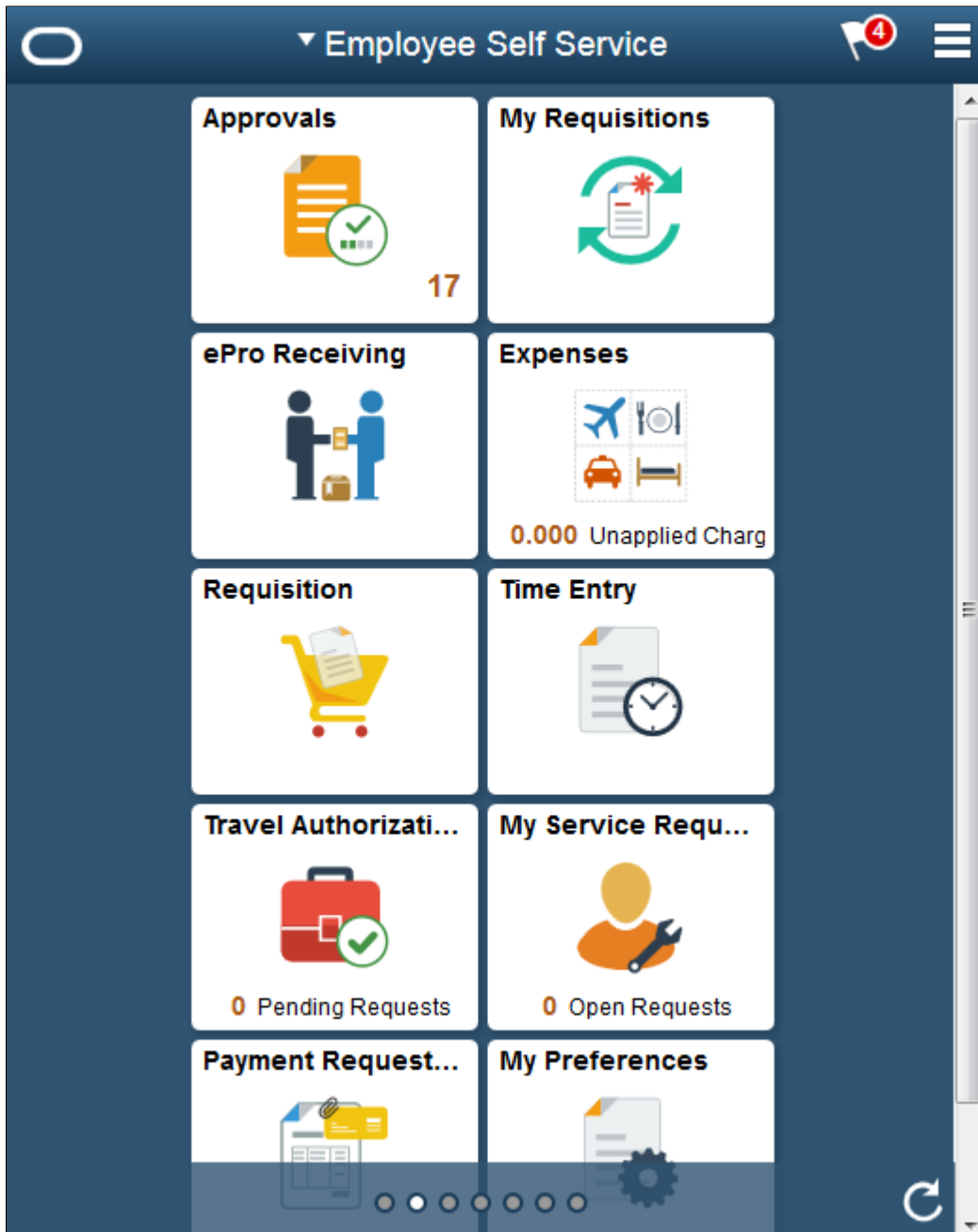
Access Approval Pages

The PeopleSoft Fluid User Interface is designed for users to access PeopleSoft pages using multiple form factors:

- SFF: Small Form Factor, such as smart phones.
- MFF: Medium Form Factor, such as tablets.
- LFF: Large Form Factor, such as large tablets.
- XLFF: Extra Large Form Factor, such as desktops.

When using a mobile device, you can access the approval page by selecting the Approvals tile from the Employee Self Service page. When you access the approval page by selecting the Approvals tile, the first page you see is the Pending Approvals page. The Pending Approvals page displays differently depending on your form factor. Approval transactions listed for each user depends on the permission level established for the user logged in.

This example illustrates the fields and controls on the Employee Self Service page.



Related Links

“Setting Up and Using Fluid Approvals” (Enterprise Components)

[Configuring Mobile Approvals](#)

[Approving Requisitions Using PeopleSoft Fluid User Interface](#)

Configuring Mobile Approvals

Prerequisites

For Enterprise Components - Fluid Approval Technology, the prerequisites are:

1. PeopleTools 8.54 is the minimum requirement.
2. Follow the instructions in the Mobile Approval Installation document, which can be accessed on Oracle's My Oracle Support (support.oracle.com), document number 2166359.1.
3. Enable and configure the PeopleSoft applications for Approval Framework.

See "Understanding the Approval Framework Feature" (Approval Framework).

Pages Used to Configure PeopleSoft Mobile Approvals

Page Name	Definition Name	Usage
"Fluid Approval Setup - General Settings Page" (Enterprise Components)	HMAP_MBL_TYPE_SET	Configure the general settings for Mobile Approvals.
"Fluid Approval Setup - Transactions Page" (Enterprise Components)	HMAP_MBL_TYPE_SET2	Configure the transaction settings for Mobile Approvals.
"CAVF Configuration Setup Page" (Enterprise Components)	EOATT_CONFIG_DTLS	Set up the Comments and Attachments View configuration.

Approving Requisitions Using PeopleSoft Fluid User Interface

This section discusses about approving requisitions using the fluid user interface.

Click to watch a short video about [PeopleSoft Fluid Requisition](#).

Pages Used to Approve Requisitions in the PeopleSoft Fluid User Interface

Page Name	Definition Name	Usage
Pending Approvals Page	Not Available	Review and approve multiple requisitions. Access header details for a specific requisition.
Approval - Requisition Header Detail Page	Not Available	Review and approve a single requisition. Access line item details for a specific line.

Page Name	Definition Name	Usage
Approval Line Detail Page	Not Available	Review display-only line details.
Approvals History Page	Not Available	Review a list of requisition approvals. Access the approval history for a specific requisition.
Approvals History - Requisition Header Page	Not Available	Review the approvals history for a single requisition. Access line item details for a specific line.

Pending Approvals Page

Use the Pending Approvals – Requisition list page to review and approve multiple requisitions. Access header details for a specific requisition.

Navigation:

Employee Self Service > Approvals

On the Pending Approvals - View By Type page, select *Requisition* to view the list of all pending requisitions for approval.

This example illustrates the fields and controls on the Pending Approvals page (1 of 2).

The screenshot shows the 'Pending Approvals' page with a sidebar on the left containing navigation links: All (46), Bidder Registration (2), Draft Write-off (3), Journal Entry (1), Maintenance Refund (2), Maintenance Write-off (3), Payment Request (3), Payment Write-off (8), Purchase Order (2), Requisition (5), Supplier (4), and Supplier Change Request (3). The 'Requisition' link is selected. The main area displays a table of requisitions with columns for selection, requisition details, and status. At the top right, there are buttons for 'Approve', 'Deny', and 'Pushback'. Below the table is a section for 'Approver Comments'.

Pending Approvals			
View By Type		Requisition	
☐	Requisition	US003 / 0000000024 Kenneth Schumacher	Routed 02/03/2025
☐	Requisition	US003 / 0000000025 Kenneth Schumacher	Routed 02/03/2025
☐	Requisition	US003 / 0000000026 Kenneth Schumacher	Routed 02/03/2025
☐	Requisition	US003 / 0000000027 Kenneth Schumacher	Routed 02/03/2025
☐	Requisition	US003 / 0000000028 Kenneth Schumacher	Routed 02/03/2025

Review header information for the requisitions currently routed for approval. Select a particular requisition to view the header details. You can select any number of requisitions on this page and perform a mass action on the selected requisitions. You can also use the filter to narrow down the requisitions displayed on this page. You can select and review requisitions by their priority (Rush, High, Medium, or Low).

Field or Control	Description
Approve, Deny, or Pushback	Perform a mass action by selecting multiple transactions, then selecting an approval action button.

Field or Control	Description
Approver Comments	Enter comments in the text entry field.

Note: For information about how to add a tile to a PeopleSoft Fluid Home page, see “Adding Homepages and Tiles” (Application Fundamentals).

The tile can show the total number of pending approvals. If no pending approvals are available, the tile does not display a number count.

Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of notifications in one central location. Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.

For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

Related Links

“Setting Up and Using Fluid Approvals” (Enterprise Components)

[Configuring Mobile Approvals](#)

Approval - Requisition Header Detail Page

Use the Pending Approvals - Requisition header approval page to review and approve a single requisition. Access line item details for a specific line.

Navigation:

Select a requisition in the list on the Pending Approvals - Requisition list page.

This example illustrates the fields and controls on the Pending Approvals - Requisition Header Approval page. You can find definitions for the fields and controls later on this page.

Requisition

Request for US001/0000000172

1,234.00 USD

Approve

Deny

Pushback

Header is pending your approval

Summary

Business Unit

US001

Requisition ID

0000000172

Routed Date

July 18, 2019

Requisition Date

July 18, 2019

Requester

Kenneth Schumacher

Entered by

Kenneth Schumacher

Approval Justification

COMMENTS TEST

Budget Header Status

Not Budget Checked

Approval Justification Attachments

Edit Requisition

More Information

View Printable Version >

Lines

1 row

Line Number	Item Description	Merchandise Amount
1	TEST	1,234.00 USD >

Approver Comments

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

Change Request ✕

Business Unit US003
Requisition ID 0000000016

1 rows

Line 1	Prior Value 11.00
Sched 1	Changed Value 21.00
Field Name QTY_REQ	

This example illustrates the fields and controls on the Requisition Header Comments and Attachments. You can find definitions for the fields and controls later on this page.

Requisition Header Comments and Attachments

Business Unit US003
Requisition ID 0000000005

Header Details

▼ **Comment 1**
Test Header Comments 1 Without Attachments

▼ **Comment 2**
Test Header Comments 2 With Attachment

Sequence	Attached File
1	 Additional_Details.pdf

The approval chain reflects approval status generated by the Application Workflow Engine (AWE). For more information about using AWE workflows, see.

“Approval Framework Overview” (Approval Framework)

Field or Control	Description
Approve, Deny	Perform an action on this requisition by selecting an approval action button. Upon selecting an action, you have the option to select <i>Submit</i> to continue the action or <i>Cancel</i> to back out of the action. Upon submitting the action, the system generates a message that the action is successful. You can also add comments before submitting for approval.
Pushback	Select to pushback the request.
Approval Justification Attachments	Select to view the attachments regarding the approval.
Lines	Select a requisition line item to view the line details.
Approver Comments	Enter comments in the text entry field.
Approval Chain	Select to view the approval chain information. You can expand or collapse approval information for each line by selecting the glyph icon. You can also select the approver name to view approver details.

More Information

Field or Control	Description
Header Comments and Attachments	Select the Header comments and attachments to view the collated header comments and attachments for the requisition.
Change Request	Select to view the change request details for the requisition.

Related Links

“Configuring and Implementing the Comments and Attachments View Framework” (Enterprise Components)

Approval Line Detail Page

Use the Approval Line Detail page to review line details that includes shipping information and line level comments and attachments.

Navigation:

Select a requisition line item in the Lines section on the Requisition header approval page

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

Back to Header

Approval Line Detail



Calculator, Electric

675.00 USD

Line Details

Business Unit US003

Line 1

Supplier EASTBAY-001

Price 45.00 USD

Requisition ID 0000000005

Item ID EX2009

Quantity 15 EA

Ship To US001

Shipping Information

Schedule	Ship To	Quantity	Price	Amount	Attention	Due Date
1	US001	15 EA	45.00 USD	675.00 USD	Calvin Roth	>

More Information

Line comments and attachments >

Field or Control	Description
Shipping Information	Select to view the fluid approval distribution details for the line item.
More Information	Select the Line comments and attachments to view all the collated line comments and attachments specific to the line item.

This example illustrates the fields and controls on the Distributions page.

Distributions ×

Fluid Approval Distribution

Line 1

Schedule 1

Item Description Calculator, Electric

Merchandise Amount 675.00 USD

Quantity 15.0000 EA

Distribution Line ◇	Requisition Quantity ◇	GL Business Unit ◇	Merchandise Amount ◇	Currency Code ◇	Account ◇	Alternate Account ◇	Operating Unit ◇
1	15.0000	US001	675.00	USD	631000		

This example illustrates the fields and controls on the Requisition Line Comments and Attachments page.

Requisition Line Comments and Attachments
×

Business Unit

US003

Requisition ID

0000000005

Line

1

Item Description

Calculator, Electric

▼
Comment 1

Test Line Comments 1 with 1 Attachment

Sequence	Attached File
1	Laptop.JPG

▼
Comment 2

Test Line Comments 2 Without Attachments

▼
Comment 3

Sequence	Attached File
1	Order_Details.txt

Approvals History Page

Use the Approvals History- Requisition list page to review a list of requisition approvals. Access the approval history for a specific requisition.

Navigation:

From a Pending Approvals - Requisition page, select the Actions icon on the page banner. Select *Approvals History*. Then select *Requisition* on the View By - Type page.

This example illustrates the fields and controls on the Approvals History - Requisition list page.

Approvals History

View By

Type

All

5

Requisition

5

History displays approvals for last 30 days.

Requisition

1,750.00

USD

US003 / 0000000003 Calvin Roth

Medium Priority

Approved on 02/03/2025

Updated 02/03/2025

Requisition

70,000.00

USD

US003 / 0000000029 Kenneth Schumacher

High Priority

Approved on 02/03/2025

Updated 02/03/2025

Requisition

70,000.00

USD

US003 / 0000000030 Kenneth Schumacher

Medium Priority

Approved on 02/03/2025

Updated 02/03/2025

Requisition

70,000.00

USD

US003 / 0000000031 Kenneth Schumacher

High Priority

Approved on 02/03/2025

Updated 02/03/2025

Requisition

70,258.00

USD

US003 / 0000000032 Kenneth Schumacher

Low Priority

Approved on 02/03/2025

Updated 02/03/2025

Approvals History - Requisition Header Page

Use the Approvals History - Requisition header approval page to review the approvals history for a single requisition. Access line item details for a specific line.

Navigation:

Select a requisition in the list on the Approvals History - Requisition list page.

This example illustrates the fields and controls on the Approvals History - Requisition header approval page.

Approvals History

Requisition

Request for Computer Request

5,745.96 USD

Approved on 09/26/2014

Summary

Business Unit US003

Requisition ID 0000000069

Routed Date September 26, 2014

Req Date September 26, 2014

Requester Edmund Donahue

Entered By Edmund Donahue

Budget Status Not Budget Checked

Lines

1 3.70 GHz Desktop PC, 4 GB... 4,150.00 USD

2 Printer - Color Laserjet; 600 ... 1,595.96 USD

Approval Chain

Fiscal Approval

Computer Request

Approved

Fiscal Approval

Approved

Rosanna Channing.

Supervisor by Userid

09/26/14 - 5:04 PM

Using the Buyer Center

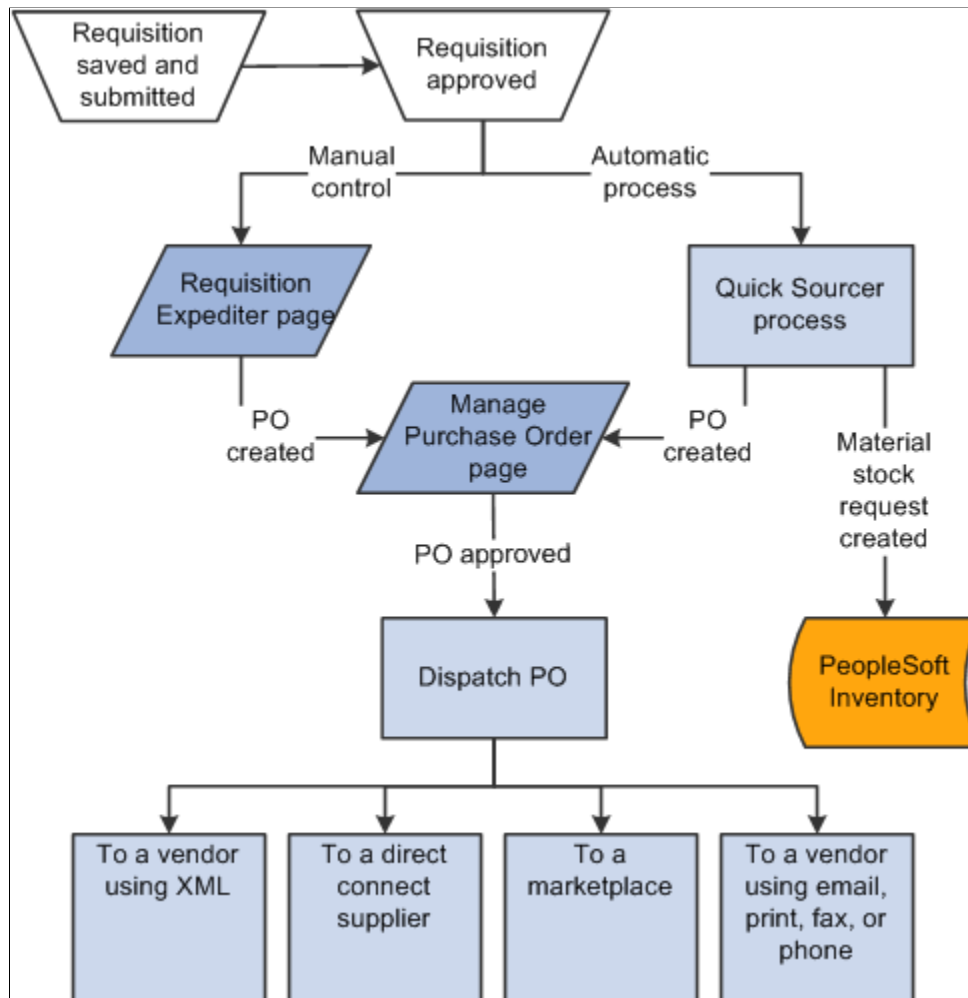
Understanding the Buyer Center

The Buyer Center is a PeopleSoft eProcurement page that is designed for organization buyers. The Buyer Center page provides numerous links to PeopleSoft Purchasing and enables you to:

- Process requisitions and change requests from requesters.
- Add purchase orders and change orders.
- Perform tasks that are related to a purchasing position.

The Buyer Center enables buyers to turn requisitions into purchase orders and dispatch them. This diagram illustrates the process flow from a requisition, through sourcing, to a dispatched purchase order:

This diagram illustrates the process flow from a requisition.



Related Links

[Creating Requisitions](#)

[Approving Requisitions](#)

[Understanding Purchase Order Dispatch](#)

Common Elements Used in Buyer Center

<i>Field or Control</i>	<i>Description</i>
Search	Click to initiate a search for the purchase orders or requisitions that meet the criteria. A purchase order must match all of the search criteria that you enter. If you cannot find the purchase order that you want, remove some of the search criteria to broaden the search, and try again.
Business Unit	Displays the purchasing business unit.
Attachments	Click to display any files that are attached to this transaction.
P-card (procurement card)	Displays if a purchase order uses a procurement card to purchase items from the supplier.

Using the SRM Dashboard

The SRM Dashboard is a centralized portal page with multiple pagelets that provide buyers with essential information to assist them with their daily jobs in one location. These buyer-facing pagelets are delivered with the SRM Dashboard and can be accessed if PeopleSoft Purchasing or PeopleSoft eProcurement are installed.

You may add any the delivered pagelets to the SRM Dashboard page.

The information that appears on each pagelet is by *buyer* or *buyer manager*. When a buyer logs into the system, the first page that appears is their home page with their selected pagelets. The information that appears on each pagelet is only those POs or requisitions on which they are specified as the buyer. If a buyer is responsible for multiple purchasing business units, the POs and requisitions for all purchasing business units will appear.

Related Links

“Understanding the SRM Dashboard” (PeopleSoft Source to Settle Common Information)

[Setting Up and Maintaining Users](#)

“Understanding PeopleSoft eSupplier Connection Pagelets” (PeopleSoft eSupplier Connection)

Managing Purchase Orders

This section discusses how to manage purchase orders.

Page Used to Manage Purchase Orders

Page Name	Definition Name	Usage
Managing Purchase Orders Page	PV_PO_LIST	Manage POs by adding a new PO, changing an existing PO, or creating a change order.

Managing Purchase Orders Page

Use the Manage Purchase Orders page (PV_PO_LIST) to manage POs by adding a new PO, changing an existing PO, or creating a change order.

Navigation:

eProcurement > Buyer Center > Manage Purchase Orders

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

Manage Purchase Orders

Search Purchase Orders

Business Unit

US001

Supplier ID

PO ID

Buyer

VP1

Kenneth Schumacher

Date From

02/03/2013

Date To

02/10/2013

Search

Clear

Add New PO

Filter By

All

Attachments

P-card

List of Purchase Orders

Personalize | Find | View All | First 1 of 1 Last

PO ID	PO Date	Status	Buyer Name	Supplier	Supplier Name
0000000253	02/07/2013	Approved	Kenneth Schumacher	SCM0000001	BIKE-001

Use the top section of this page to search for existing POs.

Field or Control	Description
Supplier ID	Enter a Supplier ID to limit the list of purchase orders to a specific supplier.
PO ID (purchase order ID)	To further narrow the list of POs, enter the ID to display a specific PO.

Field or Control	Description
Buyer	Enter the name of the buyer on the PO. You can select only buyers that are authorized for the user ID on the User Preferences page.
Date From and Date To	This is a range of dates from which the system will limit the view of POs within the list of POs.
Filter By	Select the method by which you want to filter POs that appear in the list. You can filter by: <i>All</i> , <i>Approved</i> , <i>Dispatched</i> , <i>Open</i> , or <i>Pending</i> .
Add New PO (add new purchase order)	Click to access the Maintain Purchase Order page, where you can create a new PO.

List of Purchase Orders

Field or Control	Description
PO ID (purchase order ID)	Click to access the Maintain Purchase Order page, where you can review and maintain header and line-level details for a PO.
Supplier	Displays the Supplier ID used on this PO. This is the supplier to whom the PO is sent.

Related Links

[“Understanding User Preferences” \(Application Fundamentals\)](#)

[Setting Up Installation Options](#)

[Setting Up Attachments for Transactions](#)

Expediting Requisitions

This section discusses how to review requisitions created by employees and review and change staged purchase order details.

Pages Used to Expedite Requisitions

Page Name	Definition Name	Usage
Expedite Requisitions Page	PV_PO_REQ_SOURCE	Review requisitions created by employees.

Page Name	Definition Name	Usage
Attachments Page	PV_REQ_PO_ATTCH	View the attachments added to this requisition line.
<u>Staged Purchase Order Page</u>	PV_PO_REQ_CREATE	Review and change the staged PO.

Expedite Requisitions Page

Use the Expedite Requisitions page (PV_PO_REQ_SOURCE) to review requisitions created by employees.

Navigation:

eProcurement > Buyer Center > Expedite Requisitions

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

Expedite Requisitions

[New Window](#) | [Help](#) | [Personalize Page](#)

Search Requisition Schedule Lines

To locate requisition schedule lines that have been approved and are available for manual conversion into purchase orders, edit the criteria below and click the Search button.

*Business Unit: Priority:

Requisition ID: Category:

Requisition Name: Supplier Name:

Requester: ☒ Include Lines With No Supplier

Buyer:

Requisition Type:

Requisition Schedule Lines

1 of 1

Include	Requisition ID	Requisition Type	Priority	Line	Sched	Item Description	Select	Supplier Name	Location	PO Qty	UOM	Price	Curr.	Amount Only
☐	000000175	Standard	Rush	1	1	1337 Desktop PC	☐	STIPLES-001	1	1.0000	EA	258.00	USD	N

☐ Include All/Exclude All ☐ Select All/Deselect All

Build Purchase Order

To send all included requisition schedule lines to the staging tables where they will be converted into purchase orders, select a default buyer and click the Submit button. The default buyer is used on the purchase order only if another buyer is not found on the staging tables or default hierarchy, or if the transactions are consolidable by buyer.

*Default Buyer ID: ☒ Build POs as Approved

[Go to Process Monitor](#)

Use this page to define requisition search criteria and to display requisitions. After completing the search criteria, click the **Search** button to display any requisitions that meet the criteria. Click the **Clear** button to clear the page of requisitions and enter new search criteria. The requisition must meet the following conditions before it can be selected:

- The requisition line status must be *Approved*.
- The inventory source flag on the requisition line must be *N (no)*.
- The request for quote indicator on the requisition line must be *N (no)*.
- The **In Process** flag on the requisition line must be *N*. When one line on a requisition is selected for sourcing, the **In Process** flag on the requisition line is set to *Y (yes)*, indicating that the line can't be

touched until sourcing is complete. Once sourcing is complete, the **In Process** flag is turned off and can be changed.

- The **Hold Status** on the requisition header must be *N*.
- The **Budget Header Status** on the requisition line must be *V (valid)*.
- The **Balance Status** on the requisition schedule must be *I (in balance)*.
- The **Open Quantity** or **Open Amount** on the requisition distribution must be greater than *zero*.

After requisitions appear, you can change or add a supplier or create a PO.

Search Requisition Schedule Lines

Use the Search Requisition Schedule Lines group box to define your search criteria for the requisition schedule lines displayed below.

Field or Control	Description
Business Unit	Enter the purchasing business unit.
Priority	Select to search the requisitions based on the priority: Rush, High, Medium, or Low.
Category	Enter a single item category to search.
Requisition ID	Enter a requisition ID to limit your search to one requisition.
Requisition Name	Select the name of a specific requisition that you want to view or maintain. This is the name the requester assigned to the requisition. If a name was not assigned, the system uses the requisition ID as the name. This limits the search results to one specific requisition.
Supplier Name	Select a supplier to limit your search to the requisitions with this supplier.
Requester	Select a requester ID to limit your selection to requisitions entered by this individual.
Buyer	Select a buyer ID to limit your selection to requisitions with this buyer.

Field or Control	Description
Requisition Type	Select a Requisition Type (Standard, Bill Only, and Bill and Replace) to view the list of requisition of the selected type. To configure Requisition Type, see Setting Up Installation Options for Fluid eProcurement.
Include Lines with No Supplier	Selecting this check box enables the system to display lines that do not have a supplier associated with them. These lines can then be manually updated to include a supplier for sourcing.

Requisition Schedule Lines

Field or Control	Description
Include	Select to include an individual requisition in the planned purchase order. When you initially select a requisition for inclusion in the purchase order, the system activates the Submit and Preview buttons. Deselect the check box to remove the requisition from the planned purchase order later.
Include All/ Exclude All	Select the check box to include all requisitions in the planned purchase order. The requisitions must first have valid suppliers assigned to them. Deselect the check box to remove all requisitions from the planned purchase order.
Supplier Name	Enter the supplier ID of the supplier that you want assigned to each requisition. You can assign suppliers by either selecting a supplier in individual rows or click the Select All/Deselect All check box and the Apply Supplier to Selected Lines button to assign a single supplier to multiple lines.
Select All/Deselect All	Select this check box to select all lines and apply the supplier that appears in the field below when you click the Apply Supplier to Selected Lines button.
Apply Supplier to Selected Lines	Click to apply the supplier ID that appears in the Supplier field at the left of this button to the requisition lines that have been selected using the Select All/Deselect All check box.
PO Qty (purchase order quantity)	The quantity that is ordered from the supplier. This value is from the Requisition Quantity field, but you can change the quantity before you create the purchase order.

Field or Control	Description
Amount Only	Displays if the line is an amount-only line.
 (Go To Attachments)	Select this icon to access the Attachments page where you can view the attachments to this requisition at the line level. See Submitting Requisitions.

Build Purchase Order

Use the Build Purchase Order group box to send all included requisition schedule lines to the staging tables where they are converted into purchase orders.

Field or Control	Description
Default Buyer ID	Select the name of the buyer to use on the PO. This value only applies if another buyer is not found on the staging table or default hierarchy, or if requisitions are consolidated by buyer. These buyers are listed on the User Preferences page.
Build POs as Approved (build purchase orders as approved)	Select to have purchase orders created with an <i>Approved</i> status when you run the Create Purchase Orders process. If selected, the process examines auto approval criteria set at the business unit level. If the auto approval criteria is met, the status is set to <i>Approved</i> . If the auto approval criteria is not met, the status is set to <i>Pending</i> approval, and the purchase order enters the approval process. If you do not select this check box, the purchase order is created with a status of <i>Open</i> .
Submit	Click to create the purchase order for the requisition lines that you have selected using the Include button, which is located at the bottom portion of this page. The Submit feature stages the items and launches the PO Calculations process (PO_POCALC) and Create Purchase Order process (PO_CREATE). You must assign a supplier to the requisition line before the system can create a purchase order. For requisitions containing a negative price item, the above processes do not reprice the requisition line, create partial sourcing, or consolidate with other requisitions onto one purchase order. For more information about negative price items, see the "Using a Negative Price on Special Request Pages" section of the "Using Special Requests and Express Forms to Create Requisitions" chapter. See Understanding Special Requests and Express Forms.

Field or Control	Description
Preview	Click to display a preview of the purchase order before it is actually staged. You must select the requisition, click the Include button in the lower portion of this page, before you can preview.

Related Links

[Setting Up Installation Options](#)

[Setting Up Attachments for Transactions](#)

Staged Purchase Order Page

Use the Staged Purchase Order page (PV_PO_REQ_CREATE) to review and change the staged PO.

Navigation:

Click the **Preview** button on the Expedite Requisitions page.

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

Staged Purchase Orders Find | View All First 1 of 1 Last

Unit US001 Supplier Name BIKE-001

Lines / Schedules Find | View All First 1 of 1 Last

Line 1

Item ID 10000

Price 20.00000

Req Qty 6.0000 EA

Merchandise Amount 120.00 USD

Schedule 1

Due Date

Freight Terms DES

Ship Via COMMON

Ship To US001

*Distribute By Quantity

Distribution Details Personalize | Find | View All First 1 of 1 Last

Chartfields More Details

Distribution Line	PO Qty	Merchandise Amt	Percent	Location	Entry Event	*GL Unit	*Account
1	6.0000	120.00	100.0000	US001	PO_COMB	US005	131000

[Return to Expedite Requisitions](#)

Field or Control	Description
Distribute by	To split this shipment schedule line into multiple distribution lines, select <i>Quantity</i> or <i>Amount</i> as the method of splitting.

Distribution Detail

Field or Control	Description
PO Qty (purchase order quantity)	The quantity of the distribution line.
Amount	The extended price of the distribution line (unit price × quantity).
Percent	The percentage of quantity or amount on this distribution line.
Location	The internal shipping location.

Related Links

“Defining and Using ChartField Value Sets” (Application Fundamentals)

Using the Quick Sourcer

This section provides an overview of the Quick Sourcer and discusses how to enter parameters for the AutoSelect Requisitions process and enter parameters for the PO Calculations and Create Purchase Order processes.

Pages Used for the Quick Sourcer

Page Name	Definition Name	Usage
Selection Criteria Page	PV_RUN_REQSORC_1	Enter parameters for the AutoSelect Requisitions process.
Sourcing Options Page	PV_RUN_REQSORC_2	Enter parameters for the PO Calculations process and the Create PO process.
Run Results Page	RUN_PO_AUTOSRC_LOG	Check the results. Navigate to the Run Results tab or use the Process Monitor.

Understanding the Quick Sourcer

The Quick Sourcer process creates orders from requisitions by creating a material stock request in an organization's inventory stock or creating a purchase order to send to the supplier.

The Quick Sourcer process combines these PeopleSoft Purchasing processes:

Term	Definition
AutoSelect Requisitions process (PO_REQSORC)	Applies the priority one supplier to each requisition line.
Build Inventory Demand process (PO_REQINVS)	Checks the organization's inventory stock to see whether the order can be filled internally. This process applies only if PeopleSoft Inventory is installed. If stock is found, the system creates a material stock request in PeopleSoft Inventory, and the requisition is identified as complete. The material stock request ships the required stock to the requester.
PO Calculations process (PO_POCALC)	Verifies that the requisition has been completely filled from inventory stock. If it has not, the process passes the remaining quantity that is needed to the Create Purchase Order process.
Create Purchase Order process (PO_CREATE)	Creates a purchase order for requisition quantities that were not filled by the Build Inventory process. You can set up the system, so that if there is not enough inventory stock, a material stock request is issued for part of the order, and a purchase order is created for the remaining quantity.

Using the Quick Sourcer with Negative Price Items

For requisitions containing a negative price item, the above processes:

- Do not source to PeopleSoft Inventory, PeopleSoft Strategic Sourcing, or a request for quote (RFQ). You can only source to a purchase order.
- Do not partially source the requisition line.
- Do not reprice to match the system price. ($CALC\_PRICE\_FLG = N$)
- Do not consolidated with other requisitions. ($CONSOLIDATE\_FLG = N$)
- Do not apply contract pricing.
- Do not use the price tolerance fields. (Tolerance/Tolerance Under, % Unit Price Tolerance, and Unit Price Tolerance)

For more information about negative price items, see the "Using a Negative Price on Special Request Pages" section of the "Using Special Requests and Express Forms to Create Requisitions" chapter.

See [Understanding Special Requests and Express Forms](#).

Using the Quick Sourcer with Procurement Contract Functionality

The PeopleSoft eProcurement, PeopleSoft Purchasing, and PeopleSoft Payables applications are integrated with the procurement contract functionality to streamline the use of contacts with requisitions, purchase orders, and vouchers. As part of the contract functionality:

- The system can automatically apply default contract information into a requisition line or you can manually add contract information. Applying contract prices to requisitions enables you to receive

contract prices for requisition items and to more accurately track budgets and pre-encumbrance balances.

- The system can automatically search for a contract or verifies the existing contract when sourcing a requisition to a purchase order. When sourcing requisitions in batch or processing online purchase orders, the system evaluates system settings to determine whether to check for prices and use a contract on the purchase order.

See “Understanding How to Apply Procurement Contract Prices to Transactions” (PeopleSoft Purchasing).

See “Understanding Voucher and Order Contracts” (PeopleSoft Source to Settle Common Information).

Correcting Errors After the Quick Source Process

When a requisition line is processed by Quick Source, missing or incorrect information can cause the line to be set to the stage status of *Error*. Once the information on the requisition line is corrected and the stage status is set to *Recycled*, then the line can be reprocessed using just the PO Calculation process. For more information about error correction, see “Using the Sourcing Workbench” (PeopleSoft Purchasing).

It is important to understand that essential information related to the PeopleSoft eProcurement application resides in companion documentation, especially the *PeopleSoft Purchasing* documentation, which you should be familiar with.

See “Using the Sourcing Workbench” (PeopleSoft Purchasing).

Selection Criteria Page

Use the Selection Criteria page (PV_RUN_REQSORC_1) to enter parameters for the AutoSelect Requisitions process.

Navigation:

eProcurement > Buyer Center > Quick Source Requisitions > Selection Criteria

This example illustrates the fields and controls on the Selection Criteria page of the Quick Source Requisitions component. You can find definitions for the fields and controls later on this page.

Quick Source Requisitions

[SelectionCriteria](#)
[Sourcing Options](#)
[Run Results](#)

Run Control ID 1
[Report Manager](#)
[Process Monitor](#)

Run

Run Control Parameters

Use the fields on the first two tabs to define a run control process for building purchase orders from requisitions, then click Run to schedule the process. You may check the results by navigating to the Run Results tab or by using the Process Monitor.

Selection Criteria

Use the following fields to select which requisitions will be included in your purchase orders.

*Request Type

Both Inventory Demand and PO's

☒ Item ID Required

From Business Unit
To Business Unit

From Requisition ID
To Requisition ID

Requisition Name
Priority

Requester

Buyer

Supplier SetID
Supplier ID

Contract SetID
Contract ID

Category SetID
Category

Work Order ID
Origin

Line Type Option

☒ All Items
☐ Catalog Items
☐ Direct Connect Items
☐ Special Request Items

Date Selection

Select one of the following methods for choosing dates to be used in requisition selection.

☒ No Selection by Date

☐ Current Date

Operand

Nbr Days

Date

☐ Current Date Minus Days

☐ Current Date Plus Days

☐ Specified Date

Field or Control	Description
Request Type	Select the type of requisition. Values are: <i>Inventory Demand:</i> Processes only the requisition lines for which the Inventory Source check box is selected. Note: You can select the Inventory Source check box on the Items Definition page. <i>Purchase Orders:</i> Processes only the requisition lines for which the Inventory Source check box is not selected. <i>Both Inventory Demand and PO's:</i> Processes both types of requisitions.
Item ID Required	Select to process the requisitions that have a valid item ID that is set for AutoSelect. Define an item for AutoSelect on the Purchasing Attributes - Purchasing Controls page. If this check box is deselected, the Quick Sourcing processes special requests. If the special request does not include a supplier ID, then the requisition line appears with an error status in the purchase order staging tables. If this check box is selected, then all special requests are processed manually using the Requisition Expediter page.
From Business Unit	If you are opting to source by a range of business units, you can elect to put a starting value in the From Business Unit field and an ending value in the To Business Unit field.
From Requisition ID	If you are opting to source by a range of requisitions, you can elect to put a starting value in the From Requisition ID field and an ending value in the To Requisition ID field.
Priority	Select the priority for the purchase order. Values include <i>Rush</i>, <i>High</i>, <i>Medium</i>, and <i>Low</i>. If blank priority is selected, the Rush and Non-Rush (high, medium, and low) requisitions will not be consolidated together even if they match the consolidation criteria on the Sourcing Options tab. Rush requisitions will create a Rush Purchase Order (PO), while non-Rush requisitions will combine to create a medium-priority PO. If requisitions do not match the consolidation criteria, rush, high, medium, and low priorities will create separate POs.
Requisition Name	Select the name of a specific requisition. This is the name the requester assigned to the requisition. If a name was not assigned, the system uses the requisition ID as the name. This limits the search results to one specific requisition.
Requester	Specify the requester for whom you want to source requisitions.

Field or Control	Description
Buyer	Select a specific buyer for whom to source requisitions to create purchase orders.
Supplier SetID	Specify the specific supplier SetID for the system to narrow its search.
Supplier ID	Specify the specific supplier ID for the system to narrow its search.
Contract SetID	If you are sourcing requisitions associated to contracts, you can specify the specific contract SetID for the system to narrow its search.
Contract ID	If you are sourcing requisitions associated to contracts, you can specify the specific contract ID for the system to narrow its search.
Category SetID	Specify the specific category set ID for the system to narrow its search.
Category	Specify the specific category for the system to narrow its search.
Work Order ID	Select a work order that is associated with sourcing the requisition.
Origin	Select the origin for the purchase order. Origin codes are established on the Origin Codes page and help identify the origins of transactions.
Line Type Option	Select one option to filter sourcing by the line type. The line type options given are: • All Items. • Catalog Items. • Direct Connect Items. • Special Request Items.

Date Selection

Field or Control	Description
Option	Specify date selection criteria to select the requisition lines with source dates that are within the specified date criteria, as related to the current system date. Values are: No Selection by Date. Current Date. Current Date Minus Days. Current Date Plus Days. Specified Date.
Operand	Restricts the range to before, equal to, or after the date in the Date field. For example, to select requisitions for sourcing that have source dates for the next three days, select <i>P</i> in the Option field, <i><=</i> in the Operand field, and 3 in the Nbr Days (number of days) field.
Nbr Days (number of days)	The number of days for the before, equal to, and after selection in the Operand field.
Date	Specify the date to use in the date selection criteria. This field is required when you select <i>S</i> in the Option field.

Related Links

“Automatically Selecting Requisitions for Sourcing” (PeopleSoft Purchasing)

Sourcing Options Page

Use the Sourcing Options page (PV_RUN_REQSORC_2) to enter parameters for the PO Calculations process and the Create PO process.

Navigation:

eProcurement > Buyer Center > Quick Source Requisitions

Click the Sourcing Options tab.

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

SelectionCriteria

Sourcing Options

Run Results

Run Control ID QSourcer

Report Manager Process Monitor

Run

Run Control Parameters

Use the fields on the first two tabs to define a run control process for building purchase orders from requisitions, then click Run to schedule the process. You may check the results by navigating to the Run Results tab or by using the Process Monitor.

Sourcing Options

Use the following fields to define how your purchase orders will be created. The Buyer below is used on the purchase order only if another one is not found on the staging tables or default hierarchy, or if transactions are consolidated by buyer.

*Buyer

VP1

*Consolidation Method

Business Unit, Supplier

Origin

ONL

Online Entry

Purchase Order Date

Purchase Order Reference

☒ Pre-Approve Supplier

☒ Build POs as Approved

☐ Expedite Staged POs

☐ Calculate PO Line Numbers

☐ Hold From Further Processing

☐ Budget Check

☐ Document Tolerance

☒ Allow Dispatch When Approved

☐ PO Dispatch

Flexible Sourcing Controls

Lead Time Factor %

Ship to Priority Factor %

Price Factor %

Supplier Priority Factor %

Field or Control	Description
Buyer	Select the buyer to use on the purchase order header in case the PO Calculations process cannot determine the buyer. The buyer name is carried at the line level on the requisition, so a requisition can have multiple buyers. When the PO Calculations process creates the purchase order header, it must assign a buyer name. If all the staged lines that belong on one purchase order have the same buyer name, the PO Calculations process uses that name on the header. However, if the staged lines that belong on the purchase order have different buyer names, and the process that created the staged entry did not specify a name, the name that you enter here is used on the purchase order header.

Field or Control	Description
Consolidation Method	Determines whether purchase orders are consolidated by business unit, supplier, and buyer, or by business unit and supplier only. The consolidation method applies only to staged rows that are identified for consolidation. For example, suppose that you choose to consolidate by business unit and supplier only, then all the rows that belong to the same supplier in each business unit are grouped into one purchase order, even if they have different buyers. Alternately, if you add a buyer to the criteria, purchase orders are built in the same manner. However, they are split between buyers, so that each buyer has a separate purchase order with this configuration.
Lead Time Factor %, Ship to Priority Factor %, Price Factor %, and Supplier Priority Factor % (percentage)supplier priority factor	These fields are used for flexible sourcing. To override the category and item settings, enter the percentage weight that you want the PO Calculations process to give the factor when the application process evaluates suppliers for flexible sourcing. The sum of these factors must be 100 percent.
Origin	Enter an origin to be used on the purchase order.
Purchase Order Date	Enter a date for the purchase order, if a date has not been assigned. If you leave this field blank, the PO Calculations process uses the current system date.
Purchase Order Reference	Enter a purchase order reference for the purchase orders. This is a free-form field.
Pre-Approve Supplier	Select to approve the supplier automatically that the PO Calculations process selects. This option enables you to run the PO Calculations process and the Create Purchase Order process as a unit, without having to approve the suppliers.
Build POs as Approved	Select so that the purchase orders that are created when you run the Create Purchase Order process have an <i>Approved</i> status. If you select this option, the process examines auto-approval criteria set at the business unit level.
Expedite Staged POs	Select to source all requisitions that are located in the staging table.
Calculate PO Line Numbers	Select to ignore staged entry line numbers when the Create Purchase Order process creates new purchase orders and assigns sequential line numbers, beginning with 1. If you do not select this option, the performance is faster, but you might have purchase orders with nonsequential line numbers that do not begin with 1.

Field or Control	Description
Hold from Further Processing	Select to place the resultant purchase orders on hold and prevent further processing.
Budget Check	Select to run the budget checking process on the resultant purchase orders.
Document Tolerance	Select to run the document tolerance checking process on the resultant purchase orders. Note: This option is available when you select the Enable Document Tolerance check box on the Installation Options - Overall page.
Allow Dispatch When Appr (approved)	Select to make the resultant purchase orders eligible for dispatch.
PO Dispatch (purchase order dispatch)	Select to run the purchase order dispatch process on the resultant purchase orders. This option is only available when the Allow Dispatch When Approved check box is selected.

Note: Users can view the results either by navigating to the Run Results page or by using the Process Monitor **PeopleTools** > **Process Schedule** > **Process Monitor**.

Related Links

“Understanding the Purchase Order Sourcing Business Process” (PeopleSoft Purchasing)

Run Results Page

Use the Run Results page (RUN_PO_AUTOSRC_LOG) to check the results. Navigate to the Run Results tab or use the Process Monitor.

Navigation:

eProcurement > **Buyer Center** > **Quick Source Requisitions**

Click the Run Results tab.

Dispatching Purchase Orders

With PeopleSoft eProcurement, you can dispatch purchase orders individually or in volume, dispatch from the Online Dispatcher page or using a batch process, and dispatch purchase orders using any dispatch method: print, fax, phone, email, or electronic data exchange (EDX). The EDX dispatch method can be used with or without a linked supplier.

The purchase order format determines the layout of the purchase order when it is printed, faxed, attached to an email, or electronically transmitted using EDX. To format the purchase order, you can choose between Oracle BI Publisher and SQR Reports.

For more information, see [Understanding Purchase Order Dispatch](#)

Page Used to Dispatch Purchase Orders

Page Name	Definition Name	Usage
Dispatching Purchase Orders Page	PV_PO_MAIN2	Select from a range of tasks for sending purchase orders to suppliers.

PeopleTools: BI Publisher for PeopleSoft

Related Links

[Understanding Purchase Order Dispatch](#)

Running Procurement Processes

This section discusses how to run the procurement processes.

Page Used to Run Procurement Processes

Page Name	Definition Name	Usage
Procurement Processes Page	PV_PO_MAIN3	Perform buyer tasks relating to Purchase Orders.

Procurement Processes Page

Use the Procurement Processes page (PV_PO_MAIN3) to perform buyer tasks relating to Purchase Orders.

Navigation:

eProcurement > Buyer Center > Procurement Processes

This example illustrates the fields and controls on the Procurement Processes page.

Procurement Processes
<u>Requisition Selection</u> Select requisitions for purchase order sourcing.
<u>PO Auto Sourcer</u> Request process to automatically source purchase orders.
<u>Auto Requisition Selection</u> Request process to create purchase orders from requisitions.
<u>Inventory Demand</u> Run inventory demand.
<u>PO Calculations</u> Run purchase order calculations.
<u>PO Create</u> Create purchase orders.
<u>Dispatch Purchase Orders</u> Dispatch purchase orders via Email, Fax, Print, EDX, etc.
<u>Change Purchase Order</u> Run the batch change purchase order process.
<u>Notify Suppliers of Attachments</u> Notify Suppliers of attachments for purchase orders
<u>Sourcing Workbench</u> Analyze the sourcing staging tables.
<u>Requisition Budget Checking</u> Run Requisition Budget Checking
<u>Requisition Reconciliation</u> Close requisitions that have been canceled or sourced, either from inventory or through a purchase order
<u>Requester's Workbench</u> Requester's Workbench
<u>PO Budget Check Request</u> PO Budget Check Request
<u>Reconcile Purchase Orders</u> Run the reconcile PO process.
<u>Buyer's Workbench</u> Buyer's Workbench
<u>Purge Change Requests</u> Purge the completed change requests.
<u>Purge Stage Tables</u> Purge the stage tables based on your selection criteria.
<u>Process Monitor</u> View the process monitor.

Using the **Procurement Processes** link in the Buyer Center, you can perform buyer tasks relating to purchase orders. To access the Procurement Processes page, select **eProcurement > Buyer Center > Procurement Processes**. Tasks include:

- **Requisition Selection:** Select requisitions for purchase order sourcing.
- **PO Auto Sourcer** (purchase order automatic sourcer): Run the Automatic Purchasing Sourcing process, which enables you to select multiple sourcing processes that you want to run and runs the selected processes in the correct sequence on the same set of records.

- **Auto Requisition Selection:** Run the AutoSelect Requisitions process to load eligible approved requisitions into the PeopleSoft Purchasing stage tables for purchase order creation and is an alternative to selecting requisitions online using the Requisition Selection - Sourcing page.
- **Inventory Demand:** Runs the Build Inventory Demand process, which reserves all rows in the staging tables that are identified for inventory demand (**Inventory Source** option set to *Y* (yes)), have a stage status of *S* (staged), and meet the user-defined selection criteria.
- **PO Calculation** (purchase order calculation): Run the PO Calculations process, which performs most of the processing necessary to create a purchase order. After running the process, you can review results and make changes using the Sourcing Workbench - Selected Items page before the purchase order is created. After you run the PO Calculations process, run the Create Purchase Orders process to create the purchase order.
- **PO Create:** Run the Create Purchase Orders process to create purchase orders using rows in the staging tables that have been processed by the PO Calculations process. The Create Purchase Orders process maintains the purchase order groupings created by the PO Calculations process to create purchase orders. The Create Purchase Orders process calculates the purchase order ID, assigns line, schedule, and distribution numbers, and creates contract release information.
- **Dispatch Purchase Orders:** Run the PO Dispatch/Print process and dispatch purchase orders, run the Email process, or run the PO Dispatch & Email multiprocess job.
- **Change Purchase Order:** Select parameters for and run the Change Purchase Order process.
- **Notify Suppliers of Attachments:** Indicate that you have attached a file to a PeopleSoft eProcurement requisition. The file can be, for example, a Microsoft Word file, an Excel spreadsheet, a Microsoft PowerPoint presentation, or a Microsoft Visio diagram. The requester and buyer can view these attachments. The attachment is automatically added to the purchase order that is created from the requisition and can be sent to the supplier.
- **Sourcing Workbench:** Access the Sourcing Workbench component, where you can view the results of each sourcing step. Using the workbench you view staged rows, along with any errors accompanying them. You can also use the workbench to transfer from the staged row to the source transaction data, change the status of the source record, correct the source, and recycle the staged row for reprocessing.
- **Requisition Budget Checking:** Access the Requisition Budget Checking component to run Requisition Budget Checking.
- **Requisition Reconciliation:** Run the Requisition Reconciliation process to close requisitions that are fully canceled or fully sourced and no longer need to be modified. When the process runs, it reconciles requisition-related settings and statuses to change the status of applicable requisitions to *C* (completed).
- **Requester's Workbench:** Access the Requester's Workbench where you can retrieve, review and modify multiple requisitions using functions such as update a requisition or maintaining distributions on a requisition. You can also approve, budget check, or cancel requisitions.
- **PO Budget Check Request:** Access the PO Budget Check Request where you can check the budget for the purchase order.
- **Reconcile Purchase Orders:** Run the PO RECON process (PO_PORECON) to close qualifying purchase orders that you no longer need to modify. When the PO RECON process runs, it reconciles

various purchase order-related settings and statuses to change the status applicable purchase orders to *C* (completed).

- **Buyer's Workbench:** Access the Buyer's Workbench where you can retrieve, review, and modify multiple purchase orders. You can also approve, budget check, or cancel purchase orders.
- **Purge Change Requests:** Access the Purge Change Requests process page where you can launch the PO_POCHGPRG process to purge completed and error rows from the Change Request tables in PeopleSoft Purchasing.
- **Purge Stage Tables:** Access the Purge Stage Tables process page where you can launch the PO_POSTGPRG process to purge entries on the PeopleSoft Purchasing staging tables.
- **Process Monitor:** Monitor the process and status of requisition and purchase order processes.

Related Links

“Understanding the Purchase Order Business Process” (PeopleSoft Purchasing)

Accessing Supplier Tables, Item Tables, and Return to Supplier

This section lists the pages used to access supplier tables, item tables, and returns to suppliers.

Pages Used to Access Supplier Tables, Item Tables, and Returns to Vendors

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Suppliers Page	none	Access supplier tables.
Maintain Items Page	PV_ADM_DEFINE_ITEM	Access PeopleSoft item tables.
Return to Vendors Page	none	Access the return to vendor pages.

Accessing Inquiries and Reports

This section discusses how to access inquiry pages and reports.

Page Used to Access Inquiries and Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Inquiries and Reports Page</u>	PV_RPT_MAIN	Access inquiry pages and reports for requisitions, purchase orders, and items.

Inquiries and Reports Page

Use the Inquiries and Reports page (PV_RPT_MAIN) to access inquiry pages and reports for requisitions, purchase orders, and items.

Navigation:

eProcurement > Buyer Center > Inquiries and Reports

This example illustrates the fields and controls on the Inquiries and Reports page (partial page).

Inquiries

PO Inquiry
Inquire on purchase order details.

PO Activity Summary
Inquire on purchase order activities.

PO Change History
Inquire on purchase order change history.

Procurement Group Inquiry
Procurement Group Inquiry.

Reports

Expediting Report
Provides purchase order details such as late days and due date sorted by buyer, supplier, or due dates.

PO Listing Report
Provides purchase order information sorted by purchase order date, supplier, buyer, or status.

PO Status Listings
Provides purchase order status information sorted by supplier or item.

PO Detail Listings
Provides detailed purchase order information sorted by purchase order date, supplier, or buyer.

PO Schedule Listings
Provides purchase order schedule information such as ship to and due date sorted by purchase order date, supplier, or buyer.

PO To Requisition Xref
Provides a cross reference between requisitions and the purchase orders created from those requisitions.

Related Links

[PeopleSoft eProcurement Reports: General Description](#)

Generating and Viewing PeopleSoft eProcurement Information

This section discusses how to generate and view PeopleSoft eProcurement information.

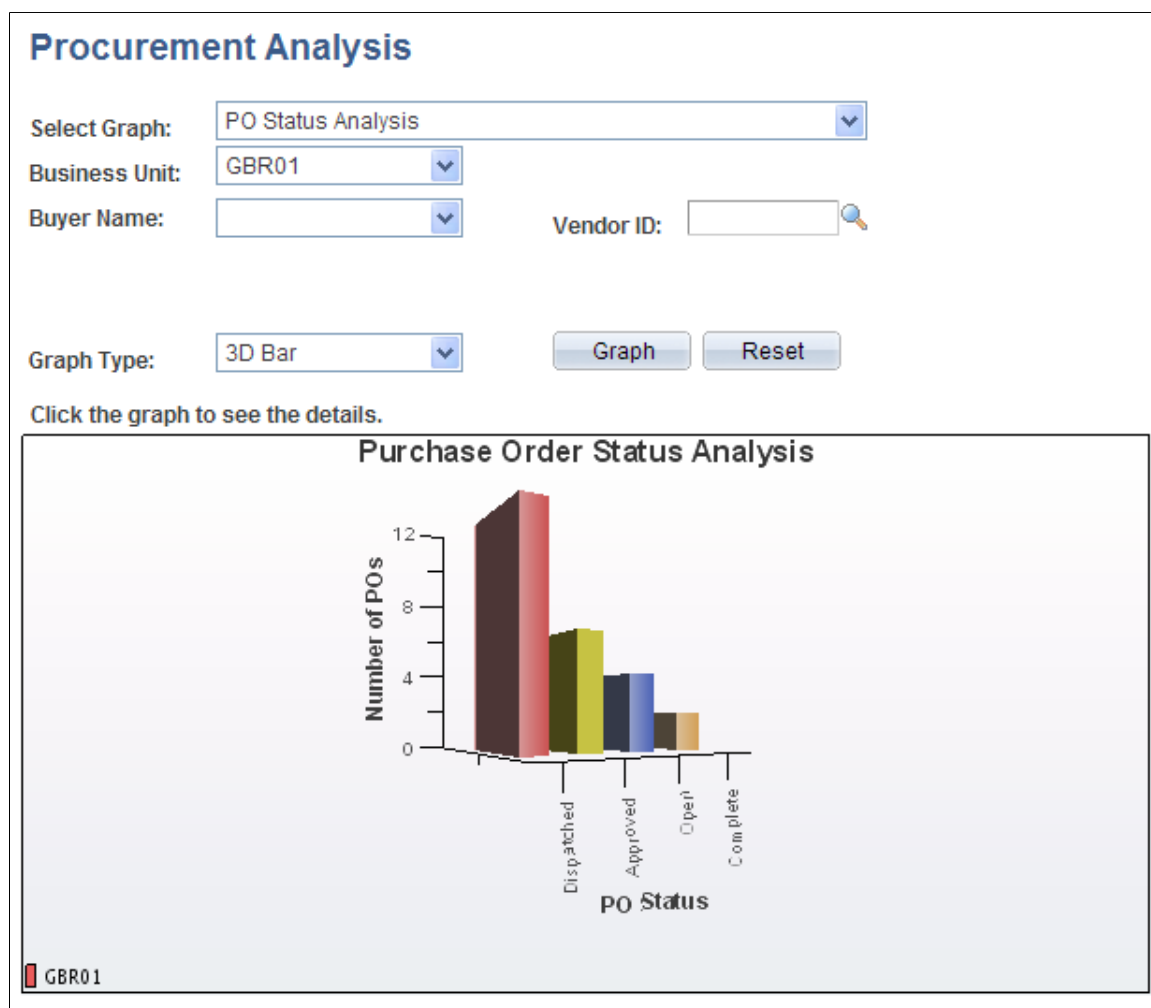
In addition to the standard reports and inquiries that PeopleSoft applications provide, PeopleSoft eProcurement provides transactional analysis graphs. These graphs can be displayed as bar graphs, pie charts, line graphs, or histograms. These graphs enable you to view information about PeopleSoft eProcurement requisition and purchase order transactions. Four graphs are delivered with PeopleSoft eProcurement:

<i>Field or Control</i>	<i>Description</i>
PO Status Analysis	Provides information about the current state of purchase orders by displaying the number of purchase orders in each purchase order status.
PO Value Analysis	Provides information about the total purchase order costs by item category or ship-to location.
Requisition Status Analysis	Provides information about the current state of the requisitions by displaying the number of requisitions in each requisition status.
Supplier Analysis by Categories	Provides information about total quantities and amounts received from suppliers.

PO Status Analysis Graph

This graph displays the number of purchase orders that are currently in each purchase order status. The graph displays information for only one PeopleSoft Purchasing business unit at a time. Within the business unit, you can further limit the purchase orders that appear to one supplier and one buyer.

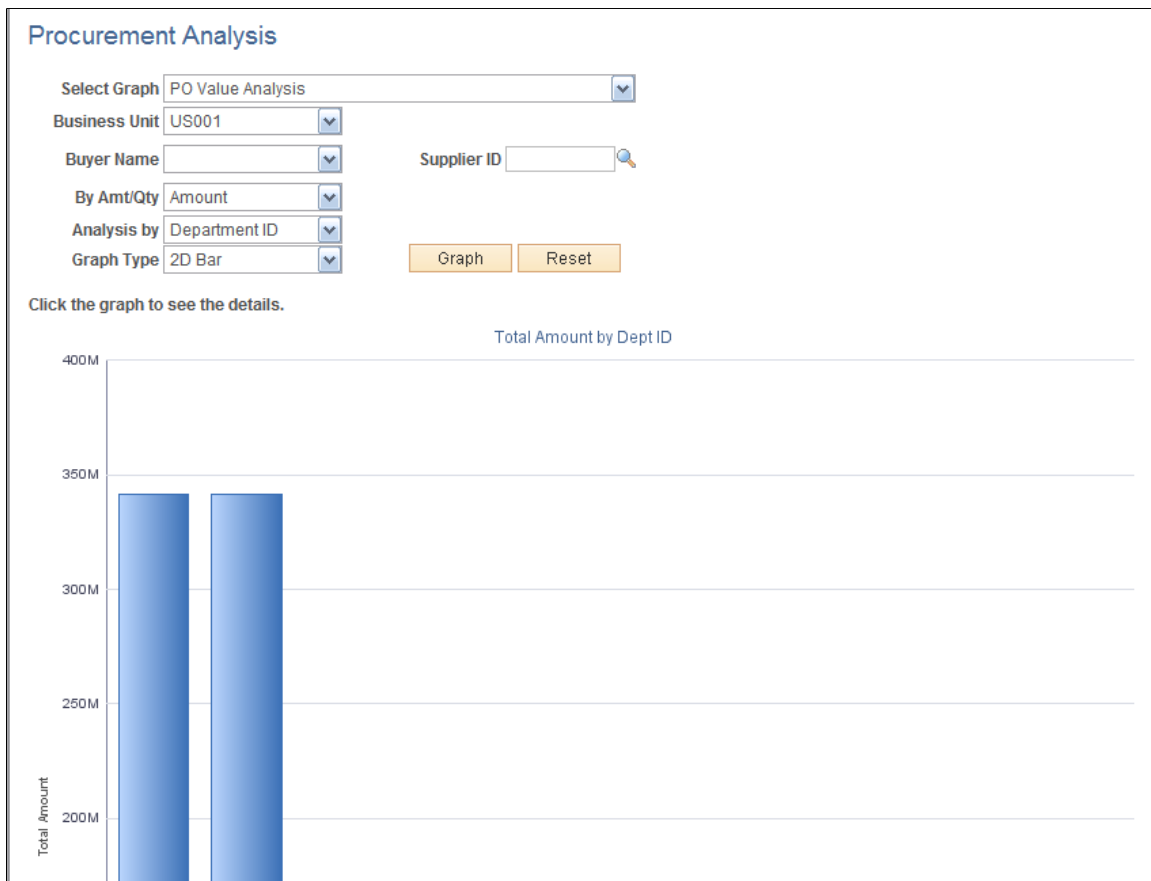
This example illustrates the fields and controls on the PO Status Analysis three-dimensional bar graph generated in PeopleSoft eProcurement.



PO Value Analysis Graph

This graph displays the total monetary amount of the purchase orders. This information can be processed by item category (using the purchase order line level), Ship To code, Location code, or Department ID (using the purchase order distribution line level). The method is noted at the top of the graph. The graph displays information for only one PeopleSoft Purchasing business unit at a time. Within the business unit, you can further limit the purchase orders that appear to one supplier and one buyer.

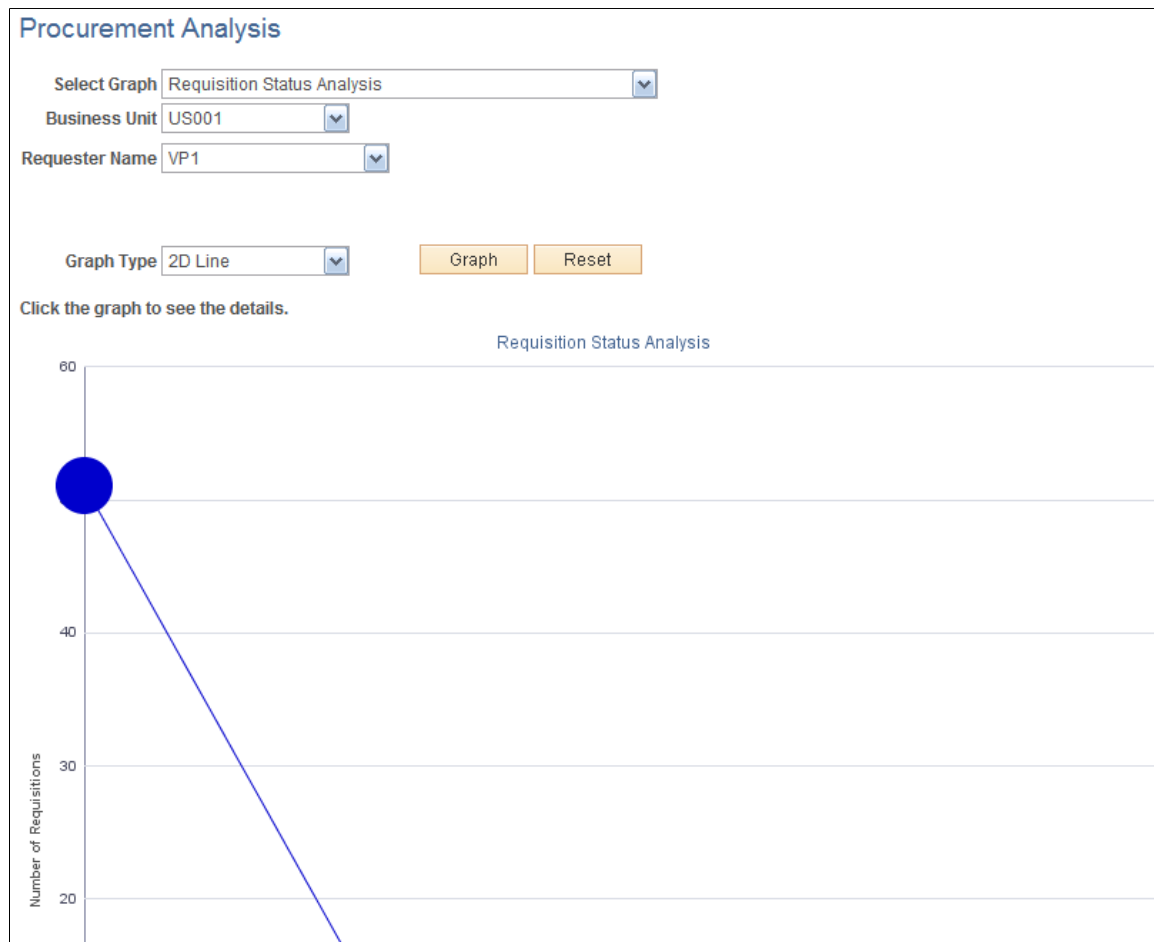
This example illustrates the fields and controls on the PO Value Analysis two-dimensional bar graph generated in PeopleSoft eProcurement.



Requisition Status Analysis Graph

This graph displays the number of requisitions that are currently in each requisition status. The graph displays information for only one PeopleSoft Purchasing business unit at a time. Within the business unit, you can further limit the requisitions that appear to one requester.

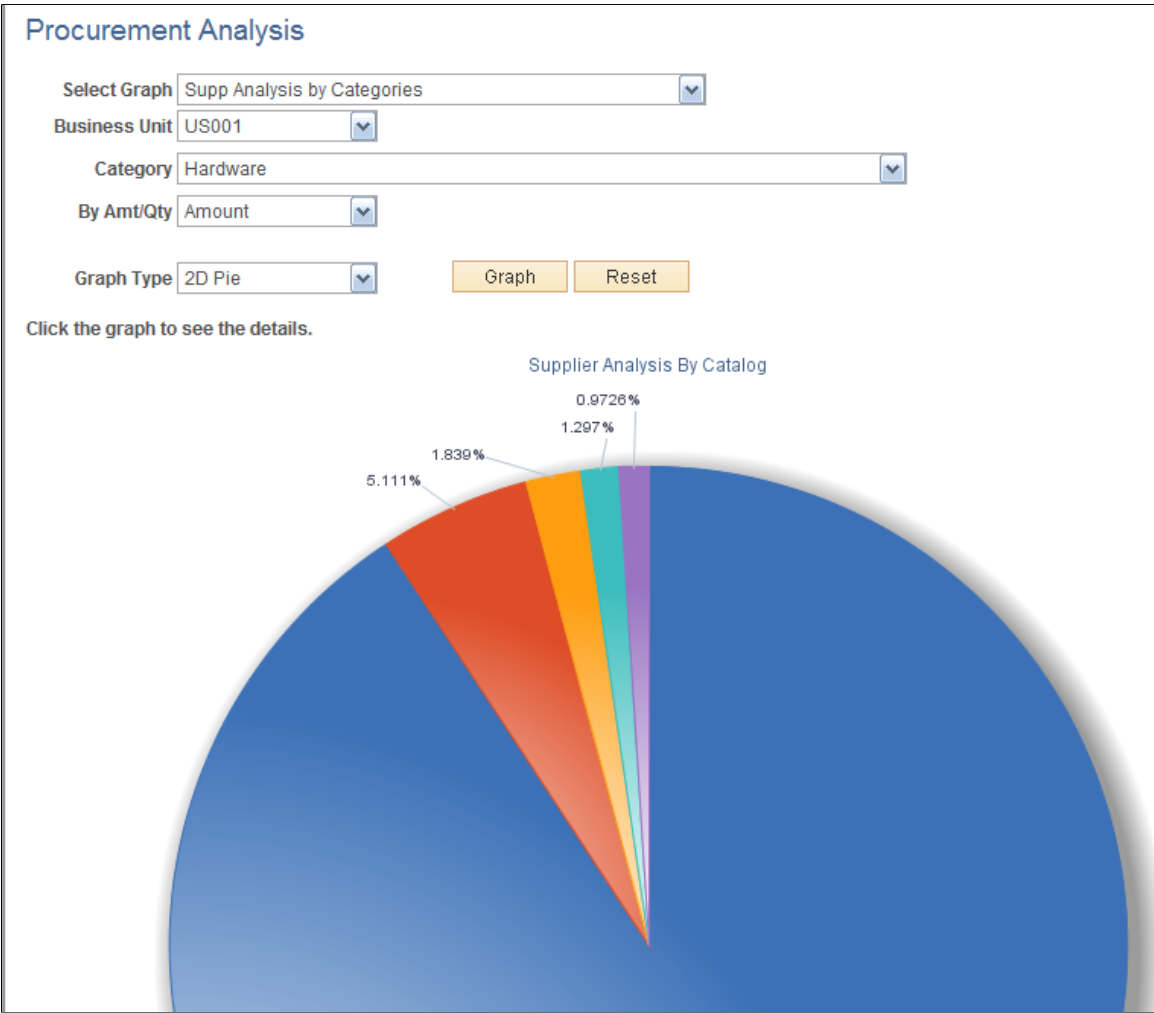
This example illustrates the fields and controls on the Requisition Status Analysis line graph generated in PeopleSoft eProcurement.



Supplier Analysis by Categories Graph

This graph displays the quantity or amount of goods that a supplier supplies to a business unit for a specific category using the Supplier Analysis by Categories graph. The system totals the monetary value to arrive at an amount value from each supplier or it totals the number of units to arrive at a quantity from each supplier.

This example illustrates the fields and controls on the Supplier Analysis by Categories two-dimensional pie chart generated by PeopleSoft eProcurement.



Page Used to Generate and View PeopleSoft eProcurement Information

Page Name	Definition Name	Usage
<u>Procurement Analysis Page</u>	PV_GRAPH_MAIN	Generate and view PeopleSoft eProcurement information in transactional analysis graphs using requisition and purchase order information.

Procurement Analysis Page

Use the Procurement Analysis page (PV_GRAPH_MAIN) to generate and view PeopleSoft eProcurement information in transactional analysis graphs using requisition and purchase order information.

Navigation:

eProcurement > Buyer Center > Analyze Procurement Data

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

The screenshot shows the 'Procurement Analysis' page with the following controls:

- Select Graph:** A dropdown menu currently showing 'PO Value Analysis'.
- Business Unit:** A dropdown menu currently showing 'US001'.
- Buyer Name:** A dropdown menu.
- Supplier ID:** A text input field with a magnifying glass icon.
- By Amt/Qty:** A dropdown menu currently showing 'Amount'.
- Analysis by:** A dropdown menu currently showing 'Item Category'.
- Graph Type:** A dropdown menu currently showing '2D Bar'.
- Buttons:** 'Graph' and 'Reset' buttons.
- Instruction:** 'Enter search criteria and click Graph'.

Field or Control	Description
Select Graph	Select one of the four delivered graphs.
Business Unit	The PeopleSoft Purchasing business unit containing the requisitions or purchase orders that are used to build the graph. The system uses the business unit that is specified on the User Preferences - Overall Preferences page as the default.
Supplier ID	Select a supplier ID to restrict the graph information to one supplier. This field does not appear if you selected the Req. Status Analysis graph option.
Buyer Name	Select a buyer name to restrict the graph information to one buyer. The buyers are those that are authorized for the user ID on the User Preferences - Procurement Page: Purchase Order Authorizations page. This field does not appear if you selected the Req. Status Analysis option.
By Amt/Qty (by amount or quantity)	Determine if you want the graph to sort by amount or quantity.
Analysis By	Select how you wish to sort the analysis. • <i>Department ID</i> • <i>Item Category</i> • <i>Location</i> • <i>Ship To</i>
Graph Type	Select the type of graph used to display the results.

<i>Field or Control</i>	<i>Description</i>
Graph	Click to generate the transactional analysis graph.
Reset	Click to delete the entries on this page. Then you can enter new criteria for generating the next graph.

Related Links

[Procurement Page](#)

Dispatching Purchase Orders in PeopleSoft eProcurement

Understanding Purchase Order Dispatch

With PeopleSoft eProcurement, you can dispatch purchase orders individually or in volume. You can dispatch from the online page or through a batch process. A purchase order must have a status of *Approved* and have passed the commitment control budget check to be eligible for dispatch.

You can dispatch purchase orders in PeopleSoft eProcurement using any of the following dispatch methods: print, fax, phone, email, or electronic data exchange (EDX). The EDX dispatch method can be used with or without a linked supplier.

The purchase order format determines the layout of the purchase order when it is printed, faxed, attached to an email, or electronically transmitted using EDX. To format the purchase order, you can choose between:

- *Oracle BI Publisher*: The BI Publisher gives you the flexibility of changing the purchase order formats by choosing different report template IDs for different types of purchase orders. The template ID for dispatched purchase order can be defined at the system-level, business unit level, or on the run control for the dispatch process. To use the BI Publisher for purchase orders in both PeopleSoft eProcurement and PeopleSoft Purchasing, select the Enable BI Publisher check box on the Purchasing page of the Installation Options component.

See *PeopleTools: BI Publisher for PeopleSoft*

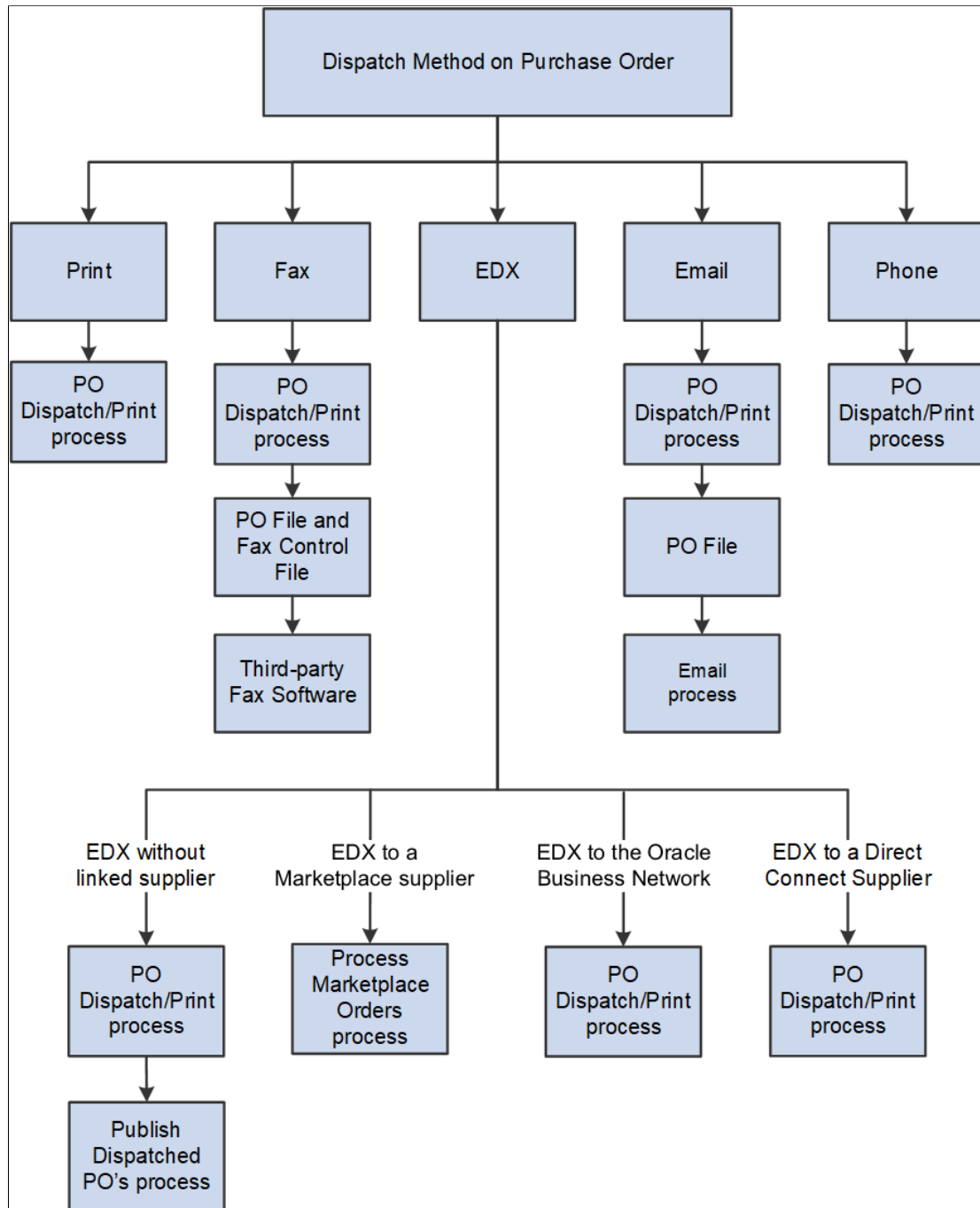
- *SQR Report*: The SQR programming language is the default method used to format purchase orders. To use SQR report for purchase orders in both PeopleSoft eProcurement and PeopleSoft Purchasing, deselect the Enable XML Publisher check box on the Purchasing page of the Installation Options component.

Dispatch Methods Within PeopleSoft eProcurement

Both PeopleSoft eProcurement and PeopleSoft Purchasing provide several different dispatch methods depending on your business needs. The dispatch method for purchase orders uses a default from the Purchasing Options - Purchasing Processing Options page or the Supplier Information - Procurement Options page. You can change the dispatch method on the purchase order manually.

The following diagram illustrates the dispatch methods for PeopleSoft eProcurement, including print, fax, electronic data exchange (EDX), email, and phone.

This diagram illustrates the dispatch methods for PeopleSoft eProcurement.



The dispatch methods available in PeopleSoft eProcurement are:

Term	Definition
Print	A purchase order with the dispatch method of <i>Print</i> uses the dispatch process to print the purchase order and set the purchase order status to <i>Dispatched</i> . You can choose to format the printed purchase order using the SQR report (default) or BI Publisher.

Term	Definition
Fax	A purchase order with the dispatch method of <i>Fax</i> uses the dispatch process to set the purchase order status to <i>Dispatched</i> and create two files; a purchase order file and a fax control file. These files are created in the location that you specify on the File Locations page (Set Up Financials/Supply Chain, Common Definitions, File Locations and Images, File Locations). In addition, the fax dispatch method requires a third-party fax software to handle the output files. A purchase order cannot be dispatched using fax if the fax number is not available on the purchase order or the supplier profile. Please check the log file for those purchase orders that are not dispatched. For more information about dispatching by fax, see “Preparing to Dispatch by Fax and Email” (PeopleSoft Source to Settle Common Information).
Email	A purchase order with the dispatch method of <i>Email</i> uses the dispatch process to set the purchase order status to <i>Dispatched</i> and to create a purchase order file in the location that you specify on the File Locations page. The Email process (PO_PO_EMAIL) picks up the output file from the specified location and sends out an email message with the purchase order as an attachment. For more information about dispatching by email, see “Preparing to Dispatch by Fax and Email” (PeopleSoft Source to Settle Common Information). The Email process sends the email to the address that you specify in the Email ID field on the Supplier Information - Contacts page. If you do not specify a supplier contact on the purchase order, the Email process sends the email to the address that you specify in the Email ID field on the Supplier Information - Address page. A purchase order cannot be dispatched using email if the email ID is not available on the purchase order or the supplier profile. Please check the log file for those purchase orders that are not dispatched. When a message is sent successfully, it is removed from the email queue table; however, the purchase order output files are not deleted. Note: The email dispatch method is designed to work with a SMTP gateway. The settings for the SMTP gateway must be entered when you set up a PeopleSoft Process Scheduler server.
Phone	A purchase order with the dispatch method of <i>Phone</i> uses the dispatch process to change the purchase order status to <i>Dispatched</i>.

Term	Definition
EDX	A purchase order with the dispatch method of <i>EDX</i> uses the dispatch process to update a series of EC outbound staging tables, including: PS_PO_HDR_OUT_EC, PS_PO_LINE_OUT_EC, and PS_PO_SHIP_OUT_EC. A service operation within the PeopleSoft Integration Broker is required to deliver purchase orders to the recipients through designated channels. The publishing of the outbound data (using a service operation) is sometimes a separate process and sometimes combined with the initial process. There are several ways to dispatch an EDX purchase order depending on the supplier setup and destination of the purchase order. The EDX dispatch methods are explained below.

The EDX dispatch methods available in PeopleSoft eProcurement are:

Term	Definition
EDX without a linked supplier	A purchase order is transmitted to a supplier who is not defined as a linked supplier in PeopleSoft eProcurement by: 1. Using the dispatch process to update a series of EC outbound staging tables. 2. Using the Publisher page (eProcurement, Buyer Center, Dispatch Purchase Orders, Publisher) to initiate the outbound message publish process for purchase orders. The publish process converts the purchase orders in the EC outbound staging tables into an eXtensible Markup Language (XML) message using the PURCHASE_ORDER_DISPATCH service operation and transmits the XML message directly to the supplier.

Term	Definition
EDX to a Marketplace supplier	A Marketplace is an electronic trading community in which buyers and sellers use a common internet portal. When you connect PeopleSoft eProcurement to a Marketplace, you can pass purchase orders from PeopleSoft eProcurement and PeopleSoft Purchasing to a Marketplace where suppliers receive the orders and review them. In order to use this method, the supplier must be set up as a marketplace supplier in PeopleSoft eProcurement, including on the Linked Suppliers page (eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers). For more information on setting up a Marketplace supplier, see Understanding the Integration Between a Marketplace and PeopleSoft eProcurement . Purchase orders are dispatched and transmitted to the Marketplace using the Process Marketplace Orders process (eProcurement, Buyer Center, Dispatch Purchase Orders, Marketplace). The Process Marketplace Orders process (PV_MS_PO_SEL) is an application engine process that dispatches the purchase orders and publishes them to the Marketplace using the PV_ORDER service operation within the PeopleSoft Integration Broker. You must use the xCBL 2.0 format to use this process. See Understanding the Integration Between a Marketplace and PeopleSoft eProcurement.
EDX to the Oracle Business Network	The Oracle Business Network (OBN) is an hosted service offering in which buyers and sellers use a common hub for exchanging and monitoring transactions. The following transactions are used in the integration to OBN; purchase orders, purchase order acknowledgements, change orders, advanced shipping notices, and invoices. When you connect PeopleSoft eProcurement to the Oracle Business Network, you can pass purchase orders from PeopleSoft eProcurement and PeopleSoft Purchasing to OBN, OBN passes the purchase orders to the suppliers who receive the orders and review them. In order to use this method, you must first setup the integration to OBN and define your suppliers as an OBN supplier on the Linked Suppliers page (eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers). For more information on integrating with the Oracle Business Network, see Understanding the Integration Between the Oracle Business Network, PeopleSoft eProcurement, and PeopleSoft eSettlements . Purchase orders are dispatched and transmitted to the Oracle Business Network using the dispatch process to update the EC outbound staging tables. The purchase orders are published to OBN using the PV_ORDER service operation and the ORACLE_SN_ORDER routing within the PeopleSoft Integration Broker. See Understanding the Integration Between the Oracle Business Network, PeopleSoft eProcurement, and PeopleSoft eSettlements.

Term	Definition
EDX to a Direct Connect Supplier	Direct connect enables PeopleSoft purchase orders to be dispatched directly to the supplier's website. If a supplier is defined as a direct connect supplier in PeopleSoft eProcurement, including on the Linked Suppliers page (eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers), the system dispatches purchase orders associated with that supplier and electronically transmits them to the direct connect supplier using the cXML or xCBL formats. For more information on setting up a direct connect supplier, see Understanding Direct Connect Supplier Integration. A direct connect purchase order with the dispatch method of <i>EDX</i>, uses the dispatch process to update the EC outbound staging tables. The dispatch process then publishes the purchase orders to the supplier's website using the PV_ORDER_REQ service operation within the PeopleSoft Integration Broker. See Understanding Direct Connect Supplier Integration.

Using Dynamic Dispatch with the EDX Dispatch Method

The Dynamic Dispatch feature enables you to quickly adjust the structure of your outbound purchase order message to match different online XML standards of third-party systems. If the supplier is defined to use a EDX dispatch method on the Linked Supplier Setup page, the purchase order is dispatched and electronically transmitted to the correct website by using PeopleSoft Integration Broker. PeopleSoft Integration Broker makes it possible for you to adjust quickly to meet different online XML marketing standards that might be implemented by a supplier without making code changes.

See [Setting Up Dynamic Dispatching](#).

Related Links

“Entering Supplier Identifying Information” (PeopleSoft Source to Settle Common Information)
[Understanding Direct Connect Supplier Integration](#)

Dispatching Purchase Orders

This section discusses how to use the Dispatch Purchase Orders page, select POs manually for dispatch, use batch processing to dispatch POs, send dispatched POs to suppliers, dispatch POs to the marketplace, view PO statuses and messages, and view messages entered on PO lines.

Pages Used to Dispatch Purchase Orders

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Dispatching Purchase Orders Page</u>	PV_PO_MAIN2	Select from a range of tasks for sending purchase orders to suppliers.
<u>Online Dispatcher Page</u>	PV_PO_DISPATCH	Select purchase orders for manual online dispatch using this page. The system launches PeopleSoft processes in the background to dispatch and, if needed, email and publish XML messages. If you are formatting your purchase orders using SQR, then this page only dispatches purchase orders using the EDX dispatch method with a linked supplier. If you are formatting your purchase orders using Oracle BI Publisher (select the Enable XML Publisher check box on the Purchasing page of the Installation Options component), then use this page to dispatch purchase orders with any dispatch method: print, fax, email, phone, or EDX.
<u>Dispatch POs Page</u> PO Dispatch Batch Process	RUN_DISP_POPO005	Run the process to dispatch your purchase orders. When needed, this page also publishes the EDX message or runs the Email (PO_PO_EMAIL) process. If you are formatting your purchase orders using SQR, then this run control page only dispatches purchase orders using the EDX dispatch method with a linked supplier. If you are formatting your purchase orders using Oracle BI Publisher (select the Enable XML Publisher check box on the Purchasing page of the Installation Options component), then use this run control page to dispatch purchase orders with any dispatch method: print, fax, email, phone, or EDX.

Page Name	Definition Name	Usage
<u>General Batch Dispatcher Page</u>	RUN_DISP_POPO005	Run a process to dispatch your purchase orders. For some dispatch methods, this page also publishes the EDX message or runs the Email (PO_PO_EMAIL) process. You can dispatch orders using any dispatch method: print, fax, email, phone, EDX with linked suppliers, and EDX without linked suppliers. This page only displays when you are using SQR to format your purchase orders (the Enable XML Publisher check box has not been selected on the Purchasing page of the Installation Options component). This page enables you to dispatch using any dispatch method within PeopleSoft eProcurement.
<u>Publish Dispatched POs Page</u>	PV_IN_RUN_PUB_MSG	Use this process page to electronically transmit the dispatched POs to suppliers using the Publish Outbound Message process. This page only applies to dispatched purchase orders using the EDX method without a linked supplier.
<u>Process Marketplace Orders Page</u>	PV_MS_PO_SEL_RUN	Run the Process Marketplace Orders (PV_MS_PO_SEL) process to dispatch and publish purchase orders to a marketplace. This process only applies to purchase orders with a marketplace supplier.
<u>PO Dispatch Message Log Page</u>	PV_MS_PO_DISP_ERR	View PO statuses and messages after running the dispatch process.
<u>PO Lines Dispatch Message Log Page</u>	PV_MS_PO_DISP_ERR	View messages entered on PO lines.
Publish Monitor Page	IB_MONITOR_OVRVIEW	Use the Service Operations Monitor component to monitor the electronic transmission of your purchase orders to a supplier, marketplace, or supplier's website. The PeopleSoft Integration Broker uses service operations to transmit these messages. You can monitor system service operation queues, review the delivery status of individual service operation messages, and identify any processing errors that need resolution. The Service Operations Monitor is generally used by system administrators.

Page Name	Definition Name	Usage
Process Monitor Page	PMN_PRCSLIST	Review the status of scheduled or running PeopleSoft processes. You can view all processes to see the status of any job in the queue and control processes that you initiated.

Dispatching Purchase Orders Page

Use the Dispatch Purchase Orders page (PV_PO_MAIN2) to select from a range of tasks for sending purchase orders to suppliers.

Navigation:

eProcurement > Buyer Center > Dispatch Purchase Orders

This example illustrates the fields and controls on the Dispatch Purchase Orders page with BI Publisher enabled to format purchase orders.

Dispatch Purchase Orders

Online Dispatcher
Dispatch purchase orders via Email, Fax, Print, EDX, etc.

Batch Dispatcher
Dispatch purchase orders via Email, Fax, Print, EDX, etc.

Publisher
Publish dispatched purchase orders.

Marketplace
Dispatch and Publish 'EDX' purchase orders, using xCBL 2.x only.

Dispatch Message Log
View error messages for the purchase order dispatch process.

Publish Monitor
Monitor application messaging.

Process Monitor
View the process monitor.

This example illustrates the fields and controls on the Dispatch Purchase Orders page with SQR used to format purchase orders.

Dispatch Purchase Orders

Online Dispatcher

Dispatch purchase orders via Email, Fax, Print, EDX, etc.

Batch Dispatcher

Dispatch and Publish 'EDX' purchase orders in batch.

General Batch Dispatcher

Dispatch purchase orders via Email, Fax, Print, EDX, etc.

Publisher

Publish dispatched purchase orders.

Marketplace

Dispatch and Publish 'EDX' purchase orders, using xCBL 2.x only.

Dispatch Message Log

View error messages for the purchase order dispatch process.

Publish Monitor

Monitor application messaging.

Process Monitor

View the process monitor.

Using the Dispatch Purchase Orders page, you can select from a range of tasks for sending purchase orders to suppliers. The Dispatch Purchase Orders page displays different options based on your selection of the Enable XML Publisher check box on the Purchasing page of the Installation Options component. When this check box is selected, the Oracle BI Publisher is used to format and print purchase orders in PeopleSoft eProcurement and PeopleSoft Purchasing. When this check box is not selected, the SQR programming language is used to format purchase orders. Choosing the Oracle BI Publisher gives you the flexibility of changing the purchase order formats by choosing different report template IDs for different types of purchase orders. The template ID for dispatched purchase order can be defined at the system-level, business unit level, or on the run control for the dispatch process.

Using the Dispatch Purchase Orders page, you can select the following links:

Link on Dispatch Purchase Orders page	Action With BI Publisher	Action With SQR
Online Dispatcher	Access the Online Dispatcher page (PV_PO_DISPATCH) where you can dispatch purchase orders using any dispatch method: print, fax, email, phone, EDX with linked suppliers, and EDX without linked suppliers. The PeopleSoft Job POXMLP is used to dispatch purchase orders.	Access the Online Dispatcher page (PV_PO_DISPATCH) where you can dispatch purchase orders using only the EDX dispatch method with linked suppliers. The PeopleSoft Job POXMLP is used to dispatch purchase orders.

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<i>Link on Dispatch Purchase Orders page</i>	<i>Action With BI Publisher</i>	<i>Action With SQR</i>
Batch Dispatcher	Access the Dispatch POs run control page where you can select criteria to dispatch purchase orders. You can dispatch orders using any dispatch method: print, fax, email, phone, EDX with linked suppliers, and EDX without linked suppliers. The PeopleSoft Job POXMLP is used to dispatch purchase orders. In addition, you can use this run control to change the report template ID used by the BI Publisher to generate purchase orders.	Access the PO Dispatch Batch Process run control page where you can select criteria to run the dispatch process. You can only dispatch purchase orders using the EDX dispatch method with linked suppliers. The PeopleSoft Job POXMLP is used to dispatch purchase orders.
General Batch Dispatcher	(Does not display when BI Publisher is enabled)	Access the Dispatch Purchase Orders run control page where you can select criteria to dispatch purchase orders. You can dispatch orders using any dispatch method: print, fax, email, phone, EDX with linked suppliers, and EDX without linked suppliers. The SQR process PO Dispatch/Print (POPO005) or the PeopleSoft Job POXMLP can be used to dispatch purchase orders.
Publisher	This page only applies to dispatched purchase orders using the EDX method without a linked supplier. Access this run control page to define selection criteria to publish dispatched purchase orders that are in the outbound staging tables and that use the batch publish design pattern. You can specify whether to send purchase orders based on business unit or supplier. This Publish Outbound Message process generates a Purchase Order Dispatch EIP transaction. See “Example: Processing the Purchase Order Dispatch EIP” (PeopleSoft Supply Chain Management Integration).	(same as previous column)
Marketplace	Dispatch and publish purchase orders with Marketplace suppliers.	(same as previous column)
Dispatch Message Log	Access the PO Dispatch Message Log page to view the outbound purchase order messages.	(same as previous column)

Link on Dispatch Purchase Orders page	Action With BI Publisher	Action With SQR
Publish Monitor	Use the Publish Monitor to review information about the delivery status of individual service operation messages and to help resolve processing errors.	(same as previous column)
Process Monitor	Use the Process Monitor to review the status of scheduled or running PeopleSoft processes. You can view all processes to see the status of any job in the queue and control processes that you initiated.	(same as previous column)

Note: To prevent end-user error, it is recommended that you use PeopleTools to remove from view on the run control's Process Scheduler Request page the dispatch process that is not used by your organization. For example, if you choose to enable the BI Publisher for formatting purchase orders, then it is recommended that you remove the POPO005 SQR process from viewing on the dispatch run controls because this SQR process is never used.

PeopleTools: BI Publisher for PeopleSoft

Related Links

[Understanding Purchase Order Dispatch](#)

Online Dispatcher Page

Use the Online Dispatcher page (PV_PO_DISPATCH) to select purchase orders for manual online dispatch using this page.

The system launches PeopleSoft processes in the background to dispatch and, if needed, email and publish XML messages. If you are formatting your purchase orders using SQR, then this page only dispatches purchase orders using the EDX dispatch method with a linked supplier. If you are formatting your purchase orders using Oracle BI Publisher (select the Enable XML Publisher check box on the Purchasing page of the Installation Options component), then use this page to dispatch purchase orders with any dispatch method: print, fax, email, phone, or EDX.

Navigation:

Click the **Online Dispatcher** link on the Dispatch Purchase Orders page.

This example illustrates the fields and controls on the Online Dispatcher page with Oracle BI Publisher enabled. You can find definitions for the fields and controls later on this page.

Online Dispatcher

Search Criteria

Business Unit Buyer

PO ID Dispatch Method

Date From Date To

Supplier ☐ Include Dispatched PO(s) ☐ Linked Supplier(s) Only

P O Listing Personalize | Find | View All | First 1-10 of 28 Last

Sel	PO ID	PO Date	PO Status	Buyer Name	Supplier	Name	Process Status	Dispatch Method
☐	0000000251	10/01/2012	Approved	Kenneth Schumacher	USA00HIER1	Supplier Hierarchy 1		Print
☐	0000000235	08/06/2012	Approved	Kenneth Schumacher	USA0000009	Quick Pace Couriers		Print
☐	0000000234	08/06/2012	Approved	Kenneth Schumacher	SCM0000002	CAMPER'S WAREHOUSE		Print
☐	0000000232	03/05/2010	Approved	Hosking, Andrew	SCM0000001	BIKE SHOP		Email
☐	0000000204	06/22/2009	Approved	Calvin Roth	USA0000038	CompUSA		Print
☐	0000000186	01/25/2007	Approved	Phillips, Jarred	SCM0000004	ERNIE'S BIKE SHOP		Print
☐	0000000180	07/25/2006	Approved	Phillips, Jarred	SCM0000004	ERNIE'S BIKE SHOP		Print
☐	0000000178	05/25/2006	Approved	Phillips, Jarred	SCM0000004	ERNIE'S BIKE SHOP		Print
☐	0000000170	04/05/2006	Approved	Hosking, Andrew	SCM0000004	ERNIE'S BIKE SHOP		Print
☐	0000000163	04/05/2006	Approved	Hosking, Andrew	USA0000001	Bay Area Electric-		Print

[Return to Dispatch Purchase Orders](#) [Process Monitor](#)

This example illustrates the fields and controls on the Online Dispatcher page with SQR enabled. You can find definitions for the fields and controls later on this page.

Online Dispatcher

Search Criteria

Business Unit Buyer

PO ID Dispatch Method

Date From Date To

Supplier ☐ Include Dispatched PO(s) ☒ Linked Supplier(s) Only

No matching POs were found.

[Return to Dispatch Purchase Orders](#) [Process Monitor](#)

Use the Online Dispatcher page to select purchase orders for manual online dispatch. The system launches PeopleSoft processes in the background to dispatch and, if needed, email and publish XML messages. If you are formatting your purchase orders using SQR, then this page only dispatches purchase orders using the EDX dispatch method with a linked supplier (Oracle Business Network, marketplace or Direct Connect). If you are formatting your purchase orders using Oracle BI Publisher (select the Enable XML Publisher check box on the Purchasing page of the Installation Options component), then use this page to dispatch purchase orders with any dispatch method: print, fax, email, phone, or EDX. If this PO is being sent to a direct connect supplier, this page sends the PO directly to the vendor's website.

Field or Control	Description
Business Unit	Select the Purchasing business unit containing the purchase orders that you want to dispatch.
Buyer	Select a buyer to narrow the selection of purchase orders displayed in the PO Listing group box.
Dispatch Method	Select a dispatch method to narrow the selection of purchase orders displayed in the PO Listing group box. If the Oracle BI Publisher has been enabled, you can choose any dispatch method: print, fax, email, phone, or EDX. If SQR is used to format your purchase orders (that is, the Oracle BI Publisher has not been enabled), then this page is limited to purchase orders using the EDX dispatch method with a linked supplier.
Date From and Date To	Enter a date range to narrow the selection of purchase orders displayed in the PO Listing group box.
Supplier	Enter a supplier ID to display only purchase orders for this supplier.
Include Dispatched PO(s)	Select this check box to include purchase orders that have already been dispatched. This enables you to re-dispatch them if needed. Deselect this check box to display only <i>Approved</i> purchase orders.
Linked Supplier(s) Only	Select to limit the purchase orders displayed to orders with linked suppliers. Linked suppliers are marketplace suppliers and direct connect suppliers (Punchout, Transparent Punchout, and Roundtrip). If SQR is used to format your purchase orders (that is, the Oracle BI Publisher has not been enabled), then this page is limited to purchase orders using the EDX dispatch method with a linked supplier.
Search	Click this button to initiate your search and display purchase orders in the PO Listing group box that meet your search criteria. The system only selects purchase orders with a PO Status of <i>Approved</i> , <i>Dispatched</i> , or <i>Pending Cancel</i> .
Clear	Click this button to erase your search criteria.

Field or Control	Description
Sel	Select this check box for each individual purchase order that you want to dispatch using this page.
Dispatch PO(s)	Click this button to automatically dispatch the purchase orders selected above.

Dispatch POs Page

Use the Dispatch POs page (RUN_DISP_POPO005) to run the process to dispatch your purchase orders.

When needed, this page also publishes the EDX message or runs the Email (PO_PO_EMAIL) process. If you are formatting your purchase orders using SQR, then this run control page only dispatches purchase orders using the EDX dispatch method with a linked supplier. If you are formatting your purchase orders using Oracle BI Publisher (select the Enable XML Publisher check box on the Purchasing page of the Installation Options component), then use this run control page to dispatch purchase orders with any dispatch method: print, fax, email, phone, or EDX.

Navigation:

Click the **Batch Dispatcher** link on the Dispatch Purchase Orders page.

This example illustrates the fields and controls on the Batch Dispatcher (Dispatch POs page) with Oracle BI Publisher enabled. You can find definitions for the fields and controls later on this page.

The Batch Dispatcher page with Oracle BI Publisher enabled runs the PeopleSoft Job POXMLP to dispatch your purchase orders. This process can dispatch orders using any dispatch method: print, fax, email, phone, EDX with linked suppliers, and EDX without linked suppliers.

For field definitions on this run control page, see “Dispatching Purchase Orders” (PeopleSoft Purchasing).

See “Dispatch POs Page” (PeopleSoft Purchasing).

This example illustrates the fields and controls on the Batch Dispatcher page with SQR enabled. You can find definitions for the fields and controls later on this page.

The Batch Dispatcher (PO Dispatch Batch Process page) with SQR enabled runs the PeopleSoft Job POXMLP. This process only dispatches purchase orders using the EDX dispatch method with link suppliers. The field definitions are:

Field or Control	Description
Business Unit	Select a specific business unit from which to dispatch POs using batch processing.
Buyer Name	Select a specific buyer from whom to dispatch POs using batch processing.
Supplier ID	Select a specific supplier to which you want to dispatch POs using batch processing. If you leave the field empty, POs for all suppliers that meet other criteria that you enter are included in the batch processing.
From Date and Through Date	Enter a date range to narrow the selection of purchase orders to be dispatched by this process.

General Batch Dispatcher Page

Use the General Batch Dispatcher page (RUN_DISP_POPO005) to run a process to dispatch your purchase orders.

For some dispatch methods, this page also publishes the EDX message or runs the Email (PO_PO_EMAIL) process. You can dispatch orders using any dispatch method: print, fax, email, phone, EDX with linked suppliers, and EDX without linked suppliers.

Navigation:

Click the **General Batch Dispatcher** link on the Dispatch Purchase Orders page.

This example illustrates the fields and controls on the The General Batch Dispatcher process page with SQR enabled.

You can dispatch orders using any dispatch method: print, fax, email, phone, EDX with linked suppliers, and EDX without linked suppliers.

Note: This page only displays when you are using the SQR Reports to format your purchase orders (the Enable XML Publisher check box has not been selected on the Purchasing page of the Installation Options component). This page enables you to dispatch within PeopleSoft eProcurement using any dispatch method.

For field definitions on this run control page, see “Dispatching Purchase Orders” (PeopleSoft Purchasing).

See “Dispatch POs Page” (PeopleSoft Purchasing).

Publish Dispatched POs Page

Use the Publish Dispatched POs page (PV_IN_RUN_PUB_MSG) to use this process page to electronically transmit the dispatched POs to suppliers using the Publish Outbound Message process.

This page only applies to dispatched purchase orders using the EDX method without a linked supplier.

Navigation:

Click the **Publisher** link on the Dispatch Purchase Orders page.

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

Run Control ID

Publisher

Report Manager

Process Monitor

Run

*Request ID

Description

Selection Type

Select BU

BU Selection

All BUs

Business Unit

Supplier Selection

All Supplier

Supplier SetID

Supplier ID

Location

[Return to Dispatch Purchase Orders](#)

Use this page to launch the Publisher (IN_PUB_MSGIN_PUB_MSG) process. This is a PeopleSoft Application Engine process that electronically transmits the purchase orders using the EDX dispatch method without a linked supplier.

Field or Control	Description
Request ID	Enter an identifier for this process run.
Selection Type	Select a criteria for selecting POs to publish. The selection determines the access to other fields on this page. Values are: <i>Select BU</i> (select business unit): Select by business unit. <i>Select Ven</i> (select supplier): Select by supplier ID.

If you select the selection type, *Select BU*, define these settings:

Field or Control	Description
BU Selection	<i>I Bus Unit</i> (one business unit): Select to publish POs to suppliers that are associated with a specific business unit. <i>All BUs</i> : Select to publish POs to suppliers that are associated with all business units.
Business Unit	Enter the business unit that is associated with the suppliers to which you want to publish POs.

If you select the selection type *Select Ven*, define these settings:

Field or Control	Description
Supplier Selection	Values are: <i>1 Supplier</i> : Select to publish POs to a specific supplier. <i>All Supplier</i> : Select to publish POs to all suppliers associated with a specified SetID.
Supplier SetID	Select the SetID that is associated with the suppliers to which you want to publish POs.
Supplier ID	If you selected the Supplier selection type <i>1 Supplier</i> , select the supplier to which you want to publish POs.
Location	If you selected the supplier selection type <i>1 Supplier</i> , select the supplier location where you want to publish POs.

Process Marketplace Orders Page

Use the Process Marketplace Orders page (PV_MS_PO_SEL_RUN) to run the Process Marketplace Orders (PV_MS_PO_SEL) process to dispatch and publish purchase orders to a marketplace.

This process only applies to purchase orders with a marketplace supplier.

Navigation:

Click the **Marketplace** link on the Dispatch Purchase Orders page.

This example illustrates the fields and controls on the Process Marketplace Orders page.

Run Control ID Marketplace Report Manager Process Monitor Run

Execution Parameters

☒ Re-Process Errors ☐ Allow Re-Dispatch ☒ Run Order Status Check

Business Unit

PO Number

[Return to eProcurement Processes](#)

Run the Process Marketplace Orders (PV_MS_PO_SEL) process to dispatch and publish purchase orders to a marketplace. This process only applies to purchase orders with a marketplace supplier.

Related Links

[Understanding the Integration Between a Marketplace and PeopleSoft eProcurement](#)

PO Dispatch Message Log Page

Use the PO Dispatch Message Log page (PV_MS_PO_DISP_ERR) to view PO statuses and messages after running the dispatch process.

Navigation:

Click the **Dispatch Message Log** link on the Dispatch Purchase Orders page.

This example illustrates the fields and controls on the PO Dispatch Message Log page. You can find definitions for the fields and controls later on this page.

PO Dispatch Message Log

Search by the following criteria :

*Business Unit PO Number Buyer

Date From Through Date Status

PO No.	Date	PO Status	Status	Message
0000000058	08/12/2003	Dispatched	Dispatched	Purchase Order is dispatched, Needs to be published.
0000000057	08/05/2003	Dispatched	Dispatched	Purchase Order is dispatched, Needs to be published.
0000000056	08/05/2003	Dispatched	Dispatched	Purchase Order is dispatched, Needs to be published.

[Return to Dispatch Purchase Orders](#)

All POs appear for these dispatch methods:

- Dispatched to the marketplace.
- Electronically transmitted to the supplier by using the dispatch and publish processes.

Field or Control	Description
Search	Click the Search button to retrieve POs based on the criteria you entered in the upper half of the page. The Status column is updated with the results. If the marketplace has received the order, the PO Status column changes to <i>Dispatched</i> .

This information appears for each PO the search locates:

Field or Control	Description
Date	Displays the PO date from the PO header.
PO Status	Displays the current status of the PO within PeopleSoft eProcurement. This status is from the PO header in PeopleSoft eProcurement.

Field or Control	Description
Status	Reflects the stage of the PO within the dispatch process. The status that appears could reflect the stage of the PO when electronically transmitted to the supplier or when dispatched to the marketplace. When the PO is electronically transmitted to the supplier, the values include: <i>Error:</i> PO has not been dispatched nor published. <i>Dispatched:</i> PO has been dispatched. <i>Published:</i> PO has been dispatched and published. When the PO is dispatched to the marketplace, values include: <i>Received:</i> PO has been sent by PeopleSoft eProcurement and received by the marketplace. The system has not yet received a response from the marketplace. <i>Accepted:</i> The marketplace has received the PO, and the supplier has responded and accepted it. Comments attached to the PO header or line might also appear. <i>Completed:</i> The PO has been sent to the marketplace, accepted by the supplier, the goods or services have been received, and the supplier has been paid. <i>No Accept:</i> The marketplace has received the PO and the supplier has responded and rejected it. Comments that were attached by the supplier appear in the Message column. <i>Cancelled:</i> Supplier has accepted the PO, but has canceled the order for a later time. <i>Pre-Pymt Required:</i> Supplier has accepted the PO and has assigned this status to indicate that a prepayment is required to fulfill the order. <i>Other:</i> Supplier has accepted the PO and later assigned this status to indicate that there is a problem with the order. The supplier's messages at the PO header or line level should detail this problem. <i>Completed:</i> PO has been sent to the marketplace, accepted by the supplier, the goods or services have been received, and the supplier has been paid.
	Click the PO Lines Error Messages button to review comments from the marketplace supplier about a PO line. This button is only available for POs sent to the marketplace.
Message	For POs that are electronically transmitted to the supplier, this column displays a message indicating whether the system encountered errors when dispatching or publishing POs. For POs sent to the marketplace, this column displays messages entered by the marketplace supplier on the PO header.

PO Lines Dispatch Message Log Page

Use the PO Lines Dispatch Message Log page (PV_MS_PO_DISP_ERR) to view messages entered on PO lines.

Navigation:

Click the **Dispatch Message Log** link on the PO Dispatch Message Log page.

<i>Field or Control</i>	<i>Description</i>
Line Number	Displays the line number of the PO. Only lines that contain supplier messages appear. The PO could contain additional lines that do not appear.
Message Text	Displays any message entered by the marketplace supplier on this PO line.

Formatting Purchase Orders With Oracle BI Publisher

The purchase order format determines the layout of the purchase order when it is printed, faxed, attached to an email, or electronically transmitted using EDX. To format the purchase order, you can choose between SQR and Oracle BI Publisher. If you choose Oracle BI Publisher, then the system uses the PeopleSoft Job POXMLP to dispatch the purchase orders.

BI Publisher is a template-based reporting solution that separates the data extraction process from the report layout and enables the reuse of extracted application data into multiple report layouts. You can change the format or layout of a purchase order report without changing the underlying program that controls the business logic. The format and layout includes the appearance of the report and addition or removal of fields on the report as long as those fields are available as part of the PO dispatch data. Change the purchase order formats by choosing different report template IDs for different types of purchase orders. The template ID for dispatched purchase order can be defined at the system-level, the business unit level, the run control for the dispatch process, or the individual purchase order. To use the BI Publisher for purchase orders in both PeopleSoft eProcurement and PeopleSoft Purchasing, select the Enable XML Publisher check box on the Purchasing page of the Installation Options component.

PeopleSoft is delivered with sample data already set up to generate an BI Publisher purchase order that uses the same format as the SQR report. Use this data as a starting point to create your own layout for purchase orders using the BI Publisher. This data in BI Publisher (Reporting Tools, BI Publisher) includes:

- Report Definition: PO_DISPATCH
- Data Source ID: PO_DISPATCH
- Template File: PO_DISPATCH.RTF

Default Hierarchy for the Template ID

When dispatching purchase orders, the system must identify the BI Publisher template ID. The template ID for a purchase order can be defined on the:

1. *Purchase Order*: Enter the template ID for an individual purchase order using the PO Header Details page or the Dispatch Options page. If the Template ID field is blank on the purchase order, then the system looks to the:
2. *Run Control Page for the Dispatch Process*: Enter the template ID for the individual process run of the dispatch process. This dispatch process is the PeopleSoft Job POXMLP and can be accessed from the Batch Dispatcher page in PeopleSoft eProcurement or the Dispatch Purchase Orders page in PeopleSoft Purchasing. If the Template ID field is blank on this run control page, then the system looks to the:
3. *Purchasing Business Unit*: Enter the template ID for all purchase orders dispatched within one business unit by entering the template ID on the Purchase Order Images page within the Purchasing Business Unit component (BUS_UNIT_PM). If the Template ID field is blank on the Purchase Order Images page, then the system uses the:
4. *Report Definition in BI Publisher*: Identify the default template ID on the Report Definition-Template page within the BI Publisher.

Pages Used to Format Purchase Orders With Oracle BI Publisher

Page Name	Definition Name	Usage
"Installation Options - Purchasing Page" (Application Fundamentals)	INSTALLATION_PO	Select the Enable XML Publisher check box to use BI Publisher to format your purchase orders in PeopleSoft eProcurement and PeopleSoft Purchasing.
Report Definition-Template	PSXPRPTTMPL	Associate one or more template IDs with a report definition, such as PO_DISPATCH. Select the Default Template check box to identify one template ID as the default to be used.
Purchase Order Images (Define Dispatch Options)	BUS_UNIT_PM_IMAGE	Use the Template ID field to define a report template for this PeopleSoft Purchasing business unit. Oracle BI Publisher uses this report template for all purchase orders within the business unit unless overridden by another template ID on the individual purchase order or the dispatch process run control page.

Page Name	Definition Name	Usage
Dispatch Purchase Orders	RUN_DISP_POPO005	In the Template ID field, select the report template that you want to use with this dispatch process (PeopleSoft Job POXMLP). This field applies to the individual process run and overrides the template ID selected at the business unit level or system-level.
PO Header Details	PO_HDR_DTL	Use the Template ID field to define an BI Publisher report template for this purchase order.
Dispatch Options	DISPATCH_OPTIONS	Use the Template ID field to define an BI Publisher report template for this purchase order.

PeopleTools: BI Publisher for PeopleSoft

Setting Up Dynamic Dispatching

To set up dynamic dispatching, use the EDX Dispatch Types component (PV_EDX_TYPE).

This section provides an overview of dynamic dispatching and discusses how to:

- Define dynamic dispatch EDX dispatch types.
- Link dynamic dispatch types to suppliers.
- Dispatch dynamic dispatch POs.

Pages Used to Set Up Dynamic Dispatching

Page Name	Definition Name	Usage
EDX PO Dispatch Types Page	PV_EDX_TYPE	Define dynamic dispatch types for EDX.
Linked Suppliers Page	PV_MS_SEC_SUPPLIER	Link dynamic dispatch types to suppliers.
Marketplace Buyer Setup Page	PV_MS_SEC_BUYER	Set up marketplace buyers for dynamic dispatch.

Understanding Dynamic Dispatching

Dynamic dispatching is a dispatch method that runs as a background process. You use the same pages to define this type of dispatching as you do with other dispatch types. The advantage of dynamic dispatching; however, is that it leverages a common set of logic to dispatch purchase orders. This enables you to quickly adjust to meet different online XML standards that might be implemented by a supplier or a website.

You can dispatch a PO as an XML document in a defined format. If the structure of that format is not compatible with the structure of the XML document required to integrate with a third-party supplier, then PeopleSoft Integration Broker can convert the structure using PeopleSoft Application Engine transformation programs. Using different connectors and a framework for transforming an XML message to another XML message, the Integration Broker makes it possible to develop a uniform and consistent interface for integration.

The PeopleSoft integration to the Oracle Business Network uses dynamic dispatching. The Oracle Business Network uses the Open Application Group (OAG) format for XML documents. For outbound transactions from the PeopleSoft eProcurement or Purchasing applications, the PeopleSoft Integration Broker uses application engine transformation programs to convert XML messages that use the PeopleSoft format (PSXML) into OAG XML files. For inbound transactions from the Oracle Business Network, OAG XML messages are sent to the PeopleSoft Integration Broker where transformation programs convert the incoming files into the PSXML format.

When a supplier changes to a different XML standard, then using the Integration Broker, you can react with a format to meet that standard. To adjust for the change, dynamic dispatching uses the Integration Broker's transformation capabilities to send xCBL, cXML, OAG, or EDX files. The Integration Broker uses a common set of logic to identify POs eligible for dispatching.

Related Links

[Understanding the Integration Between a Marketplace and PeopleSoft eProcurement](#)

EDX PO Dispatch Types Page

Use the EDX PO Dispatch Types page (PV_EDX_TYPE) to define dynamic dispatch types for EDX.

Navigation:

eProcurement > Administer Procurement > Maintain Supplier Integration > EDX PO Dispatch Types

This example illustrates the fields and controls on the EDX PO Dispatch Types page. You can find definitions for the fields and controls later on this page.

EDX PO Dispatch Types

EDX PO Dispatch Type

Root Package ID

Application Class Path

Description

[Return to Administer Procurement](#)

Save
 Return to Search
 Notify

Add
 Update/Display

Use this page to define EDX dispatch types for use with dynamic dispatching.

Field or Control	Description
EDX PO Dispatch Type	Define the dispatch type. The system is delivered with the following types: <i>CXML12</i>: For integration with a supplier using the cXML format. <i>OAG72</i>: For integration with the Oracle Business Network (OAG format). <i>XCBL30</i>: For integration with a marketplace (xCBL format).
Root Package ID	Enter the PeopleSoft application package. The system is delivered with the application package SCM_PV_PO_DISPATCH.

Field or Control	Description
Application Class Path	Enter the PeopleSoft application class to be used within the application package. The following application classes are delivered within the application package SCM_PV_PO_DISPATCH: • <i>CxmlPurchaseOrder</i>: For integration with a supplier using the cXML format. • <i>OAGPurchaseOrder</i>: For integration with the Oracle Business Network (OAG format). • <i>XcblPurchaseOrder</i>: For integration with a marketplace (xCBL format).

Setting Up and Sending POs to Suppliers by EDX

This section discusses how to:

- Activate the purchase order dispatch service operation.
- Define batch publish rules.
- Specify source data for records.
- Associate publish processes with rules.
- Send PO service operations.

By using the EDX method, you can transmit dispatched POs to suppliers that are neither marketplace suppliers nor direct connect suppliers by converting POs into service operation messages and sending them to suppliers.

Pages Used to Set Up and Send POs to Suppliers By EDX

Page Name	Definition Name	Usage
Batch Publish Rules	EO_MSGPUBATCH	Define batch publishing rules that determine how the dynamic dispatch transactions should be sent electronically.
Record Mapping	EO_MSGRECMAP	Specify source data for records (such as POs) in messages.
Batch Programs	EO_MSGBATPGM	Associate publish processes with rules.
Add Nodes to Chunk Rule	EO_ADNODECHUNK_PNL	Map nodes to chunk rules.

Activating the Purchase Order Dispatch Service Operation

PeopleSoft delivers a purchase order dispatch service operation, which enables eProcurement to send POs to suppliers by EDX. The PURCHASE_ORDER_DISPATCH is an outbound asynchronous service operation.

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

To set up this service operation, use the information in this table and refer to the setup instruction in “Setting Up Service Operations” (PeopleSoft Supply Chain Management Integration) .

<i>Service Operation</i>	<i>Direction and Type</i>	<i>Handlers</i>	<i>Chunking Available?</i>	<i>Integrates With</i>
PURCHASE_ORDER_DISPATCH	Outbound Asynchronous	ROUTERSENDHDLR	Yes	third-party system

Batch Publish Rules Page

Use the Batch Publish Rules page (EO_MSGPUBATCH) to define batch publishing rules that determine how the dynamic dispatch transactions should be sent electronically.

Navigation:

Enterprise Components > Integration Definitions > Batch Publish Rules

This example illustrates the fields and controls on the Batch Publish Rules page.

The screenshot shows the 'Batch Publish Rules' page. The 'Batch Publish Rules' tab is active. The form displays the following details:

- Service Operation:** EM_PO_MSG
- Operation Description:** Purchase Order Message
- Message.Version:** EM_PO_MSG.VERSION_1
- Publish Rule Definition:**
 - *Publish Rule ID: [Empty field]
 - *Description: [Empty field]
 - *Status: Inactive (dropdown menu)
 - Chunking Rule ID: [Empty field]
 - Alternate Chunk Table: [Empty field]
- Message Options:**
 - ☒ Create Message Header
 - ☒ Create Message Trailer
- Output Format:**
 - ☒ Message
 - ☐ Flat File
 - ☐ Flat File with Control Record

Use this page to associate a rule to a message and characterize the rule.

Batch publish rules describe jobs or processes that run independently from their initiating process. A batch process can also run at one or more predetermined times in the future from the initiating request. This is appropriate for publishing incremental changes to data in a batch environment or when processing large volumes.

Record Mapping Page

Use the Record Mapping page (EO_MSGRECMAP) to specify source data for records (such as POs) in messages.

Navigation:

Enterprise Components > Integration Definitions > Batch Publish Rules > Record Mapping

This example illustrates the fields and controls on the Record Mapping page.

The screenshot shows the 'Record Mapping' page with the following details:

- Tabs:** Batch Publish Rules, Record Mapping (active), Batch Programs
- Service Operation:** EM_PO_MSG
- Message.Version:** EM_PO_MSG.VERSION_1
- Operation Description:** Purchase Order Message
- Publish Rule Definition:**
 - *Publish Rule ID: [Text Field]
 - *Description: [Text Field]
- Record Source Mapping:**
 - Message Record Name: [Text Field with magnifying glass icon]
 - Source/Order by Record Name: [Text Field with magnifying glass icon]
- Navigation:** Find | View All, First, 1 of 1, Last

Use this page to map the **Message Record Name** to the **Source/Order by Record Name**.

Batch Programs Page

Use the Batch Programs page (EO_MSGBATPGM) to associate publish processes with rules.

Navigation:

Enterprise Components > Integration Definitions > Batch Publish Rules > Batch Programs

This example illustrates the fields and controls on the Batch Programs page.

The screenshot shows the 'Batch Programs' page. At the top, there are three tabs: 'Batch Publish Rules', 'Record Mapping', and 'Batch Programs'. The 'Batch Programs' tab is selected. Below the tabs, there are two main sections. The first section, 'Publish Rule Definition', has a 'Service Operation' field set to 'EM_PO_MSG' and a 'Message.Version' field set to 'EM_PO_MSG.VERSION_1'. It also has a 'Find | View All' link and navigation buttons for 'First', '1 of 1', and 'Last'. Below this are two input fields: '*Publish Rule ID' and '*Description'. The second section, 'Batch Programs', also has a 'Find | View All' link and navigation buttons for 'First', '1 of 1', and 'Last'. It contains two input fields: 'Process Name' and 'Description'.

Use this page to assign an application program (PROCESS_NAME) to the publish rule.

Sending PO Service Operations

To send purchase order service operations:

1. Dispatch POs.

Use the Online Dispatcher page or the Batch Dispatcher page to dispatch POs and load them into interface tables.

2. Convert POs into XML service operations.

Use the Publisher page to initiate the Publisher process. The Publisher process converts the POs in the interface tables into XML service operations and publishes those service operations to the suppliers.

Related Links

[Dispatching Purchase Orders](#)

Accessing the Service Operations Monitor and Process Monitor Components

You monitor system service operation queues through the Service Operations Monitor. It provides information about the delivery status of individual service operations and aids in error processing and resolution. The Service Operations Monitor is generally used by system administrators.

After you submit a job using the Process Scheduler Request page, use the Process Monitor to review the status of scheduled or running processes. You can view all processes to see the status of any job in the queue and control processes that you initiated. The Process Monitor consists of two pages: the Process List page and the Server List page.

Pages Used to Access the Service Operations Monitor and Process Monitor Components

Page Name	Definition Name	Usage
Monitor Overview	IB_MONITOR_OVRVIEW	Access high-level service operation information so that you can isolate areas for detailed information. This includes the status of asynchronous service operation messages, publication contracts, and subscription contracts. <i>PeopleTools: Integration Broker</i>
Operation Instances	IB_MONITOR_PUBHDR	Monitor operation instances. This includes information related to the individual asynchronous service operation instances that exist in a live or an archived system. <i>PeopleTools: Integration Broker</i>
Publication Contracts	IB_MONITOR_PUBCON	View publishing contracts. These are outbound service operations that you are sending to remote message nodes with which the system is interacting. <i>PeopleTools: Integration Broker</i>
Subscription Contracts	IB_MONITOR_SUBCON	View subscription contracts. These are service operations to run PeopleCode programs to which the local node receives. <i>PeopleTools: Integration Broker</i>
Synchronous Services	AMM_SYNCMSGLIST	View synchronous service operations. These are inbound service operations from remote nodes or applications that send information.
Domain Status	AMM_MULTIDOM	Use this page to view the domains that have publishing and subscription servers on them that are running against the application database. <i>PeopleTools: Integration Broker</i>

Page Name	Definition Name	Usage
Node Status	AMM_NODE_STATUS	Use this page to maintain pause times. A pause time is an interval of time during which the de becomes inactive. When the pause time begins, the node is shut down until the pause time is scheduled to end. <i>PeopleTools: Integration Broker</i>
Queue Status	IB_MONITOR_QUEUES	Use this page to view, pause, and start service operation queues. <i>PeopleTools: Integration Broker</i>
Statistics	AMM_STATISTICS	View messaging runtime performance data. <i>PeopleTools: Integration Broker</i>
Process List	PMN_PRCSLIST	Use this page to monitor the process requests that you submit. This page enables the user to see if a process encounters an error, or if a server is not operating, the user can also see the processes that are queued to run at a future time. <i>PeopleTools: Process Scheduler</i>
Server List	PMN_SRVRLIST	Use this page to view information about each of the Process Scheduler server agents that are defined in the system. <i>PeopleTools: Process Scheduler</i>

PeopleTools: Integration Broker

Using the Approval Framework in PeopleSoft eProcurement

Understanding the Approval Framework

Many daily tasks are part of a larger process that involves several steps and people working together. The term *workflow* refers to this process, which could encompass, for example, the approval of a requisition. To facilitate this type of multiuser process, the PeopleSoft product can automatically trigger workflow notifications to inform the next approver in the process of work awaiting him or her. When the process is complete, the transaction is promoted to its next stage. In the case of a requisition, the next stage is that it is sourced as a purchase order. PeopleSoft applications offer two types of workflow:

1. PeopleTools Workflow Technology, documented in the *PeopleTools: Workflow Technology*. This method requires you to use PeopleSoft Application Designer, PeopleCode, and Workflow Administrator.
2. PeopleSoft Approval Framework, documented in the *PeopleSoft Approval Framework*. The standard PeopleSoft workflow requires advanced technical skills in PeopleSoft PeopleTools to create and maintain workflow; in contrast, the Approval Framework provides an alternative workflow that is much easier to create and maintain. For example, all of the steps in Approval Framework are defined by means of PeopleSoft pages rather than the underlying PeopleSoft PeopleCode, so functional users can design and maintain workflow using these online PeopleSoft pages without technical developers having to create workflow rules.

Within PeopleSoft eProcurement, the approval of requisitions is handled by the Approval Framework. Most of the work has already been done for you and is delivered with your PeopleSoft system. You need to activate the workflow and adjust the approval setup to identify your individual users, templates, and servers. This chapter discusses the setup of requisition approval within PeopleSoft eProcurement. Requisitions that have been changed and require reapproval are approved in the same component as the original requisitions.

After a requisition is created, the system routes the transaction to an approver. The approver can view and take action in two ways: using his or her worklist or navigating directly to the Manage Requisition Approvals page. The approver can preview, in a graphical format, the path that the requisition approval will take, view who has already approved the requisition, and see any comments that previous approvers have entered.

While the system awaits approval action, the approval framework maintains the overall state of the requisition, invokes routings, and interacts with the application classes.

During the approval process these actions take place:

- The system notifies approvers and reviewers that a pending requisition needs their attention.
- Approvers and reviewers access the requisition details, provide comments, and take action (approve, deny, or push back) for the requisition.

- The system checks for additional routings in the same routing path.

If all steps have been completed for the stage, then the next step is started in the next stage. If multiple routing paths exist, the system routes them in parallel.

- Once all approvers of a requisition have approved it, the Approval Framework notifies the PeopleSoft eProcurement application. The requisition is then ready for the next step.

PeopleSoft Approval Framework

Setting Up Approval Framework in PeopleSoft eProcurement

This section discusses how to:

- Set up the Approval Framework in PeopleSoft eProcurement.
- Use the Maintain Approval Workflow page.
- Set up email approvals for PeopleSoft eProcurement.
- Determine the maximum requisition lines to display.
- Set up and use the Mobile Approval Framework for PeopleSoft eProcurement.

Complete information about the setup and use of the Approval Framework is located in the *PeopleSoft Approval Framework* documentation.

Use the following steps to set up the requisition approval process within PeopleSoft eProcurement:

Pages Used to Set Up Approval Framework in PeopleSoft eProcurement

Page Name	Definition Name	Usage
<u>Maintain Workflow Page</u>	PV_ADM_WORKFLOW	Access many of the pages and components that you use to set up the Approval Framework for PeopleSoft eProcurement. Access to this page is limited to users with the SYSTEM_ADMIN action role.
User Profiles - Roles	USER_ROLES	Attach workflow roles to users. “Defining Users for Approval Framework” (Approval Framework)
User Profiles - Workflow	USER_WORKFLOW	Define supervisors. “Defining Users for Approval Framework” (Approval Framework)

Page Name	Definition Name	Usage
User List Definition	PTAF_USER_LIST	Define user-list definitions. “Defining Users for Approval Framework” (Approval Framework)
<u>eProcurement Role Actions Page</u>	PV_ACTIONS	Assign actions to user roles.
User Preferences: Procurement - Requisition Authorizations	OPR_REQ_AUTH	Authorize users to initiate and update requisitions for applicable requesters. Define a user's requisition processing authority in relation to applicable requesters.
“Change Template Page” (PeopleSoft Source to Settle Common Information)	CHNG_ORD_TEMPLATE	Identify the fields on a requisition, purchase order, or contract that can initiate the following actions when the field is changed. For a requisition, identify the field changes that create change tracked records, reapproved by the Approval Framework, and creation of a change request. For a purchase order, identify the field changes that create change tracked records and re-approved by the Approval Framework.
<u>eProcurement Business Unit Options Page</u>	PV_BUS_UNIT_PM	Define business unit options for PeopleSoft eProcurement.
“Req Change Options (requisition change options) Page” (PeopleSoft Purchasing)	BUS_UNIT_REQ_APPR	Define requisition approval requirements for each business unit.
Register Transactions	EOAW_TXN	Register an application with the approval framework.
Configure Transactions	EOAW_TXN_NOTIFY	Use the Configuration Transactions page to configure how the system uses the particular implementation of approval triggers.
Service Operations-General	IB_SERVICE	Click the Active check box for the PV_EMAIL_REQ_APPROVAL service operation.
Setup Process Definitions	EOAW_PRCs_MAIN	Define workflow approval process stages.
Approval Authorization	EOAW_AUTH	Authorize roles and approvers for dynamic paths.

Page Name	Definition Name	Usage
Approval Monitor Configuration	EOAW_MONDIS_CONFIG	Configure the approval monitor.
Monitor Approvals	EOAW_ADM_MON_SRC	View all approvals to which you have access, as well as take necessary actions on pending approvals.
Generic Template Definition	WL_TEMPLATE_GEN	Use the Generic Template Definition page to establish a common format for all ad hoc notifications.
Event Types	EOAW_NEM_EVENTS	Associate events to a server.
Setup Event	EOAW_NEM_SETUP	Set up an escalation event and define the evaluation and action details.
Event Status	EOAW_NEM_STATUS	Check status of notification.
Schedule JobSet Definitions	SCHDLDEFN	Set up a NEM to define the job to run and how often to run it.
Register Worklist for Activity Monitor	PV_WL_REGISTRY	Register the business process name, activity name, and work list name with the activity monitor.
<u>Setting Up Installation Options for Fluid eProcurement</u>	PV_INSTALLATION_PV	Set up PeopleSoft eProcurement installation options including the maximum number of requisition lines to be displayed at one time in the Review/Edit Approvers section of the workflow approval components. Access to this page is limited to users with the SYSTEM_ADMIN action role.

Set Up the User Profile Component

For users with PeopleSoft eProcurement:

- Use the User Profile-Workflow page to identify the supervisor who should approve the user's new requisitions or purchase orders.
- Use the User Profile-Roles page to enter the roles of the user. A role is a class of users who perform the same type of work, such as an eProcurement requestor, buyer, or manager. A role describes how people fit into workflow. Roles are defined under PeopleTools, Security, Permissions & Roles, Roles.

See “Defining Users for Approval Framework” (Approval Framework)

Define User Lists

Use the User List Definition page to define lists of users who can approve transactions. Your list of approvers can be defined as a particular user role, SQL definition, PeopleSoft Query, or Application Class. These lists are used with steps in the approval process. The PeopleSoft product delivers a set of default SQL definitions and default user list roles.

See “Defining Users for Approval Framework” (Approval Framework).

Assign eProcurement Role Actions to the Appropriate User Roles

PeopleSoft eProcurement comes with several predefined role actions that restrict or grant user access to certain actions. Use the eProcurement Role Actions page to assign role actions to specific user roles. The following role actions can enable approval features for requisitions:

- *ALLOWHOLD*: Displays the Hold button on requisition approval pages. Users are allowed to put a requisition on hold.
- *ALLOW_ADHOC_ONSUBMIT*: Allows for adding or removing ad hoc approvers after you submit the requisition.
- *ALLOW_ADHOC_ONPREVW*: Enables users to add or remove ad hoc approvers on requisition preview.
- *CANCHANGEALL*: Enables a requester to change any field on the requisition without restarting the approval process while the requisition is in a pending approved status.
- *CANCHANGEDISTRIB*: Enables the requester to change any field on the requisition distribution without restarting the approval process while the requisition is in a pending approved status.
- *CANCHANGEHEADER*: Enables the requester to change any field on the requisition header without restarting the approval process while the requisition is in a pending approved status.
- *CANCHANGELINE*: Enables the requester to change any field on the requisition line, with the exception of quantity and price, without restarting the approval process while the requisition is in a pending approved status.
- *CANCHANGESCHEDULE*: Enables the requester to change any field on the requisition schedule without restarting the approval process while the requisition is in a pending approved status.
- *MASS_APPROVER*: Enables a requester to approve multiple requisitions at one time. The Approve Requisitions component is where the actions are enabled.
- *WF_EXPAND_APPROVER*: Enables users to always see the **Review/Edit Approvers** section in the eProcurement Approval page when it is expanded.

See [Maintaining System Users and Roles](#).

Create Change Templates

Define change templates for requisitions to identify when a change to a requisition field should initiate the reapproval of the requisition by the Approval Framework. To create a change template for requisitions, use the change template type of Requisition. When you first create the change template, the system

supplies the default approval workflow trigger for the following fields in both the REQ_LINE and REQ_LINE_SHIP records:

1. MERCHANDISE_AMT
2. PRICE_REQ
3. QTY_REQ

Once you have created the change template for requisitions, attach the template to the Purchasing business unit using the Purchasing Definition-Req Change Options page. The change template entered in this page is shared by the same business unit across the PeopleSoft Purchasing, eProcurement, and Services Procurement applications. If no requisition change template is defined for the business unit, then any field changes start the re-approval of the requisition line using the approval framework feature.

See “Creating Change Templates” (PeopleSoft Source to Settle Common Information).

See “Establishing Change Options and Approval Rules” (PeopleSoft Purchasing).

Review the Approval Transaction Registry

The Approval Transaction Registry is the interface application used to register an application with the approval framework. You use the Register Transactions page to link the components, event handler, records, and classes that you created to the approval process for an application transaction, such as a requisition. The main records and components that make up the transaction are registered, along with the approval transaction on which to base the approval process definition.

Any PeopleSoft-delivered approvals already have the Approval Transaction Registry populated. No additional configuration is typically needed. This includes the transaction registry for requisition approval (process ID Requisition).

The transaction registry with the process ID of Requisition uses the cross-reference table PV_REQ_AW and the default approval component of PV_REQ_APPROVAL. Note that a changed requisition uses the same workflow setup as the original requisition; it is a reapproval of the requisition. PeopleSoft Purchasing and PeopleSoft eProcurement share the same setup data, even though the objects begin with PV.

See “Setting Up the Transaction Registry” (Approval Framework)

Configure the Approval Transactions

Use the Configure Transactions page to select and define elements that determine what triggers a notification, who receives the notification, and the content of the notification. Notifications are mapped to work with the approval transaction registry and include menus and components and SQL definitions.

For the process ID of Requisition, use the approval component of PV_REQ_APPROVAL.

See “Configure Transactions Page” (Approval Framework).

Set Up Process Definitions

Use the Setup Process Definition component to define an approval definition process. This definition is made up of the stages, paths, steps, and criteria that build a workflow.

See “Defining the Setup Process Definitions Component” (Approval Framework).

Authorize Approvers and Roles for Dynamic Approval

PeopleSoft applications use workflow to configure approval paths in two manners. The first configuration is to define every approval in step-by-step fashion. The second manner is to create dynamic approvals. Use the Approval Authorization component to authorize roles and approvers for dynamic paths.

See “Defining Dynamic Approvals” (Approval Framework)

Set Up the Approval User Monitor

The approval monitor gives administrators a view into all approvals to which they have access, as well as the ability to take necessary actions on pending approvals. Each process ID can be configured using the Approval Monitor Configuration page (eProcurement, Administer Procurement, Maintain Workflow, Monitor Configuration).

Once configured, the Monitor Approvals page can be accessed from eProcurement, Administer Procurement, Maintain Workflow, Monitor Approvals.

See “Using the Approval Monitor” (Approval Framework)

See [Setting Up Event Notifications and Escalations](#).

Define Ad Hoc Notification Templates

Use the Generic Template Definition page to establish a common format for all ad hoc notifications. This provides functionality that is similar to the Approval Monitor but not limited to the administrators.

Add templates for:

- Req Approval Reminder
- Req Approval Reminder Line

See “Defining Notification Templates for Approval Framework” (Approval Framework)

Set Up Email Approvals for PeopleSoft eProcurement

The email collaboration feature enables applications to send, receive, and process emails with interactive content. You can use it to send email approvals for requisitions. You can send an HTML form to a user, and that user does not need to log in to his or her system to perform tasks.

See [Set Up Email Approvals for PeopleSoft eProcurement](#).

Set Up the Notification and Escalation Manager

The Notification and Escalation Manager (NEM) is a mechanism used to process notifications and escalations on a specified interval. For example, escalations are used when an approver has not responded within a specified time period to a transaction that is pending approval. You can specify the time period (timeout) and you can specify alternate approvers to notify and to whom to escalate the approval for further action. Timeout options are defined on the Approval Path Definition page.

To set up the NEM, use the following pages: Event Types, Setup Event, Event Status, and Schedule JobSet Definitions.

See “Understanding Notification and Escalation Manager” (Approval Framework)

Register Worklists with the Activity Monitor

Use the Register Worklist for Activity Monitor page to register the business process name, activity name, and work list name with the activity monitor.

Determine the Maximum Rows for the Approval Monitor and Other Pages

On the eProcurement Installation Options page, enter the maximum number of requisition lines to be displayed at one time in the Review/Edit Approvers section of the workflow approval components. You can access additional lines by using the chunking options at the top of the section, including using the **Next Item** button or **Last Item** button, or entering a range of requisition lines and clicking the **Retrieve** button. The default for this field is 5.

See [Determine the Maximum Rows for the Approval Monitor and Other Pages](#).

Activate Workflow

Activate the approval framework for requisitions by using the:

- Purchasing Definition-Req Change Options page. Use the Purchasing business unit to enable the Approval Framework for requisitions in both PeopleSoft Purchasing and PeopleSoft eProcurement. Select the **Workflow Approval Required** check box to enable requisition approval within the business unit. Select this check box to replace the PeopleTools workflow technology (virtual approver) in PeopleSoft Purchasing with the Approval Framework. If you enable the Approval Framework for the Purchasing business unit, then it is enabled for eProcurement also. The **Change Template** entered on this page is used by PeopleSoft Purchasing, eProcurement, and Services Procurement to determine which field changes to the original requisition will launch the approval framework for requisition reapproval. Select the **Resubmit Workflow for Quantity and Price Decrease** check box to require approval of a requisition change with a decrease in item quantity or price.

See “Establishing Change Options and Approval Rules” (PeopleSoft Purchasing).

- eProcurement Business Unit Options page. Select the **Workflow Approval Required** check box to enable requisition approval within the eProcurement business unit. Select the **Resubmit Workflow for Quantity and Price Decrease** check box to require reapproval of a requisition with a decrease in item quantity or price. If the **Workflow Approval Required** check box is selected on the PeopleSoft Purchasing business unit, then the Approval Framework is enabled for both Purchasing and eProcurement and this check box on this page is unavailable. Selecting the **Workflow Approval Required** check box on the eProcurement business unit but not the Purchasing business unit enables the Approval Framework only in PeopleSoft eProcurement; in this case, if you edit an eProcurement requisition within a Purchasing component, then the virtual approver is used instead of the approval framework. Note that a requisition added in PeopleSoft eProcurement (that is, having a SYSTEM_SOURCE of EPO) can be changed by means of the PeopleSoft Purchasing components only if you have selected the **Allow Req Change in Purchasing** check box on this page (eProcurement Business Unit Options page). When approval framework is used in PeopleSoft

Purchasing, a requisition added in PeopleSoft Purchasing cannot be altered by means of the PeopleSoft eProcurement components.

See [eProcurement Business Unit Options Page](#).

Maintain Workflow Page

Use the Maintain Workflow page (PV_ADM_WORKFLOW) to access many of the pages and components that you use to set up the Approval Framework for PeopleSoft eProcurement.

Access to this page is limited to users with the SYSTEM_ADMIN action role.

Navigation:

eProcurement > Administer Procurement > Maintain Workflow

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

Maintain Workflow		Workflow Setup Guide
Menu	Description	
Set Supervisors	Enter the supervisors for each of your requesters for amount approval	
Workflow Roles	Attach workflow roles to your users.	
User List Setup	Setup Lists of Users for Approvals	
Email Notification Templates	Generic Email Notification Templates	
Transaction Registry	Register Transactions	
Transaction Configuration	Configure Transactions	
Approval Process Setup	Setup Approval Processes for Application Transactions	
Approval Authorization	Approval Authorization	
Monitor Approvals	Monitor Approvals	
Event Types	Notification and Event Manager Event Type Server Association	
Event Definition	Notification and Event Manager Event Configuration	
Event Status	Notification and Event Manager Run Status	
Schedule Notification Job	Schedule workflow notification job.	
Activity Monitor Registry	Register Worklists for Activity Monitor	
Archive Viewer	Archive Viewer	
Return to Administer Procurement		

Use the Maintain Workflow page to gain easy access to many of the pages needed to set up the requisition approval process within PeopleSoft eProcurement. For more information about these pages, see the beginning of this section.

PeopleSoft Approval Framework

Setting Up Email Approvals for PeopleSoft eProcurement

The email collaboration feature enables applications to send, receive, and process emails with interactive content. You can use it to send email approvals for requisitions. You can send an HTML form to a user, and that user does not need to log in to his or her system to perform tasks.

These steps describe the flow of email collaboration:

1. A system event triggers PeopleSoft PeopleCode, which creates a collaborative email and sends it to a user.
2. The user who receives the email takes appropriate action and clicks **Submit**.
3. The user's submission is sent to an email account that is designated for holding responses.
4. An application engine program runs on a configured interval, polling the repository for new emails. It processes the emails and publishes them as service operation messages.
5. The service operation runs, enabling the implementing application to process the data in a known and supported format.

To set up email approvals:

1. On the Register Transactions page, complete the Notification Options section to include email notifications. Be sure to select the Use Email Approvals check box. Update the Register Transactions page for the process ID of *Requisition*.

See “Setting Up the Transaction Registry” (Approval Framework)

2. On the Configure Transactions page, complete the Notification Options section. Select the Sent Email Approvals to All check box or add a user list in the **Email Approval User List** field. Update the Configure Transactions page for the process ID of *Requisition*.

See “Configuring Approval Transactions” (Approval Framework)

3. Design the format of the email to be sent using the Form Element Designer page, Form Layout Designer page, and Field Mapping page within the Email Collaboration menu (Enterprise Components, Approvals, Email Collaboration). For directions, see “Triggering Email Collaboration” (Approval Framework)
4. Use the Node Properties page to modify the PSFT_EMG_GETMAIL node to enable email collaboration. For directions, see “Triggering Email Collaboration” (Approval Framework)
5. Set up the Requisition Approval (PV_EMAIL_REQ_APPROVAL) service operation within PeopleSoft Integration Broker and Enterprise Components. For directions in activating a service operation, see “Setting Up Service Operations” (PeopleSoft Supply Chain Management Integration)

- Schedule the PeopleSoft Application Engine program EOAWEMC to run on a regular basis. For directions, see “Triggering Email Collaboration” (Approval Framework)

PeopleSoft delivers service operations in PeopleSoft Integration Broker with a default status of *Inactive*. You must activate each service operation before attempting to send or receive data from a third-party source. Use the information in this table and refer to the setup instructions in “Setting Up Service Operations” (PeopleSoft Supply Chain Management Integration)

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
PV_EMAIL_REQ_APPROVAL	Inbound Asynchronous	EmailSubscription	No	External XML

PeopleTools: Integration Broker

Related Links

“Setting Up Service Operations” (PeopleSoft Supply Chain Management Integration)

Determining the Maximum Requisition Lines to Display

Use the eProcurement Installation Options page (PV_INSTALLATION_PV) to set up PeopleSoft eProcurement installation options including the maximum number of requisition lines to be displayed at one time in the Review/Edit Approvers section of the workflow approval components.

Access to this page is limited to users with the SYSTEM_ADMIN action role.

Navigation:

eProcurement > Administer Procurement > Maintain Overall System Options > eProcurement Installation Options

Chunking displays the requisition lines in groups to make large requisition more manageable. On the eProcurement Installation Options page, use the following fields to set up requisition line chunking for the approval framework:

Field or Control	Description
Approval Monitor	Enter the maximum number of requisition lines to be displayed at one time (chunking) in the Review/Edit Approvers section of the workflow approval components and in the Confirmation page of the Create Requisition component. The default for this field is 5.
Display Approval Chunking	Select this check box to enable chunking on the Review/Edit Approvers section of the workflow approval components and on the Confirmation page of the Create Requisition component. This check box only impacts line level approvals.

For additional information about eProcurement Installation Options see [Setting Up Installation Options for Fluid eProcurement](#).

On the Requisition Approval page (**eProcurement > Manage Requisition Approvals**, click the Requisition ID link), you can access additional lines by using the chunking options at the top of the Review/Edit Approvers section. You can:

- Use the Requisition Line(s) and the To field to enter a range of lines to view within the Review/Edit Approvers group box, then click the **Retrieve** button.
- Use the **First Item**, **Previous Item**, **Next Item**, or **Last Item** button to move between chunks.

This example illustrates the fields and controls on the The Review/Edit Approvers section of the Requisition Approval page (partial page).

The screenshot displays the 'Review/Edit Approvers' interface. At the top, there's a header bar with the title 'Review/Edit Approvers'. Below it, a search area labeled 'Requisition Line(s):' contains input fields for '1' and 'To 5 of 8', along with navigation icons and a 'Retrieve' button. The main section is titled 'Commodity/Category Approval' and shows 'Line 1: Pending' for 'Jab Saw'. A 'Start New Path' button is visible. The approval flow is shown as 'Route to Hardware Approver' leading to a 'Pending' state (Multiple Approvers Hardware Buyer) which then leads to a 'Not Routed' state (Anita Gardner Inserted Approver).

See [Setting Up Installation Options](#).

Performing Approval Tasks for Requisitions

This section discusses how to:

- Search for requisitions requiring approval.
- Perform eProcurement requisition line approval tasks.
- View details about requisition line items.

Pages Used to Perform Approval Tasks for Requisitions

Page Name	Definition Name	Usage
Manage Requisition Approvals Page	PV_APP_MAN_PG	View and take action on requisitions that require your approval or requisitions that previously required your approval.

Page Name	Definition Name	Usage
<u>Requisition Approval Page</u>	PV_REQ_APPROVAL	Perform approval tasks on one individual requisition. You can view requisition details, enter comments, view header and line comments and attachments, add ad hoc approvers and reviewer, as well as approve, deny, or hold a requisition line.
<u>Requisition Line Details Page</u>	None	View details about requisition line items including comments and attachments.

Understanding Approval Tasks for Requisitions

Use the Approve Requisitions component to perform a number of approval tasks, including:

- Approving a requisition or requisition line. You can approve the entire requisition at the header level or approve individual lines at the line level.
- Performing mass approvals. Using the Manage Requisition Approvals page, you can select multiple requisitions to be approved or denied at one time. Use the Mark All icons to perform mass approval. The Mark All icons do not appear unless the user has the eProcurement role action of *MASS_APPROVER* attached to his user role.

In addition, the Integration Broker Service Operation *EOAW_APPROVALS* and its Handler has to be Active and Queue Name *EOAW_APPROVALS* also has to be in Queue Status of *Run* for Mass Approvals to work.

- Denying a requisition or requisition line. You can deny some lines of the requisition and approve others, making line-level approvals independent for each line. Once a requisition or requisition line is denied, the workflow stops.
- Holding a requisition or requisition line. This action gives the approver time to research an issue and prevents the approval process from going to the next approval step until the approver takes action on the requisition or requisition line. When an approver uses the hold action, the system inserts the requisition's originator (i.e. requester) as an ad hoc reviewer at the current approval step and the approver can add a comment requesting more information from the requester.

If multiple approvers are required in this one approval step in the approval framework, then the other approvers of the same step can approve or deny the requisition or requisition line; however, the approval process does not move to the next approval step until the hold is removed by the approver who entered it. The hold option does not display unless the user has the eProcurement role action of *ALLOWHOLD* attached to his user role.

- Pushing back a requisition or requisition line. A push back returns the transaction to the previous approval step. The meaning of *push back* is that the approver is questioning the prior step's approval and is requesting clarification.

Pushback button is only displayed on the second and subsequent levels of approvers for a requisition or requisition line. For example, consider the requisition submitted for approvals requiring Approver 1 to approve first and Approver 2 to approve last. When the first approver receives the requisition workflow approval routing, Push Back action is not available for the first approver. Only after the

first approver has approved the requisition and routed to the second approver, Push Back button is available for selection for the second approver.

- Adding or removing ad hoc approvers or reviewers. During the approval process, approvers can add other approvers or reviewers to the current or a later stage of the approval process. For example, if a buyer wants input from an inventory analyst, she can add the analyst as an approver. This action is called ad hoc approval, and it applies only to the approval instance in which the addition occurs and does not affect the underlying process definition used for other requests.

The ability to add or remove ad hoc approvers depends on whether the user has been assigned the eProcurement role actions `ALLOW_ADHOC_ONPREVW` and `ALLOW_ADHOC_ONSUBMIT`.

- Reviewing an online requisition that shows the layout of the printed version. The requisition opens up as a second window and can be printed. The Oracle BI Publisher is used to generate this report, and you can customize it.
- Making comments to be viewed by other approvers or reviewers.
- Approving a requisition that has been changed. When a requisition is changed during or after the approval process, the Approval Framework can require re-approval of the changes using the same approval component as the original requisition.

Approving, Denying, or Holding a Requisition

A requisition can be approved, denied, or put on hold at the header or line level. The Manage Requisition Approvals component enables you to:

- Approve, deny, or hold multiple requisitions at one time using the mass approval feature on the Manage Requisition Approvals page.
- Approve, deny, or hold requisitions at the header level using the Manage Requisition Approvals page.
- Approve, deny, or hold requisition lines using the Manage Requisition Approvals page.
- Approve, deny, or hold requisition lines using the Requisition Approval page where you can view more details and add ad hoc approver and reviewers.

To approve, deny, or hold multiple requisitions using the mass approval feature:

1. Go to the Manage Requisition Approvals page.
2. Select the Approve, Deny, or Hold button on the Mark All row. All displayed requisitions are marked with this action in the Action/Status field.
3. Change the Action/Status field for any requisitions that you do not want included in the mass approval action.
4. Click the Submit button.

This example illustrates the fields and controls on the Manage Requisition Approvals page.

Manage Requisition Approvals

Search Requisitions

To locate requisitions that require your approval (or requisitions that previously required your approval), edit the criteria below and click the Search button.

Requisition ID

Requisition Name

Business Unit

*Status

Date From

Date To

Requester

Entered by

[Show Advanced Search](#)

Requisitions

To approve or deny one or more pending requisitions, select the appropriate action from the dropdown and click submit. To view the complete details of a requisition, click the Requisition ID link.

[Expand All](#) [Collapse All](#)

Action/Status	Req ID	Requisition Name	Bus. Unit	Date	Requester	Entered By	Total
Pending	0000000003	Bike-A-Thon	US003	10/29/2014	Calvin Roth	Kenneth Schumacher	1750.00 USD
Pending	0000000005	0000000005	US003	10/29/2014	Calvin Roth	Kenneth Schumacher	675.00 USD

Mark All: [Approve](#) [Deny](#) [Hold](#)

To approve, deny, or hold requisitions (header level) using the Manage Requisition Approvals page:

1. Identify a requisition that is in pending status.
2. Select the *Approve*, *Deny*, or *Hold* option in the Action/Status field.
3. Click the Submit button at the bottom of the page.
4. To *Approve*, *Deny*, or *Hold* all the pending requisitions, select from Mark All: *Approve*, *Deny*, or *Hold* one of the actions.

To approve, deny, or hold requisition lines using the Requisition Approval page:

1. On the Manage Requisition Approvals page, select the Requisition ID link to access the Requisition Approval page. This page displays the lines within one requisition that are pending an approval action.
2. In the Line Information group box, select one or more requisition lines by selecting the check box next to the line. You can also use the Select All option. You can only take action on lines that are in the pending status.
3. Enter comments in the Comment section at the bottom of the page. A comment is required before you can deny, push back or hold a requisition line. Only one comment is allowed per save.
4. You can view the Header comments and attachments by clicking the *Header Comments* link.
5. Click the **Approve**, **Deny**, or **Hold** button.

This example illustrates the fields and controls on the Requisition Approval page.

Requisition Approval

Business Unit US001
 Requisition ID 0000000172
 Requisition Name 0000000172
 Requester [Kenneth Schumacher](#)
 Entered on 07/18/2019
 Status Pending
 Priority Medium
 Budget Status Not Checked

Currency ☒ Approver ☐ Requester
 Total Amount 7,470.01 FRF

Requester's Justification
 COMMENTS TEST

[Edit Requisition](#) [View printable version](#)

▼ **Line Information** ?

Line Information

☐ ☐ 1-1 of 1

Line	Item Description	Supplier Name	Quantity	UOM	Price	
1	TEST		1.0000	EA	7470.00673	FRF

☐ Select All / Deselect All
[View Line Details](#)

► **Review/Edit Approvers**
 Enter Approver Comments

☐ ☐ ☐

[Approve](#) [Deny](#)

Note: If commitment control is activated for approvals in PeopleSoft eProcurement, then you must add a row to the Source Transactions component. From the Source Transactions component, select the source transaction type of *REQ_PREENC* and click the Selection Criteria tab. Add a row with a **Field Name** of *REQ_STATUS*, and a **Field Value** of *LA*.

Pushing Back Requisitions

To push back a requisition line, access the Requisition Approval page and:

- Select a line that is pending the approval.
- Enter comments in the Enter Approver Comments section. This is required before you push back the requisition.
- Click the Pushback button in the Line Information section. To push back the entire requisition, use the Pushback button under the Enter Approve Comments section.

Note: Requisition line approval appears as the Pushback button at the Line Information section. Only for second or subsequent levels of approvers Pushback button is available in the Line Information section.

Insert Ad Hoc Approvers

To insert ad hoc approvers and reviewers, go to the Requisition Approval page and click the plus + icon for a pending requisition line. The Insert additional approver or reviewer window appears for you to select the user ID and to indicate whether the person is an ad hoc approver or reviewer for this line.

You cannot change ad hoc approvers or reviewers; however, you can delete and add them again to indicate whether they are approvers or reviewers. To delete an approver or reviewer, click the minus – icon. To add multiple approvers or reviewers, click + at the point where you want the additional approver or reviewer to receive the approval.

For you to add ad hoc approvers and reviewers:

- The user must be linked to a user role included in the eProcurement role action of ALLOW_ADHOC_ONPREVW. This eProcurement role action allows the user to add or remove ad hoc approvers while reviewing the requisition. In addition, you can use the ePro role action of ALLOW_ADHOC_ONSUBMIT to enable a user to add or remove ad hoc approvers when entering a new requisition.
- Use the **Ad Hoc User List** field on the Configure Transactions page to limit the users that can be added as ad hoc approvers and reviewers. If this field is left blank, then any active user can be added as an ad hoc approver or reviewer.

When you click the + icon on the Review/Edit Approvers section of the Requisition Approval page, the following window appears:

This example illustrates the fields and controls on the Insert additional approver or reviewer page.

This example illustrates the fields and controls on the Review/Edit Approvals section after an ad hoc approver has been added (partial page).

Approving Requisition After Editing

When there are many requisitions submitted for approval and after the approval if one of the requisition line is edited and again submitted for approval then only that particular requisition line will be processed. This is taken care by the user entered criteria REQ_LINE.APPR_REQ in the Criteria Definition page whose value if equals Y, submits only the edited requisition line for approval and not all the lines. This

criterion has to be defined for the path and it is applicable only for line level approvals and not for header level approvals.

This example illustrates the fields and controls on the Manage Requisitions page.

Manage Requisitions

Requisition Search | Keyword Search

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit Requisition Name

Requisition ID Request State Budget Status

Date From Date To

Requester Entered By PO ID

[Show Advanced Search](#)

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total
0000000164	0000000164	US001	07/27/2016	Approved	Not Chk'd	125.00 USD

Requester: Kenneth Schumacher
Pre-Encumbrance Balance: 0.00 USD
Entered By: Kenneth Schumacher
Priority: Medium

Requisition Lifespan:

Line Information

Line	Description	Status	Price	Quantity	UOM	Supplier
1	25 inch Desktop LCD Monitor,...	Approved	125.00000	1.0000	EA	Midton Computer Supplies

0000000150 Emergency Room US001 11/13/2014 Approved Valid 4,802.50 USD [Select Action] Go

This example illustrates the fields and controls on the Approval Status page.

Approval Status

Business Unit US001
Requisition ID 0000000164
Requisition Name 0000000164
Requester Kenneth Schumacher
Entered on 07/27/2016
Status Approved
Priority Medium
Budget Status Not Checked

Total Amount 125.00 USD

Requester's Justification
No justification entered by requester.

[Header Comments](#) [View printable version](#)

Line Information ?

Line Information

Line	Item Description	Supplier Name	Quantity	UOM	Price	Requester's Comments
1	25 inch Desktop LCD Monitor,...	MIDTON-001	1.0000	EA	125.00000	

☐ Select All / Deselect All

Manage Requisition Approvals Page

Use the Manage Requisition Approvals page (PV_APP_MAN_PG) to view and take action on requisitions that require your approval or requisitions that previously required your approval.

Navigation:

eProcurement > Manage Requisition Approvals

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

Manage Requisition Approvals

Search Requisitions

To locate requisitions that require your approval (or requisitions that previously required your approval), edit the criteria below and click the Search button.

Requisition ID

Requisition Name

Business Unit

*Status Pending

Date From

Date To

Requester

Entered by

Search

Clear

Show Advanced Search

Requisitions

To approve or deny one or more pending requisitions, select the appropriate action from the dropdown and click submit. To view the complete details of a requisition, click the Requisition ID link.

Expand All

Collapse All

Action/Status	Req ID	Requisition Name	Bus. Unit	Date	Requester	Entered By	Total
Pending	0000000061	0000000061	US100	02/08/2013	Kelly Jones	Kelly Jones	932.21 USD
Pending	0000000064	0000000064	US100	02/13/2013	Kelly Jones	Kelly Jones	701.55 USD
Pending	0000000065	0000000065	US100	02/13/2013	Kelly Jones	Kelly Jones	4,116.22 USD

Mark All:

Approve

Deny

Hold

Submit

The Manage Requisition Approvals page enables you to view and take action on requisitions that require your approval or view requisitions that previously required your approval.

Use the Search Requisitions group box to search for requisitions needing your approval. Requisitions displayed are based on the user ID of the person accessing this page. You can limit the scope and number of requisitions that appear on the page. For example, you can limit the search results to a specific business unit, requester, or approval status. After displaying the requisitions, you can select individual requisitions to review and update.

Field or Control	Description
Requisition ID	Select the specific system-assigned identifier of the requisition that you want to review or maintain. This limits the search results to one specific requisition.
Requisition Name	Select the name of a specific requisition that you want to view or maintain. This is the name the requester assigned to the requisition. If a name was not assigned, the system uses the requisition ID as the name. This limits the search results to one specific requisition.
Business Unit	Select a business unit containing the requisitions that you want to review for approval.

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Field or Control	Description
Status	Select the status of the requisitions that you want to review for approval. Requisitions that appear in the search results are those in the status that you select and that meet the other search criteria that you enter. Status values are: <i>Approved:</i> Displays all requisitions that you have approved. <i>Denied:</i> Displays all requisitions that you have denied. <i>On Hold:</i> Displays all requisitions that you have placed on hold. <i>Pending:</i> Displays all requisitions that are waiting for your action. <i>Pushedback:</i> Displays all requisitions you have pushed back to the previous approver.
Date From and Date To	Select a range of dates to select requisitions to view.
Requester	Select the user who entered the requisitions.
Entered by	Select an operator for whom you want to manage requisitions. Operators are people who have created requisitions for someone else. Only the requisitions submitted by this operator appear in the list.
Show Advanced Search	Click to display additional search criteria to locate requisitions. Additional fields are Item/Job Title (for item description or job title) and Supplier ID .
Search	Click the Search button to initiate your search.
Clear	Click the Search button to erase your current search criteria in the Search Requisitions group box.
	Click the Expand All icon to display requisition detail including line and header-level information.
	Indicates that lines are pending approval for the requisition.
Req ID (requisition ID)	Click to access the Requisition Approval page, where you can perform approval tasks, such as approve, deny, or hold. In addition, you can add comments and add ad hoc approvers and reviewers.
	Indicates that the requisition has a high priority. Priorities are assigned when the requisition is created or edited.

Field or Control	Description
	Indicates that a specific header or line is pending approval.
Mark All	Use the Mark All row to perform a mass approval or mass denial of several requisitions at one time. The Mark All row does not appear unless the user has the eProcurement role action <i>MASS_APPROVER</i> attached to his user role. - Click Approve to mark all displayed requisitions as <i>Approve</i> in the Action/Status field. You must save (submit) the page to perform this mass approval. - Click Deny to mark all displayed requisitions as <i>Deny</i> in the Action/Status field. You must save (submit) the page to perform this mass denial. - Click Hold to mark all displayed requisitions as <i>Hold</i> in the Action/Status field. You must save (submit) the page to perform this action. Within the PeopleSoft Purchasing application, if a user has the authority to access the Manage Requisition Approvals component, then mass approval is allowed regardless of the eProcurement role action. Integration Broker Service Operation <i>EOAW_APPROVALS</i> and its Handler has to be Active and Queue Name <i>EOAW_APPROVALS</i> also has to be in Queue Status of <i>Run</i> for Mass Approvals to work
Create New Requisition	Click to access the Create Requisition page, where you can create a new requisition.
Manage Requisitions	Click to access the Manage Requisitions page, where you can work with requisition details.

Requisition Approval Page

Use the Requisition Approvals page (PV_REQ_APPROVAL) to view the requisition approval details for the selected requisition.

Navigation:

eProcurement > **Manage Requisition Approvals**. Select a Requisition ID

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

Requisition Approval

Business Unit US001
 Requisition ID 0000000172
 Requisition Name 0000000172
 Requester [Kenneth Schumacher](#)
 Entered on 07/18/2019
 Status Pending
 Priority Medium
 Budget Status Not Checked

Currency ☒ Approver ☐ Requester

Total Amount 7,470.01 FRF

Requester's Justification
 COMMENTS TEST

[Edit Requisition](#) [View printable version](#)

▼ **Line Information** ?

Line Information

1-1 of 1

Line	Item Description	Supplier Name	Quantity	UOM	Price	
1	TEST		1.0000	EA	7470.00673	FRF

☐ Select All / Deselect All

[View Line Details](#)

► **Review/Edit Approvers**

Enter Approver Comments

[Approve](#) [Deny](#)

This example illustrates the fields and controls on the Requisition Header Comments and Attachments page.

Requisition Header Comments and Attachments

Business Unit US003 Requisition ID 0000000005

Header Details

▼ **Comment 1**

Test Header Comments 1 Without Attachments

▼ **Comment 2**

Test Header Comments 2 With Attachment

Sequence	Attached File
1	Additional_Details.pdf

[Return](#)

Use the Requisition Approval page to perform your approval tasks, including:

- Approving one or more requisition lines. The line-level approval can be used only if the process ID is configured for line-level approval on the Register Transactions page and Approval Process Setup page.
- Denying one or more requisition lines.

- Placing one or more requisition lines on hold. This action inserts the requester as an ad hoc reviewer and requires you to enter comments to be sent to the requester.
- Pushing back one or more requisition lines. A push back returns the line to the previous approval step.
- Adding or removing ad hoc approvers or reviewers.
- Making comments to be viewed by other approvers or reviewers.
- Viewing header comments and attachments.

The page displays details about the requisition, such as the requester, the date it was entered, the requisition name and ID, and the requisition priority. Also appearing is the total monetary value of the requisition and the currency used.

Note: If you select a line that does not require action, you receive a message telling you to select a line that is pending an approval.

When Display Approval Chunking check box is selected and the Max Rows to Retrieve For: Approval Monitor field is set to a particular value on the eProcurement Installation Options page, and there are more requisition lines to be approved than the value entered in the Approval Monitor field page, the system displays the approval chunking icons and the individual requisition lines pending for approval under Review/Edit Approvers section on the Requisition Approval page. This only impacts line level requisition workflow approval.

The number of lines that are displayed on this page is determined by the Display Approval Chunking check box and the Max Rows to Retrieve For: Approval Monitor field on the eProcurement Installation Options page.

Field or Control	Description
Requester	Click to access the Requester Information page. This page displays details about who created the requisition, including the requester's supervisor and reporting structure, department, email ID, and telephone number. You can change the information displayed by modifying the approver information view that is registered on the Register Transactions page.
Requester's Justification	Displays any comments that the requester entered to justify the need for the requisition.
Edit Requisition	Click to access the Edit Requisition component, where you can change the requisition. Once you have made your changes and saved the requisition, you can use the Return to Approve Requisition link on the Confirmation page to return to this page as long as the approval workflow process is not restarted by your change. To make changes to the requisition without reinitiating workflow, your user ID must be linked to the appropriate eProcurement role action; these actions include, CANCHANGALL, CANCHANGEHEADER, CANCHANGELINE, CANCHANGESCHEDULE, and CANCHANGEDISTRIB.

Field or Control	Description
Header Comments	Click to view the header comments and attachments.
View printable requisition	Click to review an online requisition that shows the layout of the printed version. The requisition opens up as a second window and can be printed. The Oracle BI Publisher is used to generate this report, and you can customize it.

Line Information

Use this section of the Requisition Approval page to review requisition line details and perform approval tasks. Line items that are awaiting approval are highlighted and selected as default values when you access the page.

This example illustrates the fields and controls on the Requisition Line Comments and Attachments page. You can find definitions for the fields and controls later on this page.

Requisition Line Comments and Attachments

Business Unit US003 Requisition ID 0000000005

Line 1 Item Description Calculator, Electric

▼ **Comment 1**

Test Line Comments 1 with 1 Attachment

Sequence	Attached File
1	 Laptop.JPG

▼ **Comment 2**

Test Line Comments 2 Without Attachments

▼ **Comment 3**

Sequence	Attached File
1	 Order_Details.txt

Field or Control	Description
	The Awaiting Approval icon appears with a requisition line to indicate that the line is pending approval.
Item Description	Click to view details about an item contained on a requisition. As you review approvals, you can see the item details and an image of the item.
Substitute Item In Use	Select to display all the related substitute items

Field or Control	Description
Requester's Comments	Click to view line comments and attachments.
Select All/Deselect All	Select this check box to select all line item check boxes; deselect this check box to deselect all line item check boxes. You can use this check box to approve or deny all lines or you can select individual check boxes for single approval or denials.
View Line Details	Click to access the Requisition Line Details page, where you can view details about the requisition line items that you selected.
Approve	Click to approve the selected requisition line items. When you approve a line-level or header-level item, the system routes the requisition line to the next approver and updates the approval status for the line.
Deny	Click to deny the selected requisition line items. Before the system accepts a denial, you must enter comments indicating why you did not approve the lines.
Hold	Click to put the selected requisition lines on hold. The Approver must enter a comment to place the requisition on hold. The comment is sent to the requester and the requester is added as an ad hoc reviewer to this approval step.
Pushback	Select to return a pending approval requisition to the previous approver with comments. This is possible only if a previous approver was in the same path. You cannot push back a requisition across stages.

Review/Edit Approvers

Use this section of the Requisition Approval page to review the approval flow, such as who approved the requisition before you and who will approve it after you. Click the plus + icon to insert ad hoc approvers and reviewers. If you want to remove an ad hoc approver or reviewer, click the minus — icon.

To add ad hoc approvers and reviewers:

- The user must be linked to a user role included in the eProcurement role action of ALLOW_ADHOC_ONPREVW. This eProcurement role action enables the user to add or remove ad hoc approvers while reviewing the requisition. In addition, you can use the eProcurement role

action of ALLOW_ADHOC_ONSUBMIT to enable a user to add or remove ad hoc approvers when entering a new requisition.

- All qualified ad hoc approvers or reviewers must be defined as part of the **Ad Hoc User List** on the Configure Transactions page.
- Ad hoc approvers may approve or review the transactions as per the Ad Hoc User List defined on the Configure Transactions page.

This example illustrates the fields and controls on the Configure Transactions page.

The screenshot shows the 'Configure Transactions' page. At the top, there are tabs for 'Process ID' and 'Requisition'. Below these are two main sections: 'Ad Hoc Approver Options' and 'Notification Options'.

Ad Hoc Approver Options:

- *Approval User Info View: PV_APPR_INFO_VW (with a search icon)
- Ad Hoc User List: BUYER - Pville (with a search icon)

Notification Options:

- ☐ Send Email Approvals to All
- Email Approval User List: (empty field with a search icon)
- *Delivery Method: Inline - HTML Form (dropdown menu)
- ☐ Perform Sent-To Security Check

- Based on the row level security that is applied for the user(Ad hoc Approver) on the “Security Options Page” (Application Fundamentals) and Business Unit Security by User ID page, only a selected set of authorized Ad hoc approvers can approve transactions.

<i>Field or Control</i>	<i>Description</i>
Requisition Line(s), To, and Retrieve	Use the Requisition Line(s) and the To field to enter a range of lines to view within the Review/Edit Approvers group box. These chunking fields are displayed if you have selected Display Approval Chunking check box and entered a value in the Max Rows To Retrieve for: Approval Monitor field on the eProcurement Installation Options page.

Enter Approver Comments

Use this section to enter comments about the requisition. If you deny a requisition, the system requires that you enter a comment.

Requisition Line Details Page

Use the Requisition Line Detail page to view details about requisition line items.

Navigation:

On the Requisition Approval page, select one or more lines and click the View Line Details button.

This example illustrates the fields and controls on the Line Details page.

Business Unit: US003		Requester: CROTH		Status: Pending Approval			
Requisition: 0000000005		Requested By: Calvin Roth		Currency: USD			
Requisition Name: 0000000005		Entered Date: 10/29/14		Requisition Total: 675.00			
Header Comments: Test Header Comments 1 Without Attachments Test Header Comments 2 With Attachment							
Line: 1	Item Description: Calculator, Electric	Quantity: 15.0000	UOM: EA	Price: 45.00	Line Total: 675.00		
				Line Status: Pending			
Line Comments: Test Line Comments 1 with 1 Attachment Test Line Comments 2 Without Attachments							
Ship Line: 1		Ship To: US001		Address:			
Attention: Calvin Roth		Due Date:		144 North Street			
Ship Via: COMMON		Freight Terms: DES		New York NY 10168			
				United States			
				Shipping Quantity: 15.0000			
				Shipping Total: 675.00			
Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	US001	15.0000	100.00	675.00	US001	631000
Dept							
21000							
Open QTY		Open Amt					
15.0000		0.000					
GL Base Amount		Currency	Sequence				
675.00		USD	0				

Use this page to review shipping and accounting details for line items that you selected to review using the Requisition Approval page.

Changing Requisitions and Using Change Requests

Understanding Requisition Changes and Change Requests

After submitting a requisition circumstances can change. You may need to change the original requisition, such as changing the quantity ordered, price, scheduled delivery date, or ship-to location. To change a requisition, use the Edit Requisition component. The changes are applied as follows:

- If no line of the requisition has been sourced to a purchase order, then any change you make to the requisition is used to update the requisition. If the commitment control feature is used then the system might require another budget check of the requisition. If the requisition had started or completed the approval workflow process, then the system may require the approved workflow to be restarted.
- If any line of the requisition has been sourced to a purchase order, then any change you make to the requisition is used to update the requisition and also creates a change request. The system might require the changed requisition to complete the same budget checking and approval workflow requirements as the original requisition. The change request is then picked up by the Change Purchase Order process (PO_POCHNG) and used to update the purchase order, create a change order, or create a new purchase order line.

When changing a requisition in PeopleSoft eProcurement, the system:

- Enables you to change fields on a requisition that is in the open, pending, approved, or sourced status. The field must be marked for change on the requisition change template used for this business unit. On the change template, select the Track Change check box to use the track change feature and also allow the fields to be changed on the Edit Requisition component in PeopleSoft eProcurement. However, once a requisition line has been sourced to a purchase order, the field can only be edited if the Update PO check box is also selected. The Update PO check box on the requisition change template identifies the field changes that would create a change request; for example, changing the requisition name would probably not require a change request but decreasing the item quantity would require a change request. If no requisition change template is defined for the business unit, then no change request can be created; you can increase the item quantity field resulting in a new demand line for the requisition but you cannot decrease the item quantity field.
- Enables you to cancel a requisition using the Requisition Details for: <requester> page within the Manage Requisitions component. You can cancel a requisition that has been sourced to a purchase order. If the cancellation completes budget checking and workflow approval, then the system creates a change request for cancelling the corresponding purchase order lines. A requisition line cannot be cancelled if you are using Commitment Control and the line has not yet pass budget checking.
- If commitment control is used, the system automatically runs budget checking against pre-encumbrances and encumbrances when the merchandise amount is decreased on the requisition. The merchandise amount can be reduced on a requisition when you decrease the quantity or price.

- Automatically launches any necessary approvals for the change to the requisition using the Approval Workflow Framework feature. On the change template, select the Reapprove check box for each field that requires a re-approval when changed. The following fields are selected by default and it is recommended that you keep the Reapprove check box selected on these fields: REQ_LINE.MERCHANDISE_AMT, REQ_LINE.PRICE_REQ, REQ_LINE.QTY_REQ, REQ_LINE_SHIP.MERCHANDISE_AMT, REQ_LINE_SHIP.PRICE_REQ, and REQ_LINE_SHIP.QTY_REQ. If no requisition change template is defined for the business unit, then any field changes start the re-approval of the requisition line using the approval framework feature.
- Tracks the changes made to any requisition and enables you to view the details about each change, the identity of the user who made the change, and when the change was made. One requisition could be changed multiple times and you can view each change. On the change template, select the Track Change check box for each field that requires change tracking to be recorded when the field is changed. Use the View Requisition Change Tracking History to view these tracked changes. If no requisition change template is defined for the business unit, then the change tracking feature does not record any changes.
- Enables the users to enter reason codes and comments to explain why they are changing the requisition. The reason code and comments can be required or optional. You can create reason codes that are appropriate for your business and then your users select the appropriate reason code. Reason codes using the *Procurement Change* reason type are selected by users entering a change to a requisition and change tracking.

The current status of the requisition is important when you want to change your request:

- If the requisition has not been sourced to a purchase order in PeopleSoft Purchasing, then changing the requisition results in an updated requisition.
- If the requisition has been sourced to a purchase order but not yet dispatched to the supplier, then changing the requisition results in an updated purchase order.
- If the requisition has been sourced to a purchase order and dispatched to the supplier, then changing the requisition results in the dispatch of a PO change order to the supplier.
- If the requisition has been sourced to a material stock request in PeopleSoft Inventory, then the requisition cannot be changed. You must alter the material stock request.

Rules for Changing a Requisition and Creating Change Requests

The following rules apply when working with changes to a requisition and change requests:

- The new quantity cannot be less than the received quantity.
- Distribution line information cannot be changed.
- Changes to your requisition will be removed if the buyer or requisition approver denies the change in quantity or price on the requisition.
- A change request cannot change a value where that field is tied to a PO change order that is pending buyer approval.
- If a requisition line with a special request item is sourced to a purchase order, you can change item price.

- If the requisition line has already been sourced to a purchase order and you increase the item quantity, then a new schedule line for the increase in quantity may be added to the requisition line.
- If commitment control is being used, a change to quantity or price that alters the amount of the requisition is not allowed if the purchase order to which it is associated does not have a header budget status of valid.
- If commitment control is being used, a reduction in the merchandise amount (due to a decrease in item quantity or price) will automatically trigger the budget checking process for pre-encumbrances and encumbrances.

When a requisition line has been sourced to multiple purchase order lines, then some requisition changes are not allowed. The following table outlines these restrictions:

<i>Change to the Requisition Line</i>	<i>Requisition Line Sourced to One PO Line</i>	<i>Requisition Line Sourced to Multiple PO Lines</i>
Item quantity is decreased	Allowed, if the requisition line is sourced to a single purchase order line where the purchase order quantity is same as the requisition quantity. A change request will be created.	Disallowed, if a requisition line is sourced to multiple purchase order lines where purchase order quantity does not match the requisition quantity.
Item quantity is increased	Allowed, if the requisition line is sourced to a single purchase order line where the purchase order quantity is same as the requisition quantity. A change request will be created.	Allowed, if the requisition line is sourced to multiple purchase order lines where purchase order quantity does not match the requisition quantity. Change request is not created. The changed quantity will be available for sourcing.
Item price is changed (increase or decrease)	Allowed	Disallowed, if a requisition line is sourced to multiple purchase order lines, you cannot change the item price.

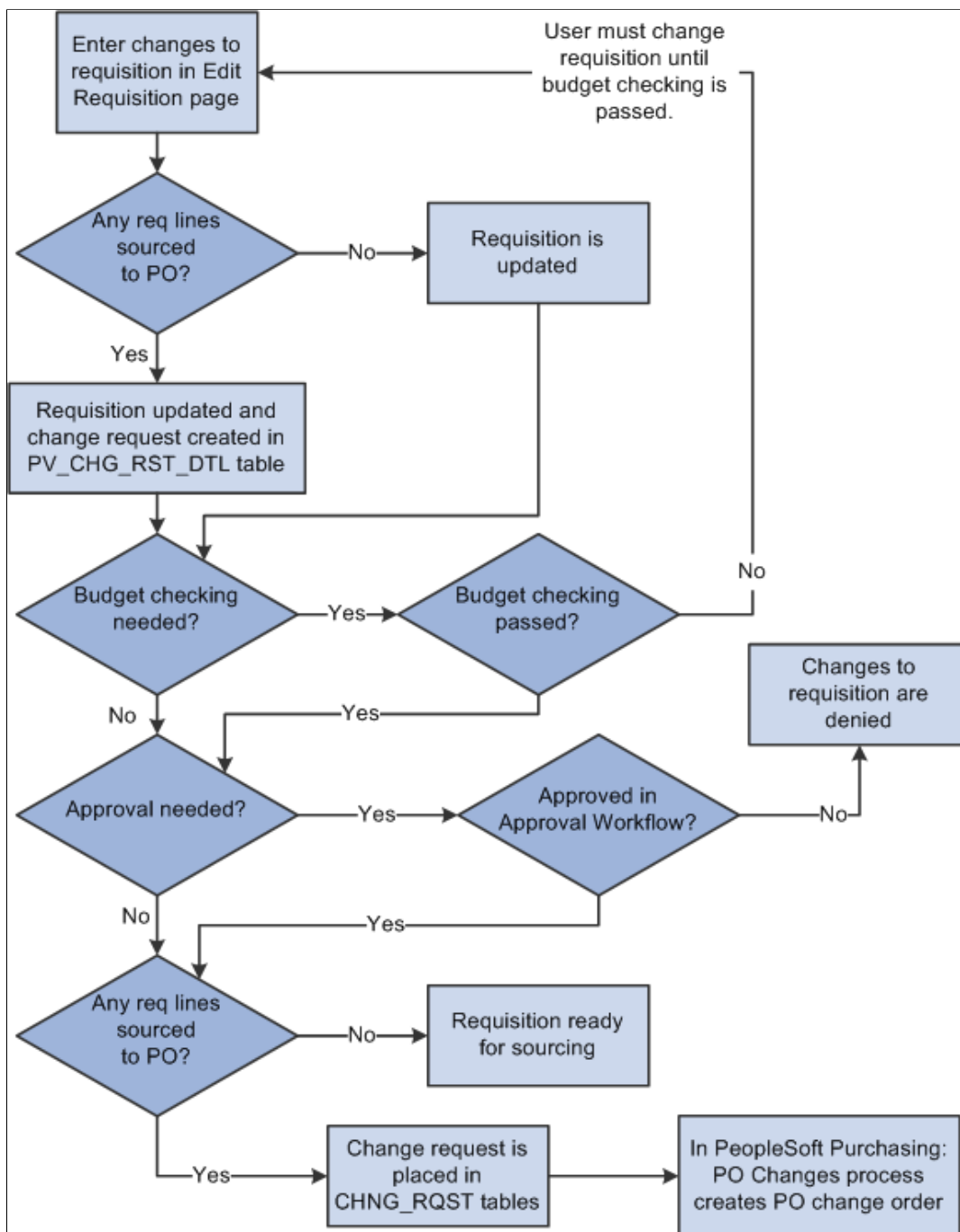
When requisition line is partially sourced to a single purchase order line and the requisition quantity is modified for example if requisition quantity is equal to 5 and partially sourced say 2 to a PO line (consider initial PO quantity is 2 then buyer changes to 5) then user can increase the requisition quantity but change request will not be created. Also user can decrease the requisition quantity to the sourced quantity and change request will not be created.

When requisition line is partially sourced to multiple purchase order lines and the requisition quantity is modified for example if requisition quantity is equal to 5 and sourced partially say 2 to PO line1 and 2 to PO line2 (change PO quantity to 5 or let it remain unchanged) then user can increase the requisition quantity and no change request will be created. Also user can decrease the requisition quantity to the sourced quantity and change request will not be created.

Process Flow for Changing Requisitions and Creating Change Requests

The following diagram illustrates the process flow for changing a requisition:

This diagram illustrates the process flow for changing a requisition.



The business process flow for changing a requisition includes:

- Use the Edit Requisitions component to make changes to the original requisition. When you save your changes the requisition is updated. If you are using the Change Tracking feature, then you can use the View Requisition Change Tracking History page to compare the original requisition to the changed requisition.
- If commitment control is used, then the requisition must pass budget checking before the requisition changes can move forward. The PeopleSoft commitment control feature enables you to check

expenditures against a predefined budget. In PeopleSoft eProcurement, these expenditures occur when a requisition is entered and a pre-encumbrance or encumbrance is established.

For requisition lines that have not been sourced to a purchase order (that is, requisition lines with the status of open, pending, or approved), the requisition is updated but no change request is created. Based on the Reapprove check box on the requisition change template for this business unit, the requisition may require re-approval by the approval workflow framework. Keep in mind that you cannot change a requisition line that has been sourced to a material stock request in PeopleSoft Inventory.

- For requisition lines that have already been sourced to a purchase order, the requisition is updated and a change request is created. This change request is placed in the PV_CHNG_RST_DTL table with a status of pending.
- The Approval Workflow Framework feature is used to route the changed requisition to the correct people for approval or denial. The requisition change template identifies the field changes that require a re-approval of the requisition. If one approver denies the requisition or requisition line, then the changes are removed from the requisition, the change request is canceled, and the business process flow ends. If the changed requisition passes all approvals, then the Approval Workflow Framework sets the requisition to the approved status. For a requisition that has not been sourced to a purchase order, this completes the process flow. If the requisition has been sourced to a purchase order (and a change request was created) then the status of the change request in the PV_CHNG_RST_DTL table is changed from pending to approved. In addition, the change request is also placed in the CHNG_RQST and CHNG_RQST_DTL tables to be picked up by the Change Purchase Orders process.

Note: If budget checking and approval workflow are not needed, then the change request is placed in the PV_CHNG_RST_DTL, CHNG_RQST and CHNG_RQST_DTL tables when the changed requisition is saved.

- In PeopleSoft Purchasing, the Change Purchase Order process picks up the change requests in the CHNG_RQST, and CHNG_RQST_DTL tables, updates the purchase order, and might create a change order for a dispatched purchase order.

See [Edit Requisition-Review and Submit Page](#).

Related Links

“Understanding Requisition Change Tracking” (PeopleSoft Purchasing)

[Understanding the Approval Framework](#)

Common Elements Used in Change Requests

Field or Control	Description
Change Request	A transaction containing changes to a requisition that has already been sourced to one or more purchase orders. Once the changed requisition has been budget checked and approved (if necessary), the change request is picked up by the Change Purchase Orders process in PeopleSoft Purchasing and used to update the purchase order and create a change order for dispatched purchase orders.
Change Order	A copy of a dispatched purchase order that highlights changes to the original purchase order that has already been sent to the supplier. The change order alters the original dispatched purchase order and is submitted to the supplier. You can create a change order in PeopleSoft Purchasing. A change request created in PeopleSoft eProcurement can become a change order in PeopleSoft Purchasing.

Setting Up Requisition Changes and Change Requests

Complete the following steps to setup your PeopleSoft eProcurement system to change requisitions and create change requests:

1. Define reason codes using the reason types of *Procurement Change*.
2. Define reason code and comment settings using the Procurement Change Reason Codes page.
3. Define a change template for requisitions to identify when changes to a requisition should be tracked on the View Requisition Change Tracking History page, when the requisition or requisition line should require re-approval by the approval workflow framework, and when a change request should be created for a sourced requisition. Change templates identify which field changes on a requisition cause the system to generate these actions. To create a change template for requisitions, use the change template type of Requisition.
4. On the Purchasing Definition component, attach a requisition change template to the purchasing business unit that you use to create eProcurement requisitions. In addition, select a value for the Change Option field for requisitions; this field determines if change tracking should be initiated based on the status of the requisition.
5. Setup the approval workflow framework to provide the approval workflow for your requisitions. The original requisition and the changed requisition follow the same approval process.

See [Setting Up Approval Framework in PeopleSoft eProcurement](#).

6. Select or deselect the Allow Changes to Dispatched POs check box on the eProcurement Business Unit Options page. In some cases, especially with direct connect suppliers, you may not want to change the sourced requisition once the purchase order has been dispatched. Select this check box to enable users to change a requisition line when it has been source to a purchase order and the purchase

order has already been dispatched. This value can be overridden by the same option on the linked supplier's Supplier Properties page (ALLOW_PO_CHNG = N).

7. Enable changes to a requisition that has been sourced to a dispatched purchase order based on the individual direct connect supplier. On the linked supplier's Supplier Properties page, enter the property name, ALLOW_PO_CHNG, and select a value of Y or N. If the supplier allows changes to dispatched purchase orders, then enter the value of *Y*. If the supplier does not allow changes to dispatched purchase orders, then enter a value of *N*.
8. Enable eProcurement role actions to specific user roles using the eProcurement Role Actions page. The following role actions can enable or disable features for changing a requisition:
 - *ALLOW_CHANGE_REQUEST*: Users are allowed to edit requisitions and create change requests to a line that has been sourced to a purchase order.
 - *CANCHANGEALL*: Enables a requester to change any field on the requisition without restarting the approval process while the requisition is in a pending status.
 - *CANCHANGEDISTRIB*: Enables the requester to change any field on the requisition distribution without restarting the approval process while the requisition is in a pending status.
 - *CANCHANGEHEADER*: Enables the requester to change any field on the requisition header without restarting the approval process while the requisition is in a pending status.
 - *CANCHANGELINE*: Enables the requester to change any field on the requisition line, with the exception of quantity and price, without restarting the approval process while the requisition is in a pending status.
 - *CANCHANGESCHEDULE*: Enables the requester to change any field on the requisition schedule without restarting the approval process while the requisition is in a pending status.

Pages Used to Set Up the Change Request Feature

Page Name	Definition Name	Usage
"Reason Codes Page" (PeopleSoft Strategic Sourcing)	REASON_CD	Define reason codes which provide explanations for many occurrences within PeopleSoft. When creating reason codes for changes to a requisition, use the reason types of <i>Procurement Change</i>. Reason codes using the <i>Procurement Change</i> reason type can be selected by users when changing a requisition. If you have required comment to be entered when a user changes a requisition, then the Description field on the Reason Codes page is used as the default comment on the requisition.

Page Name	Definition Name	Usage
“Procurement Change Reason Codes Page” (PeopleSoft Purchasing)	BUS_OPT_PM_REASON	Define settings for reason codes and comments used when changing a requisition in PeopleSoft Purchasing, eProcurement, and Services Procurement. These settings enable you to define default reason codes and determine if reason codes or comments should be required. You can define the default reason code for the reason type of <i>Procurement Change</i> .
“Change Template Page” (PeopleSoft Source to Settle Common Information)	CHNG_ORD_TEMPLATE	Define change templates to identify when changes to a requisition should be tracked on the View Requisition Change Tracking History page, when the requisition or requisition line should require re-approval by the approval workflow framework, and when a change request should be created for a sourced requisition. Change templates identify which field changes on a requisition cause the system to generate these actions. To create a change template for requisitions, use the change template type of Requisition. The following field on the REQ_LINE and REQ_LINE_SHIP records are selected for re-approval by default and it is recommended that you keep the Reapprove check box selected on these fields: • MERCHANDISE_AMT • PRICE_REQ • QTY_REQ On the Change Template page, if you select the Track Change check box for the SHIPTO_ID field, then the system tracks changes to both the SHIPTO_ID field and the One Time Address fields. In addition, if you select the Track Change check box for the STATUS field in the REQ_COMMENTS table, then the system enables you to see deleted comments in the change tracking feature (PeopleSoft eProcurement only).

Page Name	Definition Name	Usage
“Req Change Options (requisition change options) Page” (PeopleSoft Purchasing)	BUS_UNIT_REQ_APPR	Define the Change Option field, the change template for requisition changes, and approval requirements for each business unit. The Change Option field determines if change tracking should be initiated for changes to a requisition based on the status of the requisition (approved, sourced, and valid budget checked). The Change Template entered on this page is used by PeopleSoft Purchasing, eProcurement, and Services Procurement. Select the Resubmit Workflow for Quantity and Price Decrease check box to require approval of a changed requisition with a decrease in item quantity or price.
<u>eProcurement Business Unit Options Page</u>	PV_BUS_UNIT_PM	Select the Allow Changes to Dispatched PO check box to enable users to create a change request when the requisition line has been source to a purchase order and the purchase order has already been dispatched. Deselect to prevent users from creating a change request when the purchase order has already been dispatched.
<u>Supplier Properties Page</u>	PV_MS_SEC_SUP_NV	Define linked supplier properties for integration to the Oracle Business Network, a marketplace, and a direct connect suppliers. If the supplier allows changes to dispatched purchase orders, then enter a value of Y for the property name ALLOW_PO_CHNG. If the supplier does not allow changes to dispatched purchase orders, then enter a value of N.
<u>Assign Role Actions To Roles Page</u>	PV_ACTIONS	Attach role actions to user roles.

Changing Requisitions

Using the Edit Requisitions component, you can change an existing requisition that has been approved, sourced to a purchase order, or sourced to a dispatched purchase order. However you cannot change the price for requisitions partially sourced to a purchase order. Use the Manage Requisitions page to determine the status of your requisition.

To make changes to the requisition header or requisition lines, go to the Manage Requisitions page, locate the requisition you wish to change, select *Edit* in the Select Action field, and click the Go button. Make your changes on the Edit Requisition component. When you save the page:

- The requisition is updated with your changes. If you change a requisition where no requisition lines have been sourced, then the system updates the requisition. If you change a requisition that has one or more lines that have already been sourced to a purchase order, then the system updates the requisition and creates a change request. You can edit any line that has been dispatched, but not closed, as long as change requests are allowed for the dispatch status. Changes to dispatched purchase orders can also be limited by your setup.
- A pop-up window displays where you can enter a reason code and comments. A reason code or comment can be required or optional based on your settings on the Procurement Change Reason Codes page.
- The Change Tracking feature is invoked based on the status of your requisition, your requisition change template, and the setting in the Change Option field of the Purchasing Definition-Req Change Options page. The Change Tracking feature includes changes to any fields marked for track change on the template, the user who modified the requisition, and the date and time of each change. This information is written to the REQ_CHNG_HDR, REQ_CHNG_LINE, and REQ_CHNG_SHIP tables. If the Change Tracking feature is used, a track batch sequence number is added to the top of the Edit Requisition-Review and Submit page. PeopleSoft eProcurement and Services Procurement share the same track batch number sequence. For a requisition that is altered more than once, the track batch sequence number is increased by one for each time you change the requisition.
- When Change Track Option is set to Approved and change tracking is invoked for an approved requisition line, you cannot delete that line. You can only cancel the line.
- When the Change Track Option is set to *Sourced* and the Change Template is *Standard*, you can view the Change Request/Line Approval Summary when the requisition is submitted on the Edit Requisition page. The summary includes the Line number, Item Description, and the status of the Change Request (Created or Updated).
- If any fields have been changed which are marked as needing re-approval on the requisition change template, then the approval workflow framework is initiated. The changed requisition must complete the approval process from the beginning. Role actions take precedent over the template settings in determining whether re-approval is required.

Pages Used to Change Requisitions

Page Name	Definition Name	Usage
<u>Review and Submit Page</u>	PV_REQ_CHECKOUT	Make changes to an existing requisition. Your changes here can update the requisition, record change tracking, and restart approval workflow. For sourced requisitions, your changes can generate a change request.

Page Name	Definition Name	Usage
Change Reason	REQ_CHNG_REASON	Enter a reason code and comment for the changes that you have made to the requisition. This information is stored in the requisition change request tables (REQ_CHNG_REASON). • Save a requisition after entering changes on the Edit Requisition component. • For an existing requisition with changes, click the Current Change Reason link on the Edit Requisition-Review and Submit page.
<u>Confirmation Page</u>	PV_REQ_WF_PREVIEW	Displays information after you save the requisition. The Budget Status field and the requisition Status field will change if your requisition changes prompt budget checking and re-approval of the requisition. In addition the Change Request/Line Approval Summary group box displays requisition line information for change requests and approval workflow.

Edit Requisition-Review and Submit Page

Use the Edit Requisition-Review and Submit page (ePV_REQ_FORM) to make changes to an existing requisition.

Your changes here can update the requisition, record change tracking, and restart approval workflow. For sourced requisitions, your changes can generate a change request.

Navigation:

eProcurement > Manage Requisitions. Select Edit in the Select Action field and click the Go button.

For information about the Edit Requisition component, see the "Managing Requisitions in PeopleSoft eProcurement" chapter.

See [Edit Requisition-Review and Submit Page](#).

Change Reason Page

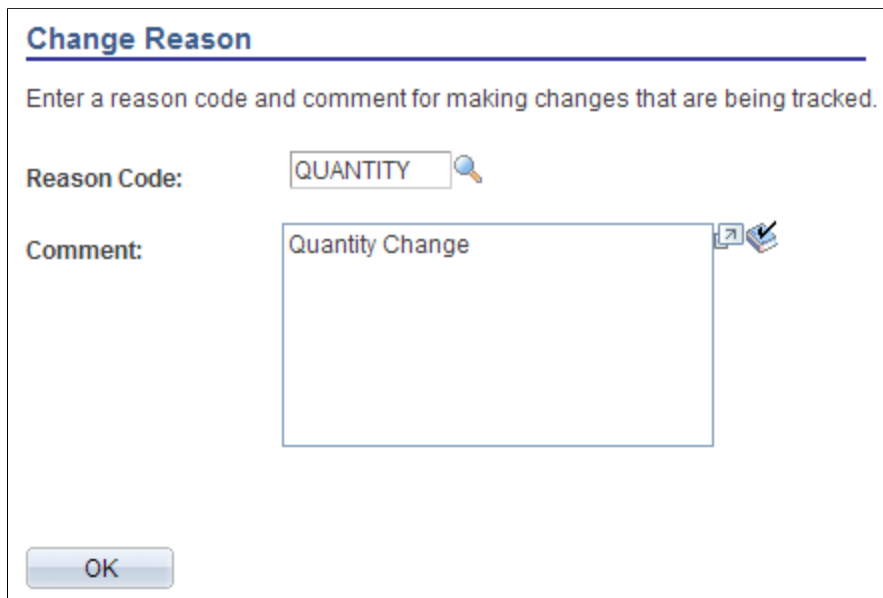
Use the Change Reason page (REQ_CHNG_REASON) to enter a reason code and comment for the changes that you have made to the requisition.

This information is stored in the requisition change request tables (REQ_CHNG_REASON).

Navigation:

- Save a requisition after entering changes on the Edit Requisition component.
- For an existing requisition with changes, click the Current Change Reason link on the Edit Requisition-Review and Submit page.

This example illustrates the fields and controls on the Change Reason page.



Change Reason

Enter a reason code and comment for making changes that are being tracked.

Reason Code:

Comment:

OK

Use the Change Reason page to view or change the reason code and comments attached to a changed requisition. A default value for the reason code can be defined on the Procurement Change Reason Codes page to be used by any changed requisition in the Purchasing business unit. In addition, the Description field for the default reason code (entered on the Reason Codes page) is used as the default comment on the requisition.

Confirmation Page

Use the Confirmation page (PV_REQ_WF_PREVIEW) to displays information after you save the requisition.

The Budget Status field and the requisition Status field will change if your requisition changes prompt budget checking and re-approval of the requisition. In addition the Change Request/Line Approval Summary group box displays requisition line information for change requests and approval workflow.

Navigation:

- Click the OK button on the Change Reason page.
- If no reason code is needed, click the **Save and Submit** button on the Review and Submit page

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

Confirmation

Your requisition has been submitted.

Requested For	Michael Buhler	Number of Lines	2
Requisition Name	0000000005	Total Amount	2,231.77 FRF
Requisition ID	0000000005	VAT Amount	249.61 FRF
Business Unit	FRA01	Requisition Amount	2,481.38 FRF
Status	Approved	Pre-Encumbrance Balance	2356.57 FRF
Priority	Medium		
Budget Status	Valid		

View printable version
 Edit This Requisition
 Check Budget
 Pre-Check Budget

This section only discusses the fields on the Confirmation page that are related to changing an existing requisition and creating change requests. For more information about the Confirmation page, see the "Creating Requisitions in PeopleSoft eProcurement" chapter.

See [Confirmation Page](#).

Field or Control	Description
Status	Displays the status of a requisition. Values are <i>Open</i> , <i>Pending</i> , <i>Approved</i> , and <i>Complete</i> .
Budget Status	If the Commitment Control feature is turned on, then this field displays the current budget checking status for this requisition.

Change Request/Line Approval Summary

This group box displays if you have changed an existing requisition.

Field or Control	Description
Change Request	Displays the change request created for this requisition line. Change requests are only created if the requisition line has been sourced to a purchase order and your system is setup to allow change requests.

Field or Control	Description
Line Re-Approval	Displays the current state for workflow approval for this line. If you have changed a field marked for re-approval on the requisition change template, then the approval workflow framework resets this requisition line to the pending status and the approval process must be completed again from the beginning.

Viewing Requisition Change Tracking History

The Change Tracking feature provides you with an audit trail of key transactional information including, changes to any fields marked for track changes on the change template, the user who modified the requisition, and the date and time of each requisition change request. This information is written to the REQ_CHNG_HDR, REQ_CHNG_LINE, and REQ_CHNG_SHIP tables. For a requisition that is altered more than once, the track batch (change batch) sequence number is increased by one for each time the requisition is changed. The Change Tracking feature is invoked base on the status of your requisition, your requisition change template, and the setting in the Change Option field of the Purchasing Definition-Req Change Options page. If no requisition change template is defined for the business unit, then the change tracking feature does not record any changes.

Pages Used to View Requisition Change Tracking History

Page Name	Definition Name	Usage
Requisition Change Tracking History Page	PV_CHNG_TRK_HIST	View the changes that have been made to this requisition. This page includes changes to any fields marked for track change on the requisition change template used for this business unit. You can review the change made to the field, the user who modified the requisition, and the date and time the changed requisition was saved.
Change Tracking Filter Criteria Page	PV_CHNG_FILTER	Enter filters to narrow your display results on the Requisition Change Tracking History page. Filter criteria are applied to one individual requisition and help you focus on a particular type of change, especially with a requisition containing many lines or multiple changes.

Page Name	Definition Name	Usage
<u>Deleted Comments Page</u>	PV_REQ_CHNG_CMMT	Displays comments that have been deleted from the requisition at the header, line, or ship to level. In order to see deleted comments, you must select the Track Change check box for the STATUS field in the REQ_COMMENTS table. The ability to see deleted comments is only available for PeopleSoft eProcurement.
<u>Requisition Change Tracking One Time Address Page</u>	PV_REQ_CHNG_ADDR	View the one time shipping address added to a requisition line.
<u>Change Reason Code Page</u>	PV_CHANGE_REASON	Review the reason code and comments added when the requisition was changed.
<u>Review Change Tracking (Fluid) Page</u>	PV_MOB_855_TRAK_FL	View requisitions that have been changed, using the Fluid user interface.
<u>Change Tracking Details (Fluid) Page</u>	PV_MOB_855_TRAKSCF	View line and schedule changes as well as the change reason code, using the Fluid user interface.

Requisition Change Tracking History Page

Use the Requisition Change Tracking History page (PV_CHNG_TRK_HIST) to view the changes that have been made to this requisition.

This page includes changes to any fields marked for track change on the requisition change template used for this business unit. You can review the change made to the field, the user who modified the requisition, and the date and time the changed requisition was saved.

Navigation:

eProcurement > Manage Requisitions. On the Manage Requisitions page, click the Review Change Tracking link.

This example illustrates the fields and controls on the Requisition Change Tracking History page (1 of 2). You can find definitions for the fields and controls later on this page.

Requisition Change Tracking History

▼ **Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

*Business Unit Requisition Name

Requisition ID From Requisition ID To

Requester Modified By

Date From Date To

Requisition Change Tracking

To view requisition change tracking history detail records, click the Expand triangle icon.

Req ID	Requisition Name	Requester Name	Modified By	Last Changed	Track Batch	Filter By
▼ 0000000141	0000000141	Mary Gee	Mary Gee	06/22/2009 11:54:50AM	1	Filter Criteria

Line Changes

There are no changes recorded for Requisition header.

Personalize | Find | View All | | First 1-4 of 4 Last

Line	Batch	Seq	Change Type	Description	Value	Modified By	Last Changed
1	0	0	Original	Merchandise Amount	15248.80000	MGEE	06/22/2009 11:54:50AM
1	0	0	Original	Requisition Quantity	10.00000	MGEE	06/22/2009 11:54:50AM
1	1	1	Change	Merchandise Amount	9149.28000	MGEE	06/22/2009 11:54:50AM
1	1	1	Change	Requisition Quantity	6.00000	MGEE	06/22/2009 11:54:50AM

This example illustrates the fields and controls on the Requisition Change Tracking History page (2 of 2). You can find definitions for the fields and controls later on this page.

Schedule Changes

Personalize | Find | View All | | First 1-5 of 8 Last

Line	Sched	Batch	Seq	Change Type	Description	Value	Modified By	Last Changed
1	1	0	0	Original	Attention To	Atamian,Wes	MGEE	06/22/2009 11:54:50AM
1	1	0	0	Original	Merchandise Amount	15248.80000	MGEE	06/22/2009 11:54:50AM
1	1	0	0	Original	Requisition Quantity	10.00000	MGEE	06/22/2009 11:54:50AM
1	1	0	0	Original	Ship To Location	US001	MGEE	06/22/2009 11:54:50AM
1	1	1	1	Change	Attention To	Gee,May	MGEE	06/22/2009 11:54:50AM

► 0000000140 0000000140 Mary Gee Mary Gee 06/22/2009 11:56:11AM 1 Filter Criteria

[Return to Manage Requisitions](#)

Field or Control	Description
Search Requisitions	Use the Search Requisitions group box to enter search criteria to display one or more requisitions. The Business Unit is a required field. Click the Search button to display requisitions matching your criteria in the Requisition Change Tracking group box.

Field or Control	Description
Req ID	Click the requisition ID link to access the Requisition Details page (PV_REQ_PO_DTLS). See Requisition Details Page .
Filter Criteria	Click this link to access the Filter Options page where you can specify filters to narrow your display results. Filter criteria are applied to one individual requisition and help you focus on a particular type of change, especially with a requisition containing many lines or multiple changes.

In the Header Changes, Line Changes, and Schedule Changes group boxes, you can view the changes made to the requisition at each of these levels. The following columns are used:

Field or Control	Description
Line and Sched	Displays the requisition line and requisition schedule line.
Batch and Seq	The Batch and Sequence columns display the chronological order of the changes to the requisition. The most recent changes are displayed at the top of the grids. The Batch number represents the number of times the requisition has been changed and saved. Zero reflects the original creation of the entire requisition. The Sequence number represents the number of times the header, line, or shipment schedule line has been changed. When the requisition is first created, both the batch and sequence numbers are zero. The original value for a field is always displayed at the bottom of the change list. You may need to use the Last link in the group box header to see the original values. With changes to the requisition, the batch and sequence number change. For example: 1. You create and save a requisition with 3 lines. The batch and sequence numbers for the header, line, and shipment schedule are all zero. 2. You change line 3 of the requisition and save your changes. The batch number is 1 and the sequence number for line 3 is 1; however, the header and other lines were not changed and are at sequence number zero. 3. You change the header of the requisition and line 1 and then save your changes. The batch number is now 2 (You have changed the requisition twice). For the header the sequence is 1 within batch number 2 (You have changed the header data once) and line 1 is also sequence number 1 within batch 2. Line 3 remains sequence 1 within batch 1.

Field or Control	Description
Change Type	Displays the category of the change. The options are: • <i>Change</i>: The field value was changed. • <i>Deleted</i>: The field value was deleted. • <i>Inserted</i>: One or more blank fields were populated. • <i>Original</i>: Displays the field value when the requisition was first created.
Description	Displays a description of the field or fields that were changed.
Value	Displays the changed, inserted, or original field value entered on the requisition or a link to another page that displays the values. Links include: • <i>One Time Address</i>: Click to access the Requisition Change Tracking One Time Address page where you can view the one time address fields added to this requisition schedule line. • <i>Header Comments</i>: Click to access the Delete Comments page and view comments that have been deleted from the header level of the requisition. • <i>Line Comments</i>: Click to access the Delete Comments page and view comments that have been deleted from the line level of the requisition. • <i>Ship To Comments</i>: Click to access the Delete Comments page and view ship to comments that have been deleted from the requisition.
Modified By	Displays the user ID of the person who changed the requisition.
Last Changed	Displays the date and time of the last change to this field.
Reason Code	Displays the reason code entered when this change was made. Click this link to access the Change Reason Code page where you can review the reason code and comments added when this requisition was changed. This column does not display if a reason code was not entered.

Change Tracking Filter Criteria Page

Use the Change Tracking Filter Criteria page (PV_CHNG_FILTER) to enter filters to narrow your display results on the Requisition Change Tracking History page.

Filter criteria are applied to one individual requisition and help you focus on a particular type of change, especially with a requisition containing many lines or multiple changes.

Navigation:

Click the Filter Criteria link on the Requisition Change Tracking History page.

This example illustrates the fields and controls on the The Change Tracking Filter Criteria page. You can find definitions for the fields and controls later on this page.

Use the Change Tracking Filter Criteria page to narrow the information displayed about an individual requisition. Once you enter values in this page, the filter limits the requisition details displayed on the Requisition Change Tracking History page. If no requisition details match your filter then a message is displayed on the Requisition Change Tracking History page. To see all of the requisition details after applying a filter, you must enter this page and clear the filter criteria.

Field or Control	Description
Reason Code	Enter a reason code to limit the rows displayed to changes made with this reason code.
Change Track Batch	Enter the batch number to be displayed. Only changes made with this batch number are displayed for the requisition.
Requisition Header	Limit the requisition header details displayed to changes in the requester or currency code.
Requisition Line	Limit the requisition line details displayed to changes in item category ID, item ID, merchandise amount, requisition price, or requisition quantity.
Requisition Schedule	Limit the requisition schedule line details displayed to changes in the attention to field, merchandise amount, requisition price, requisition quantity, or ship to location.

Deleted Comments Page

Use the Deleted Comments page (PV_REQ_CHNG_CMMT) to displays comments that have been deleted from the requisition at the header, line, or ship to level.

In order to see deleted comments, you must select the Track Change check box for the STATUS field in the REQ_COMMENTS table. The ability to see deleted comments is only available for PeopleSoft eProcurement.

Navigation:

- Click the Header Comments link within the Header Changes group box on the Requisition Change Tracking History page.
- Click the Line Comments link within the Line Changes group box on the Requisition Change Tracking History page.
- Click the Ship To Comments link within the Header Changes group box on the Requisition Change Tracking History page.

This example illustrates the fields and controls on the Delete Comments page showing line comments that were deleted. You can find definitions for the fields and controls later on this page.

Deleted Comments

Business Unit US001 Requisition Name

Requisition ID 0000000149

Deleted Comments Personalize | Find | View All | | First 1 of 1 Last

Line Number	Change Batch	Change Sequence	Modified By	Last Changed	Comment Number	Comment Type	Comments
1	3		2 VP1	02/14/2013 12:15:19PM	663	LIN	Deliver to front reception desk on third floor.

Return

Use the Deleted Comments page to view comments that have been deleted from the requisition header, line, or ship to levels. In order to see deleted comments, navigate to the requisition Change Template page and select the Track Change check box for the STATUS field in the REQ_COMMENTS table. The ability to see deleted comments is only available for PeopleSoft eProcurement.

Field or Control	Description
Track Batch	Displays the track batch number of the change that deleted the comment.
Modified By	Displays the user ID of the person who deleted the comment.

Field or Control	Description
Comment Type	The comment types are: • <i>HDR</i> • <i>LIN</i> • <i>SHP</i>
Comments	Displays the comment that was deleted.

Requisition Change Tracking One Time Address Page

Use the Requisition Change Tracking One Time Address page (PV_REQ_CHNG_ADDR) to view the one time shipping address added to a requisition line.

Navigation:

Click the One Time Address link on the Requisition Change Tracking History page.

This example illustrates the fields and controls on the Requisition Change Tracking One Time Address page.

Requisition Change Tracking One Time Address

Business Unit	US001	Req ID	0000000149	Line	1	Sched Num	1

Address

Country	USA United States	Prefix	
Address 1	777 Road AVE	Phone	
Address 2		Ext	
Address 3		Fax	
City	San Francisco	Postal	55512
County			
State	CA California		

View the one time shipping address added to a requisition line.

On the Change Template page, if you select the Track Change check box for the SHIPTO_ID field, then the system tracks changes to both the SHIPTO_ID field and the One Time Address fields.

Change Reason Code Page

Use the Change Reason Code page (PV_CHANGE_REASON) to review the reason code and comments added when the requisition was changed.

Navigation:

Click the reason code link in the Reason Codes column of the Requisition Change Tracking History page.

This example illustrates the fields and controls on the Change Reason Codes page.

Change Reason Code

Business Unit US001

Requisition Name 0000000149

Requisition ID 0000000149

Reason Code

Reason Seq 1

Entered By VP1

Reason Code QUANTITY

Entered Datetime 02/13/2013 11:54AM

Comment Quantity Change

Return

Review the reason code and comments added when the requisition was changed. This reason code could be required, optional, or not used based on your entries in the Procurement Change Reason Codes page.

See “Procurement Change Reason Codes Page” (PeopleSoft Purchasing).

Review Change Tracking (Fluid) Page

Use the Review Change Tracking (Fluid) page (PV_MOB_855_TRAK_FL) to view requisitions that have been changed, using the Fluid user interface.

Navigation:

eProcurement tile > Change Tracking tile

This example illustrates the fields and controls on the Review Change Tracking (Fluid) page. You can find definitions for the fields and controls later on this page.

Review Change Tracking						
Business Unit	Requisition ID	Requisition Name	Requester	Last Modified By	Track Batch	
US001	0000000180	0000000180	Kenneth Schumacher	Kenneth Schumacher	1	>

Use filters to narrow the displayed result. The From Date that appears on this page is based on the entered Fluid Filter Default Days on the Installation Options page. If no From Date is defined, then the default From Date is 14 days from the current date. You can also configure common filter values retention and filter search field options on the Installation Options page. To know more, refer to the Filter Retention Options section on the [Setting Up Installation Options for Fluid eProcurement](#).

Note: Depending on the amount of data you have, performance will be affected if too much data is pulled. PeopleSoft does not recommended pull hundreds of rows into this component. Narrow the results using the filters.

Field or Control	Description
Track Batch	Select this link to access the Requisition Batch Changes page (PV_MOB_BATCH_SCF), which provides the date the revision was made.

Change Tracking Details (Fluid) Page

Use the Change Tracking Details (Fluid) page (PV_MOB_855_TRAKSCF) to view line and schedule changes as well as the change reason code, using the Fluid user interface.

Navigation:

eProcurement tile > **Change Tracking tile**. Select the Details button.

This example illustrates the fields and controls on the Change Tracking Details (Fluid) page. You can find definitions for the fields and controls later on this page.

Change Tracking Details																																																					
Requisition Summary Business Unit: US001 Requisition ID: 0000000180 Requisition Name: 0000000180 Last Modified By: Kenneth Schumacher																																																					
Line Changes Line 4 rows <table> <tr> <th>Line</th><th>Batch</th><th>Seq</th><th>Change Type</th><th>Description</th><th>Value</th><th>Modified By</th><th>Last Changed</th><th>Reason Code</th></tr> <tr> <td>1</td><td>0</td><td>0</td><td>Original</td><td>Merchandise Amount</td><td>2018</td><td>VP1</td><td>01/14/2019 4:33:12PM</td><td></td></tr> <tr> <td>1</td><td>0</td><td>0</td><td>Original</td><td>Requisition Quantity</td><td>1</td><td>VP1</td><td>01/14/2019 4:33:12PM</td><td></td></tr> <tr> <td>1</td><td>1</td><td>1</td><td>Change</td><td>Merchandise Amount</td><td>4036</td><td>VP1</td><td>01/14/2019 4:33:12PM</td><td>QUANTITY</td></tr> <tr> <td>1</td><td>1</td><td>1</td><td>Change</td><td>Requisition Quantity</td><td>2</td><td>VP1</td><td>01/14/2019 4:33:12PM</td><td>QUANTITY</td></tr> </table>									Line	Batch	Seq	Change Type	Description	Value	Modified By	Last Changed	Reason Code	1	0	0	Original	Merchandise Amount	2018	VP1	01/14/2019 4:33:12PM		1	0	0	Original	Requisition Quantity	1	VP1	01/14/2019 4:33:12PM		1	1	1	Change	Merchandise Amount	4036	VP1	01/14/2019 4:33:12PM	QUANTITY	1	1	1	Change	Requisition Quantity	2	VP1	01/14/2019 4:33:12PM	QUANTITY
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<i>Field or Control</i>	<i>Description</i>
Reason Code	Select to access the Change Reason Code page (PV_MOB_CHANGE_SCF) where you can view who entered the change, the date and time the change was made, and comments that may have been entered.

Viewing Change Requests

The Review Change Requests inquiry page enables you to view the existing change requests and monitor the approval status.

Pages Used to View Change Requests

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Review Change Requests (Classic) Page</u>	PV_CHNG_RQST_LIST	View and monitor the approval status of your change requests using the Classic User Interface.
<u>Review Change Requests (Fluid) Page</u>	PV_MOV_855_CHNG_FL	View all of your change requests using the Fluid User Interface.
<u>Change Request Details (Fluid) Page</u>	PV_MOB_855_CHNGSCF	Monitor the approval status of a change request using the Fluid User Interface.

Review Change Requests (Classic) Page

Use the Review Change Requests (Classic) page (PV_CHNG_RQST_LIST) to view and monitor the approval status of your change requests using the Classic User Interface.

Navigation:

eProcurement > Manage Requisitions

Click the **Inquire Change Request** link on the Manage Requisitions page.

This example illustrates the fields and controls on the Review Change Requests (Classic) page. You can find definitions for the fields and controls later on this page.

Review Change Requests

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

*Business Unit

Requisition ID From

Requisition ID To

Requester

PO ID

Change Date From

Requisition Name

Entered By

Change Request Status

Change Date To

Requisition Change Requests

To view requisition change request detail records, click the Expand triangle icon.

Requisition ID	Requisition Name	Purchase Order	Change Date/Time	Requisition Approval Status	Change Request Status	Processing Error
▶ 0000000141	0000000141	0000000204	06/22/2009 11:54:45AM	Approved	Ready for Process	
▶ 0000000140	0000000140	0000000204	06/22/2009 11:56:11AM	Approved	Ready for Process	
▼ 0000000091	0000000091	0000000057	08/05/2003 3:34:28PM	Approved	Initialize	

Requester: Kenneth Schumacher Entered By: Theresa Monroe

Change Request Details Personalize | Find | View All | | First 1 of 1 Last

Change Requests	Change Reason	Processing Errors							
Line	Sched	Change Date/Time	Item Description	Change Type	Field	Prior Value	Changed Value	Requisition Approval Status	Change Request Status
1	1	08/19/2003 11:27:53AM	775-fill Mummy Sleeping Bag	Change	Ship To Location		US002	Approved	Initialize

[Return to Manage Requisitions](#) [Approve Change Requests](#)

Search Requisitions group box

Enter search criteria and the click the **Search** button to display change requests in the Requisition Change Requests group box.

Field or Control	Description
Business Unit	Enter the Purchasing business unit of the change request. This is a required field.
Requisition ID From and Requisition ID To	Enter one or a range of requisition IDs.
Entered By	Search by the user ID who entered the requisition. This is the REQ_HDR.OPRID field in the REQ_HDR table.

Field or Control	Description
Change Process Status	Select the status of the change requests you want to view. This is the CHG_PROCESS_STATUS field in the CHNG_RQST_DTL table. Values are: • <i>Initialized</i>: The change request has been added but it has not been picked up by PeopleSoft Purchasing. • <i>In Process</i>: The system is currently using this change request to update a purchase order and maybe build a PO change order. • <i>Complete</i>: The purchase order has been updated with the changes from this change request and a PO change order may have been created. • <i>Errors</i>: The Change Purchase Order process attempted to update the purchase order with the changes from this change request but an error was encountered.

Requisition Change Requests group box

The Requisition Change Requests group box displays the change requests that match your search criteria.

Field or Control	Description
	Click the Expand Section icon to display information about each requisition change request, including; the individual requisition lines, the changes made to the original requisition, change reason codes and comments, and any processing errors.
Requisition ID	Click the requisition ID link to access the Requisition Details page (PV_REQ_PO_DTLS) where you can review each line, the purchase order line it was sourced to, and the status of the purchase order. See Requisition Details Page.
Purchase Order	Displays the purchase order ID linked to this sourced requisition.
Change Date/Time	Displays the date and time of the changes to the requisition.

Field or Control	Description
Re-Approval Status	Displays the approval status of the changed requisition within the approval workflow framework. The options are pending, denied, approved, or see below (lines do not have the same status).
Change Request Status	Displays the status of the requisition change request. This is the CHG_PROCESS_STATUS field in the CHNG_RQST_DTL table. Values are: • <i>Initialize</i>: The change request has been added. • <i>Ready for Process</i>: The change request is ready to be picked up by PeopleSoft Purchasing. • <i>In Process</i>: The system is currently using this change request to update a purchase order and maybe build a PO change order. • <i>Complete</i>: The purchase order has been updated with the changes from this change request and a PO change order may have been created. • <i>Errors</i>: The Change Purchase Order process attempted to update the purchase order with the changes from this change request but an error was encountered.
Processing Error	Displays <i>Y</i> if any of the change request lines have processing errors. The message set, message number, and message are displayed in the Processing Errors tab under the Expand Section icon. This processing error occurs when the change request is pick up by the Change Purchase Orders process in PeopleSoft Purchasing.

Review Change Requests (Fluid) Page

Use the Review Change Request (Fluid) page (PV_MOV_855_CHNG_FL) to view all of your change requests using the Fluid User Interface.

Navigation:

eProcurement Tile > Change Requests tile

This example illustrates the fields and controls on the Review Change Requests (Fluid) Page.

Review Change Requests						
Business Unit	Requisition ID	Requisition Name	Purchase Order	Change Date/Time	Change Request Status	Processing Error
US001	0000000180	0000000180	0000000394	01/14/2019 4:34:13PM	Completed	No
US001	0000000091	0000000091	0000000057	08/05/2003 3:34:28PM	Initialize	No

Use filters to narrow the displayed result. The From Date that appears on this page is based on the entered Fluid Filter Default Days on the Installation Options page. If no From Date is defined, then the default From Date is 14 days from the current date. You can also configure common filter values retention and filter search field options on the Installation Options page. To know more, refer to the Filter Retention Options section on the [Setting Up Installation Options for Fluid eProcurement](#).

Change Request Details (Fluid) Page

Use the Change Request Details (Fluid) page (PV_MOB_855_CHNGSCF) to monitor the approval status of a change request using the Fluid User Interface.

Navigation:

eProcurement Tile > Change Requests tile. Select the Details button.

This example illustrates the fields and controls on the Change Request Details (Fluid) page. You can find definitions for the fields and controls later on this page.

Change Request Details

▼ Requisition Summary

Business Unit US001

Requisition ID 0000000180

Requisition Name 0000000180

Requester Name: VP1

Entered By VP1

Change Request Details

1 row

Change Requests

Change Reason

Processing Error

Show All

Line	Sched	Change Date/Time	Item ID	Item Description	Change Type	Field Name	Field	Prior Value	Changed Value	Requisition Approval Status	Change Request Status
1	1	01/14/2019 4:33:11PM	DSS_LAPTOP_MAC	Appleby McBrook Laptop	Change	QTY_REQ	Requisition Quantity	1.00000	2.00000	Approved	Completed

Change Requests Tab

Field or Control	Description
Item Description link	Select to access the Item Description window, which provides a requisition summary.

Change Reason Tab

Use this information to view the change reason.

Processing Change Requests in PeopleSoft Purchasing

If you have changed an eProcurement requisition that has already been sourced to a purchase order, then a change request might be created and placed in the PV_CHNG_RST_DTL table. When the changed requisition has completed budget checking and approval workflow, the change request in the PV_CHNG_RST_DTL table is changed from a pending status to an approved status. In addition, the change request is also placed in the PeopleSoft Purchasing tables; CHNG_RQST and CHNG_RQST_DTL. These tables contain change requests from many different sources, including; PeopleSoft eProcurement, PeopleSoft Inventory, PeopleSoft Manufacturing, PeopleSoft Order Management, PeopleSoft Supply Planning, third-party sources, as well as PeopleSoft Purchasing itself. The Change Purchase Order process in PeopleSoft Purchasing picks up the change requests and updates the purchase order. For purchase orders that have already been dispatched, a change order could be created and dispatched to the supplier.

For more information on change request processing in PeopleSoft Purchasing, see “Creating Change Orders from Approved Change Requests” (PeopleSoft Purchasing) .

See “Understanding the Purchase Order Change Order Business Process” (PeopleSoft Purchasing).

PeopleSoft eProcurement contains links to the following PeopleSoft Purchasing pages:

- Approve Change Requests page.
- Change Purchase Orders process.

Pages Used to Process Change Requests in PeopleSoft Purchasing

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
“Approve Change Requests Page” (PeopleSoft Purchasing)	CHNG_ORD_LOOKUP	Review and approve change requests.
“Change Purchase Orders Page” (PeopleSoft Purchasing)	RUN_PO_POCHNG	Select parameters for and run the Change Purchase Order process.

Receiving Stock and Returning Items to Suppliers

Understanding Receiving Stock

This section discusses:

- The common element used in this chapter.
- Stock receipt.
- Items received by amount.
- Receipt notification workflow.
- Options for receiving stock.

The Common Element Used

<i>Field or Control</i>	<i>Description</i>
Receipt Status	Select from these values: <i>Open:</i> The receipt is being entered into the system and has not yet been saved, or the receipt has been entered and saved but might be missing required information. <i>Received:</i> The receipt has been entered and saved. <i>Hold:</i> A power user has put the receipt on hold. <i>Moved:</i> The necessary items in the receipt have been successfully passed to PeopleSoft Asset Management, PeopleSoft Inventory, or PeopleSoft Manufacturing (if those applications are installed). <i>Complete:</i> The receipt has finished all steps and is closed. <i>Cancelled:</i> The receipt was entered and saved, but then canceled. A cancellation cannot be reversed.

Stock Receipt

When you enter a requisition, PeopleSoft eProcurement processes it, places it on a purchase order (PO), and sends (dispatches) it to the supplier. If PeopleSoft Inventory is installed, the requisition might come

from the warehouse stock instead of from a supplier. When you receive the requested items, you record the receipt, which enables the buyers to track the quality and promptness of suppliers.

The PeopleSoft application assigns a receipt ID to each saved receipt. Because a one-to-one ratio does not exist between POs and receipts—a PO might have multiple receipt IDs due to multiple shipments or a shipment might have multiple POs—this ID is stored separately from the dispatched purchase order or the original requisition. If PeopleSoft Payables is installed, a process matches the receipts to the POs (to confirm that the goods were shipped) before the supplier is paid.

Note: To record a receipt before the accounts payable department can pay the supplier, select *Receiving Required* for the item.

Items Received by Amount

A receipt is usually recorded based on the quantity that is received. However, you can also receive by amount in PeopleSoft eProcurement. This feature is particularly useful if you order and receive services.

Related Links

“Receiving Items by Amount” (PeopleSoft Purchasing)

Receipt Notification Workflow

PeopleSoft eProcurement enables requesters to record the receipt of their own goods. Because some requesters do not record their receipts promptly, the workflow process for receipt notification reminds requesters to receive their goods. If PeopleSoft Payables records the voucher (supplier's invoice) for the PO but no receipt is entered, workflow inserts a reminder in the To Do List of the requester.

Related Links

[Maintaining System Users and Roles](#)

Options for Receiving Stock

After a PO is dispatched, the supplier ships the stock. When the stock arrives at the location, use the receiving area to record the receipt. PeopleSoft eProcurement offers several options for receiving stock:

<i>Term</i>	<i>Definition</i>
Casual user receiving	This is the default setting. Items are delivered directly to a casual user's desk or area without being routed through the central receiving department. For example, a Federal Express shipment is delivered directly to you or an assistant. To enter the receipt, the user opens the original requisition and links to the requisition's PO. The user then records the receipt on a simplified form.

Term	Definition
Casual user receiving with edit and cancel privileges	A casual user can also be granted privileges to edit and cancel receipts and to override a supplier's return address. To have these privileges, the casual user's roles must contain a user role that is included under RECV_CASUAL_ALL on the eProcurement Role Actions page.
Receiving by Ship To Location	A casual user can be set up to receive all items shipped to a ship to location specified as the Default Ship To location in the Receiver Setup page. This is controlled by role action RECV_BY_SHIPTO.
No receiving privileges	To prevent the casual user from having access to the receiving area of PeopleSoft eProcurement, the roles must contain a user role that is included under NO_CASUAL_RECV on the eProcurement Role Actions page.
Power receiving	A power user is an individual in the receiving department or a purchasing professional who receives items by using the receiving pages in PeopleSoft Purchasing. The power user selects the PO and creates the receipt. The power user can also record a receipt without a PO. To be a power user, the roles must contain a user role that is included under RECV_POWER on the eProcurement Role Actions page.

Related Links

[Maintaining System Users and Roles](#)

Receiving Stock As a Casual User

This section discusses how to:

- Select items to receive.
- Add or change a receipt.
- Reject a shipment.
- Add comments at the receipt heading and line levels.
- Review or add asset information to an item.
- Generate tag numbers.
- Generate serial numbers.
- Enter the location for an item.
- View recorded receipts.

Pages Used to Receive Stock As a Casual User

Page Name	Definition Name	Usage
<u>Receive Items Page</u>	PV_PO_PICK_ORDERSC	Select items to receive.
<u>Receive Page</u>	PV_RECV_WPO	Add or change a receipt.
<u>Receipt Header Comments Page</u>	PV_RECV_COMMENTS	Record one or more comments at the header level of this receipt and add attachments. You cannot access this page unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS.
Standard Comments Page	PV_STD_COMM_SEC	Use this page to apply a standard comment as a comment to the receipt line or receipt header. Standard comments are frequently used comments that have been defined in the system using the Standard Comments (STANDARD_COMMENTS) and Standard Comment Type (STD_COMMENT_TYPE) components. Enter search criteria of Comment Type, Comment ID, or Description and then click the Search button to display the standard comments. Select a standard comment and click OK to apply the comment to the requisition. • Select the Standard Comments link on the Receipt Header Comments page. • Select the Standard Comments link on the Receipt Line Comments page.
Reject Shipment Page	PV_RECV_REJECT	Reject a shipment. Click the Reject Shipment link on the Receive page.
Line Details Page	PV_RECV_WPO_DETAIL	View more information about the item, all receipts from this requisition, and the PO that is used. Click the Details button on the Receive page.

Page Name	Definition Name	Usage
Receipt Line Comments Page	PV_RECV_COMMENTS	Use this page to record the condition of the shipment when it arrived at the location (good, fair, or damaged), add comments about the receipt line, and add attachments to the receipt line. You are limited to one comment and no attachments unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS. Click the Receive Comments icon on the Receive page.
<u>Asset Management Information Page</u>	RECV_WPO_AM	Review or add asset information to an item. This page is used only when the item is an asset item.
<u>Inventory Putaway Information Page</u>	RECV_WPO_PUTAWAY	Enter the location of an item.
Inventory Item Information Page	RECV_INV_ITEMS_SP	View the inventory information that is defined for this item on the Item Definition page. Click the Inventory Item Info link on the Inventory Putaway Information page.
Storage Location Search Page	RECV_STOR_LOC_SRCH	Search for a material storage location in PeopleSoft Inventory, where you can put the received items. Click the Search button on the Inventory Putaway Information page.
<u>Manage Receipts Page</u>	PV_RECV_UPDATE_REQ	View recorded receipts. Add details, return items to supplier, or cancel a receipt.

Receive Items Page

Use the Receive Items page (PV_PO_PICK_ORDERSC) to select items to receive.

Navigation:

eProcurement > **Receive Items**

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

Receive Items

You have 7 lines open for receiving

[Receive Selected](#) and go to the Receive Form.

Requisition Lines to Receive [Personalize](#) | [Find](#) | [View All](#) | [Print](#) | [Refresh](#) First 1-7 of 7 Last

Requisition Lines to Receive		Purchase Order Details									
Req BU	Requisition	Item Description	Tot Req Qty/Amt	Accepted to Date	UOM	Ship To	Ship To GLN	Attention To	Supplier	Supplier ID Number	
☐	US001	0000000092	Air Mattress, Double	10	0	EA	US001	2222222222222		BIKE-001	
☐	US001	0000000092	Aluminum Pressure Cooker	10	0	EA	US001	2222222222222		BIKE-001	
☐	US001	0000000091	Aluminum Pressure Cooker	10	0	EA	US001	2222222222222		CAMPER'S-001	
☐	US001	0000000091	Cookie's Chow Kit Utensils	10	0	EA	US001	2222222222222		CAMPER'S-001	
☐	US001	0000000090	Airbed, Queen	5	0	EA	US001	2222222222222		CAMPER'S-001	
☐	US001	0000000105	Desktop 450Mhz	10	0	EA	US001	2222222222222		BIKE-001	
☐	US001	0000000104	Monitor 17inch	10	0	EA	US001	2222222222222		BIKE-001	

[Check All](#) [Clear All](#)

[Inquire Receipts](#)

For a requisition line to appear on this page, the item must have been placed on a PO and dispatched to the supplier. You can view the requisitions that you entered and those that were purchased for you. When the entire quantity of the item has been received, the requisition line no longer appears on this page.

Requisition Lines to Receive Tab

Field or Control	Description
Receive Selected	Click to receive the requisition lines that you select on this page. The system displays the Receive page, where you can make changes to the receipt quantity, review requisition details, and add comments.
Requisition	Select the check box to the left of the line, and click Receive Selected to display the Receive page.
Item Description	Click to access the Item Description page, where you can review item details and an item image, if it's available.
Total Req Qty/Amt (total requested quantity/amount)	Displays a quantity only if one of the lines was over received and a return to supplier (RTV) was created to return the excess stock. This is the quantity that you expect to receive (the requisition quantity or the overage amount).
Accepted to Date	Displays the number of items that have been accepted to date.
Ship To	Displays the business unit to which the requisition item is going to be shipped.

Field or Control	Description
Attention To	Displays the name of the individual who should receive the items or services on this requisition line. Once the shipment is physically received, this individual should record the receipt, enabling the buyers to track the quality and promptness of the supplier.
Supplier	Displays the supplier who is supplying the item.
Check All	Click this button to select all requisition lines with the same supplier as the first line or as the line you have already selected. One receipt can include only one supplier; therefore, not all displayed lines are selected by this button.
Inquire Receipts and Manage Return to Suppliers	Click these links to display previously recorded receipts or RTVs for the requisitions. This information verifies that a receipt form or an RTV has been entered for this shipment.

Warning! Do not change the **RTV Adjust Sourcing** option after transactions have been recorded in PeopleSoft eProcurement. Changing this option may alter the quantities that appear so that they become inconsistent in the PeopleSoft eProcurement receiving and RTV transactions.

Purchase Order Details Tab

Select the Purchase Order Details tab.

Field or Control	Description
PO Qty (purchase order quantity)	Displays the quantity for this PO.
Recv Reqd (receiving required)	Displays <i>Y</i> (yes) or <i>N</i> (no) to indicate whether the item requires receiving to pay the supplier for the goods. You do not need to enter a receipt for any item that is marked with <i>N</i> .

Related Links

“Establishing Purchasing Processing Options” (PeopleSoft Purchasing)
[Understanding Purchase Order Dispatch](#)

Receive Page

Use the Receive page (PV_RECV_WPO) to add or change a receipt.

Navigation:

eProcurement > Receive Items

Search for items to retrieve, and then click the Details icon of the item to review or update.

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

Maintain Receipts

Receiving

Business Unit US001

Receipt ID 0000000007

Header Details

Receipt Status Open

Add Header Comments

Activities

Document Status

Header

Select Purchase Order

Close Short All Lines

Print Delivery Report

Run PO Receipt Accrual

Receipt Lines

More Details

Links and Status

Item / Mfg Data

Optional Input

Source Information

Personalize

Find

View All

First

1-2 of 2

Last

Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Category	Close Short	Serial	Device Track	Stock UOM	INV Status	
1	MT3000	SERVICE: Subcontracted Paintin	100.0000	EA	0.25000	100.0000	Received	CYCLING				EA		
2	LT5002	Wheel Tire, 700x23	500.0000	EA	12.25000	500.0000	Open	CYCLING				EA	Moved	

☒ Interface Receipt

☐ Run Close Short

☐ Subcontract Streamline

Interface Asset Information

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Add

Update/Display

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

Maintain Receipts

Receiving

Business Unit US001

Receipt ID 0000000007

Header Details

Receipt Status Open

Add Header Comments

Activities

Document Status

Header

Select Purchase Order

Close Short All Lines

Print Delivery Report

Run PO Receipt Accrual

Receipt Lines

More Details

Links and Status

Item / Mfg Data

Optional Input

Source Information

Personalize

Find

View All

First

1-2 of 2

Last

Line	Item	Description	PO Unit	PO ID	Line	Schedule	Original Substituted Item	Description	PO Amount	Amount Only	Dist by	PO Type	Procurement Group ID	Primary Unit	Unit Allocation Qty	Unit Allocation Amt
1	MT3000	SERVICE: Subcontracted Paintin	US001	0000000006	1	1			25.00	N	Qty	General				
2	LT5002	Wheel Tire, 700x23	US001	0000000013	1	1			6,125.00	N	Qty	Kanban				

☒ Interface Receipt

☐ Run Close Short

☐ Subcontract Streamline

Interface Asset Information

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Add

Upd

Add a new receipt of one or more PO lines and reject and inspect received quantities. Before creating a receipt, verify that the PO was dispatched.

Field or Control	Description
Receipt No (receipt number) or New Receipt	Displays the receipt ID that was assigned when the receipt was entered. If you are adding a new receipt, the words <i>New Receipt</i> appear until the page is saved. Then a receipt ID is assigned automatically.
Received Date	Enter the date that the shipment arrived. The default is today's date, but you can change it if the shipment arrived earlier.

Field or Control	Description
Add Header Comments	Select to access the Receipt Header Comments page, where you can record one or more comments at the header-level of this receipt and add attachments. This link is not visible unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS.
Reject Shipment	Click to access the Reject Shipment page, where you can reject some or all of the items that are sent to you.
Item Description	Click this link to view a detailed description and picture (if available) of the item.
Received Qty (received quantity)	Enter the quantity of the items that you received.
Clone Quantity	Click the Clone Quantity button to copy the received quantity from one line to all other lines on this form. This button saves data entry steps when you have many line items.
UOM (unit of measure)	Select the type of unit by which the item was shipped to you, for example, by box, each, and so on.
Accept Qty (accept quantity)	Displays the number of items that you are accepting. If you do not reject any items by clicking the Reject Shipment link and entering the quantity that you are rejecting on the Reject Shipment page, the system assumes that you are accepting all of the items that you received. If you rejected any items, the system automatically calculates the accepted quantity when you click OK .
	Click the Details button to access the Line Details page, where you can view more data about the item, the PO that you are receiving, and the previous and current receipts.
 (Receive Comments icon)	Select this icon to access the Receipt Line Comments page, where you can record the condition of the shipment when it arrived at the location (good, fair, or damaged), add comments about the receipt line, and add attachments to the receipt line. You are limited to one comment and no attachments unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS.
 (PO Comments icon)	Select this icon to view comments added on the purchase order at the header-level, line-level, or ship to level. To appear here, the purchase order comments must have been marked with the Show at Receipt check box.

Field or Control	Description
Asset Status	Click to access the Asset Management Information page, where you can view or change the fixed asset information, such as serial ID and asset profile ID. This link appears only if the item is designated as a fixed asset for PeopleSoft Asset Management.
Inventory Status	Click to access the Inventory Putaway Information page, where you can view or change the inventory information, such as serial ID and warehouse location. This link appears only if the item is designated as a PeopleSoft Inventory item.
 (Device Tracking icon)	Click the Device Tracking button to access the Device Tracking page.
Inquire Return to Suppliers	Click to access the Manage Return to Suppliers page, where you can view a list of suppliers from which you have canceled orders, closed orders, open orders, or shipped orders.
Inquire Receipts	Click to access the Manage Receipts page, where you can view a list of requisitions, receipt numbers, received date, PO IDs, received quantity, and status of receipts.
Procurement Group ID	(Display only) Displays the Procurement Group ID for the item upon saving the component if the purchasing group options are enabled. When saving the component, the existing rows in the RECV_LN_ASSET record are updated with the Procurement Group ID, Primary Unit, Unit Allocation Quantity, and Unit Allocation Amount). See “Setting Up Procurement Groups” (PeopleSoft Purchasing)
Primary Unit	(Display only) Displays as selected if this item is the primary unit for the Procurement Group ID, if applicable. When saving the component, all of the procurement group fields are populated on the page and the existing rows in the RECV_LN_ASSET record are updated with the Procurement Group ID, Primary Unit, Unit Allocation Quantity, and Unit Allocation Amount).
Unit Allocation Qty	(Display only) Displays upon saving the component, if applicable. If the receipt distribution quantity exceeds the allocation quantity the system repeats the first RECV_LN_ASSET row for the remainder of the allocation quantity until it totals the distribution quantity.
Unit Allocation Amt	(Display only) Displays upon saving the component, if applicable. If the receipt distribution amount exceeds the allocation amount, the system repeats the first RECV_LN_ASSET row for the remainder of the allocation amount until it totals the distribution amount.

Related Links

- “Using Device Tracking” (PeopleSoft Managing Items)
- “Understanding Receiving and Putaway Processing” (PeopleSoft Inventory)

Reject Shipment Page

Use the Reject Shipment page (PV_RECV_REJECT) to reject a shipment.

Navigation:

Click the **Reject Shipment** link on the Receive page.

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

Reject Shipment

New Receipt

Business Unit US001

Receipt Detail

Personalize | View All | First 1-2 of 2 Last

	Item Description	Received Qty	UOM	Reject Qty	Reject Reason	Reject Action	RMA Number	RMA Line
1	Alkaline Battery, D	100.0000	EA	100.0000	DAM	Return For Replac	RTV12	1
2	Medical Day Tripper Fir	100.0000	EA					

Reject some or all of the items that you are recording in this receipt by entering information about each item that you are rejecting.

Field or Control	Description
Reject Qty (reject quantity)	Enter the quantity of the item that you are rejecting. This can be all or part of the quantity that was delivered to you (the received quantity). When you enter a quantity and move out of the field, the remaining fields on this page are available for entry.
Reject Reason	Select the reason why you are rejecting the items.
Reject Action	Select how you want the supplier to correct the mistake. This is an information field; to return stock to the supplier, use the Return to Supplier page.
RMA Number (return material authorization number) and RMA Line (return material authorization line)	Enter the return material authorization number and line number that the supplier provided .

Receipt Header Comments Page

The Receipt Header Comments page and the Receipt Line Comments page use the same fields. Navigation is different and each page adds comments and attachments to a different part of the receipt.

Use the Receipt Header Comments page (PV_RECV_COMMENTS) to record one or more comments at the header level of this receipt and add attachments.

You cannot access this page unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS.

Navigation:

Click the **Add Header Comments** link on the Receive page.

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

Receipt Header Comments

Business Unit US001

Receipt Number POAP-TOL

Receipt Status Received

☒ Retrieve Active Comments Only

Retrieve

*Sort Method

Comment Time Stamp

*Sort Sequence

Ascending

Sort

Comments

Find | View All

First 1 of 1 Last

Use Standard Comments

Comment Status Active

Inactivate

☐ Show at Voucher

Associated Document

Attachment

Attach

View

Delete

From -> RCV US001-POAP-TOL

OK

Cancel

Refresh

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

Receipt Line Comments

Business Unit US001

Receipt Number POAP-TOL

Receipt Status Received

Receipt Line 1

☒ Retrieve Active Comments Only

Retrieve

*Sort Method Comment Time Stamp

*Sort Sequence Ascending

Sort

Comments

Find | View All

First 1 of 1 Last

Use Standard Comments

Comment Status Active

Inactivate

☐ Show at Voucher

Associated Document

Attachment

Attach

View

Delete

From -> RCV US001-POAP-TOL-1

OK

Cancel

Refresh

Field or Control	Description
Condition	(Receipt Line Comment page only) Select the general condition of the shipment; the options are Good , Fair , and Damaged .
 (Add a New Row icon)	Select to add a new comment field. Comments are numbered as you add them.
Use Standard Comments	Click to access the Standard Comments page (PV_STD_COMM_SEC), where you can select a standard comment to be applied as a comment to this receipt. Standard comments are frequently used comments that have been defined in the system using the Standard Comments (STANDARD_COMMENTS) and Standard Comment Type (STD_COMMENT_TYPE) components. See “Setting Up Standard Comments” (PeopleSoft Source to Settle Common Information).
 (Spell Check Comment icon)	Click to perform a spell check on the comment.
Add Attachments	Click to access the File Attachments window, where you can browse and select a file to be attached to this comment. Only one file can be attached to each comment. Once a file is attached, the Attachment group box displays the file details including file name, the user who attached it, and the date and time it was attached. The Send Supplier check box applies to each file separately.

Field or Control	Description
Show at Voucher	Select if you want this comment to appear on the voucher.
OK	Select to return to the Receive page with the comments and attachments that you have added on this page.
Cancel	Select to return to the Receive page without saving the changes that were added to this page.

Asset Management Information Page

Use the Asset Management Information page (RECV_WPO_AM) to review or add asset information to an item.

Navigation:

Click the **Asset Status** link on the Receive page.

Field or Control	Description
Select Action	Select appropriate action from the given options that has to be applied for the asset details.
Tag Number	The value for this field is generated if you select action <i>Assign Tag Ids</i> in the Select Action drop down list.
Serial ID	The value for this field is generated if you select action <i>Assign Serial Ids</i> in the Select Action drop down list.
Insert Non-Serial Row	Click to distribute non-serialized item rows to different asset management custodians and locations. This generates another asset row for the same asset management (AM) unit. If you split the AM quantity, you must reduce the earlier AM quantities for this unit. The total AM quantity for this unit must match the total quantity that you've accepted. When an item is inventory-related, you can't split a quantity of one for a serialized row.
Next Asset ID	Click to assign a temporary value of <i>AUTO-ASSIGN</i> as the line item's asset ID value. This value is replaced with the next available asset ID value when you save the receipt.
AM Business Unit (asset management unit)	Displays the PeopleSoft Asset Management business unit, where the item is capitalized.
CAP Sequence (capital acquisition planning sequence)	Displays the sequence number for the capital acquisition plan.

Field or Control	Description
Cost Type	Enter the cost type code for the receipt item if applicable. Cost types represent different components of the cost of an asset, such as materials, labor, and overhead. For example, you can differentiate between the cost of building an asset and its market value by allocating the cost of production to one cost type and the margin of profit to another cost type. Cost type, combined with the asset category and transaction code, determines the general ledger accounts into which the costs are entered.
Sel (select)	Select to display the Insert Non-Serial Row button if you want to distribute non-serialized item rows to different asset management custodians and locations.
Dist Seq (distribution sequence)	Displays the receiving distribution sequence number that is associated with the selected asset row.
Quantity	Enter the item quantity that is being distributed on the selected distribution sequence.
 (Cancel Row icon)	Click the Cancel Row button to cancel this asset schedule information. If the receipt has not been interfaced, this asset row is not interfaced and is deleted during receipt interface processing. If the receipt is interfaced, a retire asset transaction is passed to PeopleSoft Asset Management.

Related Links

“Understanding Adding and Maintaining Assets” (PeopleSoft Asset Management)

Inventory Putaway Information Page

Use the Inventory Putaway Information page (RECV_INV_ITEMS_SP) to enter the location of an item.

Navigation:

Click the **Inventory Status** link on the Receive page.

Enter or review the location in PeopleSoft Inventory where this item will be placed; record serial and lot IDs. If the item that you are receiving was marked as a PeopleSoft Inventory item (and PeopleSoft Inventory is installed), use this page to record the information that is required to put the item in inventory. The default information appears from the item definition. Change this information only if you are storing the item in a different inventory location.

Field or Control	Description
Status	Displays the receipt shipping status. The status can be <i>Open</i> , <i>Received</i> , <i>Closed</i> , <i>Canceled</i> , or <i>Hold</i> . If the status is <i>Open</i> or <i>Received</i> , then you can change the inventory distribution information on this page.
Select Action	Select appropriate action from the given options that has to be applied for the inventory putaway details.
Serial ID	The value for this field is generated if you select action <i>Assign Serial Ids</i> in the Select Action drop down list.
Lot ID	The value for this field is generated if you select action <i>Assign Lot Ids</i> in the Select Action drop down list.
Insert Non-Serial Row	Click to split out non-serialized item row quantities to different putaway locations. This generates another putaway row for the same PeopleSoft Inventory business unit. You must reduce the earlier putaway quantities for this unit if you split a putaway. The total putaway quantity for this unit must match the total quantity that you've accepted. When an item is inventory-related, you cannot split a quantity of one for a serialized row.
Distribution Line Number	Displays the distribution line number. The distribution level of the purchase order records the internal location where the stock is to be delivered.
Consigned	Select if the stock is defined as consigned goods. The costs of consigned goods are not recorded until the item is used or shipped.
Non-Owned Item	Select if the stock is defined as not owned. The costs of non-owned goods are not recorded unless they are also marked as consigned goods.
Location Code	Displays the delivery location within the shipment address to which this stock should go.

You can view and change item information and location in the inventory warehouse.

Field or Control	Description
Sel (select)	Select to display the Insert Non-Serial Row button if you need to insert a non-serial row number for this row.
Quantity	Enter the quantity for this row. The total of all the rows must equal the accept quantity on the Receipt form.

Field or Control	Description
Expiration Date	Displays the date that the stock expires. The default date is based on the item definition; you can change it.
Area	Displays the storage area of the inventory warehouse where this item will be stored. The default information here is based on the item defaults. You can change the value.
Search	Click the Search button to access a search page, where you can select the material storage location for the item in the inventory warehouse.
Lev 1, Lev 2, Lev 3, Lev 4 (level 1, level 2, level 3, level 4)	Displays the levels of the inventory warehouse (subdivisions of the Area field) in which this item will be stored. The default information is based on the item defaults. You can change the value. If PeopleSoft Inventory does not use this field, it may be blank.
Container	Enter the container ID if the inventory system uses container management (license plating). This ID can also be assigned later in PeopleSoft Inventory.

Related Links

“Understanding Receiving and Putaway Processing” (PeopleSoft Inventory)

“Defining and Maintaining Material Storage Locations” (PeopleSoft Inventory)

Manage Receipts Page

Use the Manage Receipts page (PV_RECV_UPDATE_REQ) to view recorded receipts.

Add details, return items to supplier, or cancel a receipt.

Navigation:

Click the **Inquire Receipts** link on the Receive page.

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

Manage Receipts

Find a Receipt

Show Status: All **Requisition Name:** Search Clear

Receipts Personalize | Find | View All | First 1-6 of 6 Last

Requisition	Receipt ID	Recv Date	PO ID	Net Received Quantity	Status		
0000000042	0000000006	02/12/2013	0000000002	10.0000	Moved		
White Boards	0000000005	02/12/2013	0000000003	4.0000	Moved		
Printer Equipment	0000000004	02/12/2013	0000000007	40.0000	Moved		
Laptop and Accessories	0000000003	02/12/2013	0000000223	25.0000	Moved		
0000000129	0000000002	02/12/2013	0000000035	20.0000	Moved		
0000000128	0000000001	02/12/2013	0000000035	20.0000	Moved		

[Return to Manage Requisitions](#)
[Add New Receipt](#)
[Manage Return To Supplier](#)

The maximum number of rows that are retrieved and that appear on this page can be defined on the eProcurement Installation Options page. If the search returns more than the defined number of rows, an error message appears.

Field or Control	Description
Show Status	Select to view receipts with these statuses: <i>All</i>: Receipts of any status. <i>Closed/Cancelled</i>: Receipts that have been closed or canceled. <i>Closed</i>: Receipts have been completed. No further processing is required. <i>Moved</i>: Receipts that have been entered, have passed all edits, and have been sent to PeopleSoft Inventory or Asset Management. <i>Received/Open</i>: Receipts with the status <i>Open</i> or <i>Received</i>. This is the default status.
Requisition Name	Search by the name of a specific requisition. The requisition name is the name that the requester assigned when creating the requisition. If a name was not assigned, the system uses the requisition ID as the name. This limits the search results to one specific requisition.
	Click the Details button to access the Receive page, where you can view and change this receipt.

Field or Control	Description
	Click the RTV Setup button to access the Select Receipts to Return page, where you can enter the information that is needed to return the items to the supplier. If this button is unavailable, the item is a PeopleSoft Inventory or Asset Management item, and you must <i>Move</i> the status of the receipt before you can enter an RTV.
	Click the Cancel button to access the Cancel Receipt page, where you can view a list of the items on the receipt and then either choose to cancel the receipt or return to the Manage Receipts page.

Related Links

[Setting Up Installation Options for Fluid eProcurement](#)

Returning Items to Suppliers

Several business reasons exist for initiating a supplier return. You might receive defective materials, too many items, items that were shipped in error, or items that you no longer require. When you decide to return goods to the supplier, you must enter an RTV.

This section discusses how to:

- Initiate a supplier return.
- View and change the supplier's ship-to address.
- View recorded RTV entries.

Pages Used to Return Items to Suppliers

Page Name	Definition Name	Usage
Return To Vendor	PV_RTV	Initiate a supplier return.
Item Detail	PV_RTV_RECVDS_DISP PV_RTV_ASSET_DISP PV_RTV_PO_DS_DISP	View information about a requisition, an item, and previous returns.
RTV Fees (Return to Vendor Fees)	PV_RTV_LN_FEE	Record fees that are incurred for returning items to the supplier, including restocking fees and other charges.

Page Name	Definition Name	Usage
Supplier Address	PV_RTV_ADDR_DTL	View or change the supplier's ship-to address for this return. Use this page if the supplier has a return address that is different from the ordering address.
Manage Return to Vendors	PV_RTV_UPDATE_REQ	View RTV entries that have been recorded under the user ID.

Initiating a Supplier Return

Use the Return To Vendor page (PV_RTV) to initiate a supplier return.

Navigation:

eProcurement > Receive Items

Select the **Inquire Receipts** link.

Click the **RTV** icon.

Click the **Return to Vendor** button at the top of the Select Receipts to Return page.

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

[Return To Vendor \(Supplier\)](#)

New Return To Vendor (Supplier) [RTV Defaults](#)

Entered 02/12/2013 User ID CHRISBAKER

You have requested to return to the supplier the following items. Please fill in the information below. If you have obtained a Return Material Authorization (RMA) number from the supplier, please enter it below.

Item Description	Return Quantity	Ship Quantity	*Return Action	*Return Reason	RMA Number	
White Board, 3 x 4			Replace			
Whiteboard, 5 x 8			Replace			

Shipment and Supplier Information

If you have shipped the returned quantity to the supplier, please click: [Ship RTV](#)

Ship Via

Supplier: [East Bay Office Supplies](#)

[Save Return To Vendor \(Supplier\)](#)

[Return to Manage Requisitions](#) [Return to Receiving](#) [Manage Return To Supplier](#)

You can change the text that appears on this page by using the setup instructions for the Return to Vendor page.

Field or Control	Description
Item Description	Select to access the Item Description page to view item details such as Item ID, Manufacturer's Item ID, UPN ID.
Action	Select a reject action for the returned merchandise. The selection determines the selections for the other options on this page. Values are: <i>Credit</i> (return for credit): The goods are to be returned to the supplier, and no replacement of these returned goods is requisitioned. <i>Exchange</i> (return for exchange): You are returning the item, and you want a different item to be sent to you. This option triggers a PeopleSoft Workflow event to a buyer. <i>Replace</i> (return for replacement): The returned materials will be received against the original purchase order again, after the supplier ships replacement goods for the returned items.
	Click the RTV Details button to access the Item Detail page, where you can view information about this requisition and previous returns.
	Click the Return To Vendor Fees button to access the RTV Fees page, where you can enter miscellaneous charges, such as restocking fees.
Ship RTV (Ship Return To Supplier)	Click if you have shipped all the items on this page. This option sets the shipped quantity on the RTV to equal the return quantity and changes the RTV status to <i>Shipped</i> . The RTV status must be <i>Shipped</i> before you run the RTV Reconciliation process.
Ship Via	Select the method of shipment that you are using to ship the stock back to the supplier.
Supplier	Click to go to the Supplier Address page.

Viewing and Changing the Supplier's Ship To Address

Use the Supplier Address page (PV_RTV_ADDR_DTL) to view or change the supplier's ship-to address for this return.

Use this page if the supplier has a return address that is different from the ordering address.

Navigation:

Click the **Supplier** link on the Return to Vendor page. You can find definitions for the fields and controls later on this page.

This example illustrates the fields and controls on the Supplier Address page.

Supplier Address

Supplier ID **USA0000011** East Bay Office Supplies

Return Supplier **USA0000011** East Bay Office Supplies

Location **1** Vendor with Pay Terms **30**

Contact

Override Supplier Address

Contact

Country: United States

Address 1 234 Jones St.

Address 2

Address 3

City Concord County

Postal 94522

State CA California

OK Cancel

Note: For you to change the address, the roles must contain a user role that is included under RECV_CASUAL_ALL on the eProcurement Role Actions page.

Field or Control	Description
Return to Vendor, Location, and Contact	Displays the default information from the supplier definition; you cannot change this information here.

Related Links

[Maintaining System Users and Roles](#)

Viewing Recorded RTV Entries

Use the Manage Return to Vendors page (PV_RTV_UPDATE_REQ) to view RTV entries that have been recorded under the user ID.

Navigation:

Click the **Inquire Return to Vendors** link on the Return to Vendor page.

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

Manage Return To Vendor (Supplier)s

Search Criteria

Business Unit

Buyer

Return To Vendor (Supplier) ID

Receipt No

Search

Clear

Add RTV

Reconcile RTV

Show Status

Return To Vendor (Supplier)s

Personalize | Find | View All |

First 1-5 of 5 Last

RTV ID	Item ID	Receipt No	PO No.	Supplier Name	Status	
0000000003	10003			ERNIE'S BIKE SHOP	Open	
0000000002	10014	0000000016	0000000025	TRAILBLAZERS	Open	
0000000002	10020	0000000016	0000000025	TRAILBLAZERS	Open	
0000000002	10016	0000000016	0000000025	TRAILBLAZERS	Open	
0000000001	10026	0000000005	0000000011	BIKE SHOP	Open	

Return to Manage Requisitions

Return to Receiving

Field or Control	Description
Status	Displays the status of the RTV: <i>Open:</i> The RTV form has been entered and saved. <i>Shipped:</i> All lines on the return have been shipped. An RTV line item is considered shipped when the line's shipped quantity equals the return quantity. <i>Closed:</i> All lines on the return are complete. After a return is closed, you cannot change it. <i>Cancelled:</i> The RTV has been canceled. You cannot change the RTV status to <i>Cancelled</i> if all items on the RTV have been shipped.
	Click the Display RTV Information button to access the Return to Supplier page, where you can view the information about the original RTV form. If the RTV form status is <i>Open</i>, you can change the information.

Receiving Stock As a Power User

In PeopleSoft eProcurement receiving, a power user can perform more actions than a casual user. A power user has access to many PeopleSoft Purchasing pages that are designed for receiving department personnel.

This section lists the pages used to receive stock as a power user and discusses how to view recorded receipts.

Pages Used to Receive Stock As a Power User

Page Name	Definition Name	Usage
<u>Assign Role Actions To Roles Page</u>	PV_ACTIONS	Associate necessary roles with the eProcurement role action <i>RECV_POWER</i> .
<u>Manage Receipts Page</u>	PV_RECV_UPDATE_REQ	View recorded receipts.
Process Receipts	PV_RECV_PROCESS	Choose how to process receipts.
Selected Receipt	PO_PICK_ORDERS	Select purchase orders that require inspection.
Advanced Shipment Receipts	RECV_AOLN_EC	Review advanced shipment receipt notifications.
Manage Return to Vendors	PV_RTV_UPDATE	View RTV information, add an RTV, and reconcile an RTV.
Maintain Return To Vendor- Return To Vendor	RTV	Enter RTV details, such as return quantities and source information.
Reconcile RTVs (Reconcile Return To Vendor)	RUN_POC5000	Run the RTV Reconcile process.
Select Purchase Orders	PO_PICK_ORDERS	Select POs that require a receipt. Add a new receipt of one or more PO lines; reject and inspect received quantities. Before creating a receipt, verify that the PO was dispatched.
Maintain Activity and Comments page	RECV_ACTIVITY	Record comments about the receipt.
Delivery Location	RECV_DELIVERY1	Record delivery locations.
Location Comments	RECV_DELIVERY2	Record location comments.
Ship To Comments	RECV_DELIVERY3	Record ship to comments for the receipt.
Maintain ChartFields	RECV_ACCOUNT	View the current ChartFields to be used to record this receipt. You can use this page to change the way the shipment is charged to the accounting records.

Page Name	Definition Name	Usage
Close Landed Costs	CM_LC_MANU_CLOSE	View the landed costs associated with this receipt.

Manage Receipts Page

Use the Manage Receipts page (PV_RECV_UPDATE_REQ) to view recorded receipts.

Navigation:

eProcurement > Receive Items Click on Inquire Receipts link.

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

Manage Receipts						
Search Criteria						
Received Date From	01/14/2008	To	02/13/2013	Show Status	Received/Open	
Business Unit	US001	Receipt ID		Ship To		
PO Unit		PO ID		Search	Clear	
Add New Receipt Process Receipts Inspection Review ASN Receipt Manage Return To Supplier						
Receipts						
Personalize Find View All First 1-2 of 2 Last						
Business Unit	Receipt ID	Date	PO ID	Supplier	Status	
US001	0000000042	07/10/2009	0000000206	EASTBAY-001	Received	
US001	0000000041	07/06/2009	0000000205	EASTBAY-001	Received	

You can view previously recorded receipts, add new receipts, or update details, comments, delivery information, and ChartField information. The receipt list displays all receipts that have been created for a user ID. Each row represents a separate line of the receipt so that you can see each item that has been received. If more than one item was received on the same receipt number, the same receipt number appears in multiple rows.

The roles must contain a user role that is included under RECV_POWER on the eProcurement Role Actions page.

Field or Control	Description
Business Unit	Enter the PeopleSoft eProcurement business unit that was used to enter the receipts that you want to appear.
PO Unit (purchase order business unit)	Enter the Purchasing business unit that was used to enter the receipts that you want to appear.
Add New Receipt	Click to access the Select Purchase Order page in PeopleSoft Purchasing, where you can select the PO to receive.

Field or Control	Description
Process Receipts	Click to access the Process Receipts page where you can access the receiving process in PeopleSoft Purchasing.
Inspection	Click to record inspection results. Some items require a separate inspection step. If you receive one of these items, click this link to access the Select Receipt page in PeopleSoft Purchasing, where you can find the receipt and record the results of the inspection.
Review ASN Receipt (review advanced shipment notification receipt)	Click to access the Advanced Shipment Receipts page in PeopleSoft Purchasing where you can review the receipts that were created by the Advanced Shipment Notification (ASN). The receipt might be the ASN, which is sent by the supplier.
Manage Return To Vendors	Click to access the Manage Return to Vendors page, where you can view the current RTV records.
 Details	Click the Details icon to access the Receiving page in PeopleSoft Purchasing, where you can view and change this receipt.
 Activities	Click the Activities icon to access the Maintain Activity and Comments page for receipts, where you can review or change comments about the receipt.
 Delivery Information	Click the Delivery Information icon to access the Delivery Location page in PeopleSoft Purchasing. Here you can review and enter receiving information related to shipping details, such as carrier and packing slip ID.
 ChartFields	Click the ChartFields icon to access the Maintain ChartFields page for receipts in PeopleSoft Purchasing, where you can view the accounting entries made at the time of receipt. The chart of the accounts that are used to record this receipt appears; for example, expense and inventory stock.
 Manual Close Landed Cost	Click the Manual Close Landed Cost icon to access the Close Landed Costs page in PeopleSoft Purchasing, where you can manually close receiver line charges.

Related Links

“Understanding the Requisition Business Process” (PeopleSoft Purchasing)

“Working with Landed Costs on Receipts” (PeopleSoft Purchasing)

Using Fluid User Interface for Receiving Items

Page Used to Configure Fluid Receiving

Page Used to Configure Fluid Receiving

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Setting Up Installation Options for Fluid eProcurement	PV_INSTALLATION_PV	Set up PeopleSoft eProcurement fluid installation options. Access is limited to users with the SYSTEM_ADMIN action role.

Related Links

[Using Fluid User Interface for Receiving Items](#)

Using Fluid User Interface for Receiving Items

This section discusses how to receive items using the PeopleSoft fluid user interface.

Setting Up User Authorization to Receive on Behalf of Other Requesters

This setup allows any casual receiver to receive the requisitions on behalf of any particular requester or all the requesters, depending on the configuration.

Follow these steps to set up the user authorization to receive the requisitions on behalf of other requesters:

1. Use the following existing permission lists to access these setup pages.
 - EPPV1000 – ePro Requester
 - EPPV2000 – ePro Buyer
2. Use the **eProcurement Installation Options** page (eProcurement > Administer Procurement > Maintain Overall System Options > eProcurement Installation Options) to configure the Casual Receiving Authorization.

On the **Casual Receiving Authorization** section, select **Use Requisition Authorization** for the **Receiving Options** drop-down.

For more details about Casual Receiving Authorization, see [Setting Up Installation Options for Fluid eProcurement](#).

3. Use the **Define User Preferences - Requisition Authorizations** page (Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences > Search User ID of the Receiver > Procurement > Requisition Authorizations) to provide the access to the receivers on behalf of which requesters they can receive.
 - On the **Allowed Requisition Actions** section, enable the **Full Auth for All Requesters** check box to allow the receiver to receive the requisitions on behalf of all the requesters.
 - If you want to allow the receiver to receive the requisitions on behalf of a particular requester, add that requester's User ID in the **Requesters User Authorization** section using the **Add a new row** button. Enable the **Add** authority checkbox for that requester line. The receiver can receive the requisitions on behalf of those requesters who have the Add authority.

Note: It is mandatory to add one line on the Requesters User Authorization for Receiver as well.

Based on this configuration, the receiver can filter requisitions and create receipts on the [My Requisitions Page](#) and [Create Receipt Page](#).

Pages Used to Receive Items

Page Name	Definition Name	Usage
Receipt Filters Page	PV_MOB_SRC_SCF	Search items to receive.
Create Receipt Page	PV_RECV_TX_FL	Create new receipt.
Create Receipt - Distribution Page	RECV_WPO_DIST_SCF	Enter distribution information for the receipt line items.
Receipt Header Comments Page	PV_RECV_COMM_SCF	Add comments and attachments to the receipt.
Asset Management Information Page	RECV_WPO_AM	Enter asset information for the receipt line items.
Inventory Putaway Information Page	RECV_INV_ITEMS_SP	Enter inventory putaway information for receipt line items.
Receipt Confirmation Page	PV_RECV_CONF_FL	Provides receipt details and navigation once receipt is created.
My Receipts Filters Page	PV_MOB_RECEIPT_SCF	Search the created receipts.

Page Name	Definition Name	Usage
<u>My Receipts Page</u>	PV_MOB_RECV_UPD_FL	Displays the list of created receipts to edit details, cancel the receipt, and create supplier return.
<u>Create Return Page</u>	PV_RTVPICK_RCW_FL	Create supplier return.
<u>Return Saved Confirmation Page</u>	PV_RTVSAVEDCONF_FL	Provides return details and navigation once the return is created.
<u>My Returns Page</u>	PV_MOB_RTV_UPD_FL	Displays the list of created returns to view and edit the return details.

Receipt Filters Page

Use the Receipt Filters page (PV_MOB_SRC_SCF) to search items to receive.

Navigation:

eProcurement > Create Receipt > Filter By

This example illustrates the fields and controls on the Create Receipt Filters page.

The screenshot shows the 'Filters' dialog box with the following fields and controls:

- Cancel** button (top left)
- Done** button (top right)
- Business Unit**: Text field with value 'US001' and a search icon.
- PO Number**: Text field with a search icon.
- From Date**: Date picker field with value '05/29/2024' and a calendar icon.
- To Date**: Date picker field with a calendar icon.
- Requisition ID**: Text field with a search icon.
- Requester**: Text field with a search icon.
- Ship To Location**: Text field with a search icon.
- Supplier ID**: Text field with a search icon.
- Supplier Item ID**: Text field.
- Manufacturer ID**: Text field with a search icon.
- Manufacturer's Item ID**: Text field with a search icon.
- Item ID**: Text field with a search icon.
- UPN ID**: Text field with a search icon.
- Clear** button (bottom center)

When first entering the Create Receipts page, the transactions will be displayed based on the defaulted values.

The From Date that appears on this page is based on the entered Fluid Filter Default Days on the Installation Options page. If no From Date is defined, then the default From Date is 14 days from the current date. You can also configure common filter values retention and filter search field options on the Installation Options page. To know more, refer to the Filter Retention Options section on the [Setting Up Installation Options for Fluid eProcurement](#).

Note: For performance reasons, it is highly recommended that the filter page be used when a large number of receipts are to be processed.

Depending on the Casual Receiving Authorization configuration on the ePro Installation Options Page, the search result displays if the user is a requester or if the user has authorization to create receipts for others. For more details about Casual Receiving Authorization, see [Setting Up Installation Options for Fluid eProcurement](#).

After applying the Filters, select one or more requisition check boxes on the search result and click **Receive Selected** to create receipt for that requisition lines. The system displays the [Create Receipt Page](#), where you can make changes to the receipt quantity, review requisition details, and add comments.

Create Receipt Page

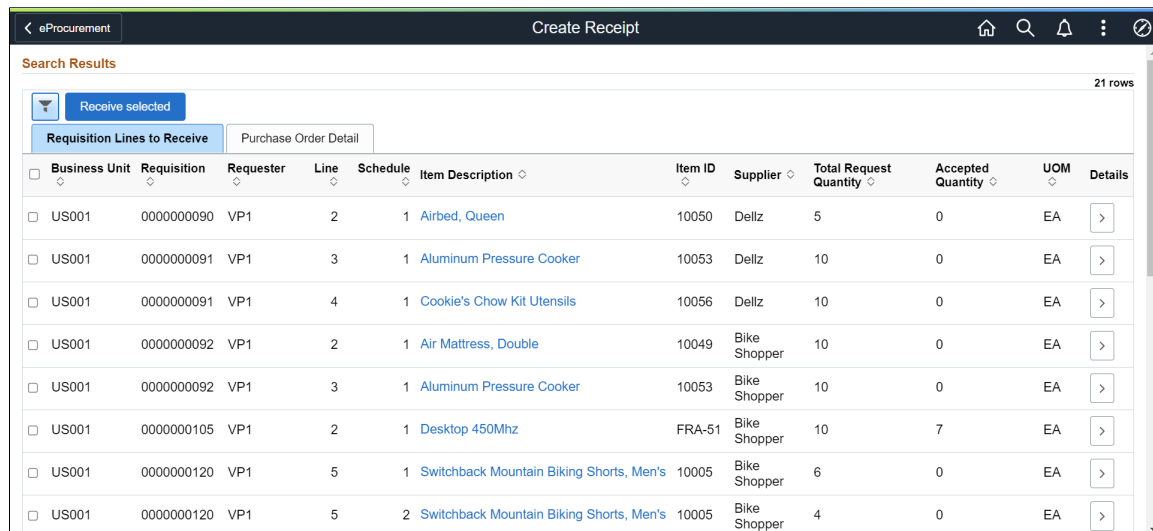
Use the Create Receipt page (PV_RECV_TX_FL) to select items to receive.

Navigation:

eProcurement > Create Receipt

Note: You can also create receipt for a specific requisition using the [My Requisitions](#) tile. If the requisition **Request State** is **Partially Dispatched** or **PO(s) Dispatched**, then Create Receipt action is available in the **Related Actions** of the requisition.

This example illustrates the fields and controls on the Create Receipt - Requisition Lines to Receive tab. You can find definitions for the fields and controls later on this page.



Business Unit	Requisition	Requester	Line	Schedule	Item Description	Item ID	Supplier	Total Request Quantity	Accepted Quantity	UOM	Details
US001	0000000090	VP1	2	1	Airbed, Queen	10050	Dellz	5	0	EA	>
US001	0000000091	VP1	3	1	Aluminum Pressure Cooker	10053	Dellz	10	0	EA	>
US001	0000000091	VP1	4	1	Cookie's Chow Kit Utensils	10056	Dellz	10	0	EA	>
US001	0000000092	VP1	2	1	Air Mattress, Double	10049	Bike Shopper	10	0	EA	>
US001	0000000092	VP1	3	1	Aluminum Pressure Cooker	10053	Bike Shopper	10	0	EA	>
US001	0000000105	VP1	2	1	Desktop 450Mhz	FRA-51	Bike Shopper	10	7	EA	>
US001	0000000120	VP1	5	1	Switchback Mountain Biking Shorts, Men's	10005	Bike Shopper	6	0	EA	>
US001	0000000120	VP1	5	2	Switchback Mountain Biking Shorts, Men's	10005	Bike Shopper	4	0	EA	>

This example illustrates the fields and controls on the Create Receipt - Purchase Order Detail tab. You can find definitions for the fields and controls later on this page.

☐	Business Unit	Requisition	Line	Schedule	PO Business Unit	Purchase Order	PO Quantity	Required	Attention To	Details
☐	US001	0000000091	4	1	US001	0000000057	10	Y		>
☐	US001	0000000092	2	1	US001	0000000056	10	Y		>
☐	US001	0000000092	3	1	US001	0000000056	10	Y		>
☐	US001	0000000105	2	1	US001	0000000058	10	Y		>
☐	US001	0000000120	5	1	US001	0000000035	6	N		>
☐	US001	0000000120	5	2	US001	0000000035	4	N		>
☐	US001	0000000120	18	1	US001	0000000278	5	Y		>
☐	US001	0000000120	18	2	US001	0000000278	5	Y		>

For a requisition line to appear on this page, the item must have been placed on a PO and dispatched to the supplier. You can view the requisitions that you entered and those that were purchased for you. When the entire quantity of the item has been received, the requisition line no longer appears on this page.

Requisition Lines to Receive Tab

Field or Control	Description
Check All	Click this check box to select all requisition lines with the same supplier. One receipt can include only one supplier; therefore, not all displayed lines are selected by this button.
Business Unit	Displays the Business Unit names for the requisition lines.
Requisition	Select the check box to the left of the line, and click Receive Selected to display the Create Receipt Page .
Requester	Displays the Requester's name for the requisition lines.
Line	Displays number of the line associated with this requisition. A requisition may have multiple lines, if there are more lines, then the requisition id will be displayed on multiple rows.
Schedule	Displays the number of the schedule associated with the line. One line can contain several schedules. if a second schedule exists for the line, the item will be displayed on two rows.

Field or Control	Description
Item Description	Click to access the Item Description page, where you can review item details and an item image, if it's available.
Item ID	Displays the Item ID for this particular requisition line.
Supplier	Displays the Supplier's name for the requisition line.
Total Request Quantity	This is the quantity that you expect to receive (the requisition quantity or the overage amount).
Accepted Quantity	Displays the number of items that have been accepted so far.
UOM (unit of measure)	Displays the type of unit requested on the requisition, for example, by box, each, and so on.
 (Details Icon)	Click the Details icon to view the item details.

Warning! Do not change the **Return Adjust Source** option after transactions have been recorded in PeopleSoft eProcurement. Changing this option may alter the quantities that appear so that they become inconsistent in the PeopleSoft eProcurement receiving and return transactions.

Purchase Order Details Tab

Select the Purchase Order Details tab.

Field or Control	Description
PO Business Unit	Displays the business unit name for the PO.
Purchase Order	Click the hyperlink to view the Purchase Order Detail.
PO Quantity (purchase order quantity)	Displays the quantity for this PO.
Required (receiving required)	Displays <i>Y</i> (yes) or <i>N</i> (no) to indicate whether the item requires receiving to pay the supplier for the goods. You do not need to enter a receipt for any item that is marked with <i>N</i> .

Field or Control	Description
Attention To	Displays the name of the individual who should receive the items or services on this requisition line. Once the shipment is physically received, this individual should record the receipt, enabling the buyers to track the quality and promptness of the supplier.

Related Links

“Establishing Purchasing Processing Options” (PeopleSoft Purchasing)

[Understanding Purchase Order Dispatch](#)

Creating Receipt

Use the Create Receipt page (PV_RECV_WPO_FL) to create new receipt.

Navigation:

eProcurement > Create Receipt

Search for items to retrieve, select the requisition line check box, and click Receive Selected.

Note: You can only receive from one supplier at a time.

This example illustrates the fields and controls on the Create Receipt - Line Information tab. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Create Receipt' page with the 'Line Information' tab selected. The page header includes navigation icons and buttons for 'Start Over' and 'Save Receipt'. The 'Receipt Header' section contains fields for Business Unit (US001), Receipt ID (NEXT), Receipt Status (Open), Received Date (07/18/2022), and Supplier Name (Dellz). Below this is a 'Header Comments/Attachments' button. The 'Receipt Lines' section shows a table with one line item: Line 1, Item ID 10050, Item Description 'Airbed, Queen', Received Quantity 5, UOM EA, Line Status Open, Accepted Quantity 5, and Rejected Quantity 0. The table has columns for Line, Item ID, Item Description, Received Quantity, UOM, Line Status, Accepted Quantity, and Rejected Quantity. There are also buttons for comments, attachments, and navigation.

Line	Item ID	Item Description	Received Quantity	*UOM	Line Status	Accepted Quantity	Rejected Quantity
1	10050	Airbed, Queen	5	EA	Open	5	0

This example illustrates the fields and controls on the Create Receipt - Source Information tab. You can find definitions for the fields and controls later on this page.

Create Receipt

Start Over Save Receipt

Receipt Header

*Business Unit US001

*Received Date 07/18/2022

Receipt ID NEXT

Supplier Name Dellz

Receipt Status Open

Header Comments/Attachments

Receipt Lines

Line Information Source Information

Line	Item ID	Business Unit	Requisition ID	Requester	Requisition Line	Requisition Schedule	PO Business Unit	Purchase Order	PO Line	PO Schedule	PO Quantity
1	10050	US001	0000000090	VP1	2	1	US001	0000000057	3	1	5

Add a new receipt of one or more PO lines and reject and inspect received quantities. Before creating a receipt, verify that the PO was dispatched.

Receipt Header

Field or Control	Description
Business Unit	Displays the Business Unit name that was assigned when the receipt was entered.
Receipt ID	Displays the receipt ID that was assigned when the receipt was entered. If you are adding a new receipt, the word <i>NEXT</i> will appear until the page is saved. Then a receipt ID is assigned automatically.
Received Date	Enter the date when the shipment is arrived. The default is today's date, but you can change it if the shipment arrived earlier.
Receipt Status	Displays the status of the receipt.
Supplier Name	Displays the name of the supplier.

Field or Control	Description
Header Comments/Attachments	Select to access the Receipt Header Comments page where you can add comments and upload one or more supporting documents. The system displays an error message if you try to load more than the number of attachments specified on the “Installation Options - Multiple Attachments Page” (Application Fundamentals) for Purchasing product. This link is not visible unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS. If there are no current comments, the comments icon on the button is empty. If comments exist, the comments icon on the button will contain lines. For more information about Header Comments/Attachments, see Receipt Header Comments Page.

Create Receipt - Line Information Tab

Select the Line Information tab

Field or Control	Description
Line	A numeric counter showing what row number this item is on. This is line will become the Receipt line number.
Item ID	Displays the Item ID for the line item.
 (Related Actions)	Click the Related Actions icon to: • Cancel Receipt Line • Rejecting Quantity • View Receipt Details
Item Description	Click this link to view a detailed description and picture (if available) of the item.
Received Quantity	Enter the quantity of the items that you received.
UOM (unit of measure)	Select the type of unit by which the item was shipped to you, for example, by box, each, and so on.

Field or Control	Description
Line Status	Displays the status of the receipt line.
Accepted Quantity	Displays the number of items that you are accepting. If you do not reject any items by clicking the Reject Shipment link and entering the quantity that you are rejecting on the Reject Shipment page, the system assumes that you are accepting all of the items that you received. If you rejected any items, the system automatically calculates the accepted quantity when you click OK .
Rejected Quantity	Displays the number of items that you are rejecting.
 (Receipt Line Comments icon)	Select this icon to access the Receipt Line Comments page, where you can record the condition of the shipment when it arrived at the location (good, fair, or damaged), add comments about the receipt line, and upload one of more attachments to the receipt line. The system displays an error message if you try to load more than the number of attachments specified on the “Installation Options - Multiple Attachments Page” (Application Fundamentals) for Purchasing product. You are limited to one comment and no attachments unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS. For more information about Receipt Line Comments, see Receipt Header Comments Page.
 (Distribution icon)	Select Distribution icon to view and edit the distribution details .
 (Details Icon)	Click the Details icon to access the Line Details page, where you can view more data about the item.
Asset Status	Click to access the Asset Management Information Page , where you can view or change the fixed asset information, such as serial ID and asset profile ID. This link appears only if the item is designated as a fixed asset for PeopleSoft Asset Management.

Field or Control	Description
Inventory Status	Click to access the Inventory Putaway Information Page , where you can view or change the inventory information, such as serial ID and warehouse location. This link appears only if the item is designated as a PeopleSoft Inventory item.
Device Tracking	Click the Device Tracking button to access the Device Tracking page.
Procurement Group ID	(Display only) Displays the Procurement Group ID for the item upon saving the component if the purchasing group options are enabled. When saving the component, the existing rows in the RECV_LN_ASSET record are updated with the Procurement Group ID, Primary Unit, Unit Allocation Quantity, and Unit Allocation Amount). See “Setting Up Procurement Groups” (PeopleSoft Purchasing)
Primary Unit	(Display only) Displays as selected if this item is the primary unit for the Procurement Group ID, if applicable. When saving the component, all of the procurement group fields are populated on the page and the existing rows in the RECV_LN_ASSET record are updated with the Procurement Group ID, Primary Unit, Unit Allocation Quantity, and Unit Allocation Amount).
Unit Allocation Qty	(Display only) Displays upon saving the component, if applicable. If the receipt distribution quantity exceeds the allocation quantity the system repeats the first RECV_LN_ASSET row for the remainder of the allocation quantity until it totals the distribution quantity.
Unit Allocation Amt	(Display only) Displays upon saving the component, if applicable. If the receipt distribution amount exceeds the allocation amount, the system repeats the first RECV_LN_ASSET row for the remainder of the allocation amount until it totals the distribution amount.
Start Over	Click to ignore the selected items to receive and start all over again the process of selecting items to receive. A message will be displayed on clicking this button alerting the user that the current data will be lost by proceeding with this step.

Field or Control	Description
Save Receipt	After completing all the actions for a receipt, click Save Receipt. The Receipt is created and Receipt Confirmation Page is displayed.

Source Information Tab

Select the Source Information tab.

Field or Control	Description
Requisition ID	Displays the Requisition ID for the line items.
Requester	Displays the Requester's ID for the line items.
Requisition Line	Displays the number of the line associated with this requisition. A requisition may have multiple lines, if there are more lines, then the requisition id will be displayed on multiple rows.
Requisition Schedule	Displays the schedule line number that includes this requisition line.
PO Business Unit	Displays the PO Business Unit name for the line items.
Purchase Order	Displays the purchase order ID linked to this sourced requisition line.
PO Line	Displays the number of the PO line associated with this item.
PO Schedule	Displays the number of the schedule associated with the line. One line can contain several schedules, if a second schedule exists for the line, the item will be displayed on two rows.
PO Quantity	Displays the quantity for this PO.
Line Status	Displays the status of the receipt line.

Field or Control	Description
 (PO Comments icon)	Select this icon to view comments added on the purchase order at the header-level, line-level, or ship to level. To appear here, the purchase order comments must have been marked with the Show at Receipt check box. If the icon on the button does not contain any lines in it, then there are no PO comments. The PO comments are display only.
 (Details Icon)	Click the Details button to access the Line Details page, where you can view more data about the item.

Related Links

“Using Device Tracking” (PeopleSoft Managing Items)

“Understanding Receiving and Putaway Processing” (PeopleSoft Inventory)

Canceling Receipt Line

Cancel the receipt creation for any requisition line item.

Navigation:

Click the **Cancel Receipt Line** link from the  Related Actions.

Select *Yes* on the confirmation pop-up.

Note: Canceling the receipt of the item cannot be reversed.

Rejecting Quantity

Use the Reject Shipment page (PV_RECV_REJECT_SCF) to reject a quantity.

Navigation:

Click the **Reject Quantity** link from the  Related Actions.

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

Receipt Line	Item Description	Received Quantity	UOM	Reject Quantity	Reject Reason	Reject Action	RMA Number	RMA Line
1	Airbed, Queen	5	EA	0		Q v		

Reject some or all of the items in this receipt by entering information about each item that you are rejecting.

Field or Control	Description
Business Unit	Displays the Business Unit name.
Receipt No	Displays the receipt number. If you are adding a new receipt, the word NEXT will appear until the page is saved. Then a receipt number is assigned automatically.
Receipt Line	Displays the receipt line number.
Item Description	Click to access the Item Description page, where you can review item details and an item image, if it's available.
Received Quantity	Displays the quantity of the items that you received.
UOM	Displays the type of unit requested on the requisition, for example, by box, each, and so on.
Reject Quantity	Enter the quantity of the item that you are rejecting. This can be all or part of the quantity that was delivered to you (the received quantity). When you enter a quantity and move out of the field, the remaining fields on this page are available for entry.
Reject Reason	Select the reason why you are rejecting the items. This is a required field.
Reject Action	Select how you want the supplier to correct the mistake. This is an information field; to return stock to the supplier, use the Return to Supplier page. This is a required field.

Field or Control	Description
RMA Number (return material authorization number)	Enter the return material authorization number that the supplier provided. This is an optional field.
RMA Line (return material authorization line)	Enter the return material authorization line number that the supplier provided. This is an optional field.

Viewing Receipt Details

Use receipt Details page (PV_RECV_TX_DTL_SCF) to view the receipt line details.

Navigation:

Click the **Receipt Details** link from the  Related Actions.

This page displays following information:

- Item Details
- Receipt Details
- Requisition Details
- Purchase Order Details

This example illustrates the fields and controls on the receipt Details page.

Details ✕

Item Details

Description Airbed, Queen	UPN Type
Item ID 10050	UPN ID
Supplier ID SCM0000002	Ship To Location US001
Supplier Item ID	Attention To
Manufacturer Name	
Manufacturing Item ID	

Expand All
Collapse All

Receipt Details

Quantity 5	
Accepted Quantity 0	
Rejected Quantity 0.00	

Requisition

Requesting Business Unit US001	
Requisition ID 0000000090	
Line Number 2	
Schedule Number 1	

Purchase Order

PO Business Unit US001	
PO Number 0000000057	
Due Date 08/08/2003	
Line Number 3	
Schedule Number 1	

Create Receipt - Distribution Page

Use Distribution page (RECV_WPO_DIST_SCF) to retrieve and select the distribution information for the line item.

Navigation:

Click the **Distribution** icon associated with the line item on the Create Receipt page.

This example illustrates the fields and controls on the Create Receipt - Distribution page (Chartfield Information). You can find definitions for the fields and controls later on this page.

Cancel
Chartfield Information Done

Schedule 1

Item Description Wireless Cycle Computer

Line Cost Received 290.00

*Allocation Type FIFO

1 row

Details
Asset Detail
Chartfields1
Chartfields2

Line	Status	Location	Qty Std UOM	Qty VND UOM	Merchandise Amt	Currency	Merch Amt Base	Business Unit Base Currency	IN Unit	Attention To	Consigned	PO Dist
1		US001	10.0000	10.0000	290.00	USD	290.00	USD	US011	Kenneth Schumacher	No	⌵

Details Tab

Select Details tab.

Field or Control	Description
Schedule	Displays the number of schedule associated with the line. One line can contain several schedules, if a second schedule exists for the line, the item will be displayed on two rows.
Item Description	Click to access the Item Description page, where you can review item details and an item image, if it's available.
Line Cost Received	Displays the amount of cost received for the line item.
Allocation Type	Displays the allocation type for the receipt. The method selected is used when the receipt quantity is less than the quantity ordered. This field appears by default from the Purchasing Definition - Business Unit Options page. Values are: • <i>FIFO (first-in-first-out)</i>: Allocations to the distribution quantities are fulfilled based on the sequence in which they are added to the purchase order schedule for purchase order receipts or the receipt line for non-purchase order receipts. • <i>Prorate</i>: The receipt amount is prorated across the distributions for the schedule based on what percentage the receipt amount is to the total purchase order schedule's distribution amount. For example, if 50% of the required items were received, each distribution line would be allocated 50 percent of its required quantity. • <i>Specify</i>: The user will specify the quantity received for each distribution line. • <i>Split Distribution</i>: Automatically assign the same Asset Grouping Sequence for both Serialized and Non-Serialized items to the same asset line across all the distributions. Each split unit will automatically be assigned the same asset grouping sequence number so that PeopleSoft Asset Management will assign the same asset ID to each fractional unit.
Line	Displays the distribution line number.
Status	Displays the status of the distribution row.
Location	Displays the location Business Unit to which the item is assigned.

Field or Control	Description
Qty Std UOM	Displays the quantity of items being distributed, expressed in the standard UOM.
Qty VND UOM	Displays the quantity of items being distributed, expressed in the supplier UOM.
Merchandise Amt	Displays the merchandise amount allocated to this distribution, expressed in the transaction currency. This value is dependent on the value entered in the Quantity field.
Currency	Displays the Currency code.
Merch Amt Base	Displays the distribution merchandise amount in the PeopleSoft General Ledger business unit currency. This value is dependent on the value entered in the Quantity field.
Business Unit Base Currency	Displays the merchandise amount for the distribution row in the base currency code.
IN Unit	The Inventory business unit where the items should be distributed when they are received.
Attention To	Displays the name of the individual who should receive the items or services on this distribution line.
Consigned	Displays if the stock is defined as consigned goods.
PO Dist	View purchase order distribution information.

Asset Detail Tab

Select Asset Detail tab.

Field or Control	Description
AM Business Unit	Identify the Asset Management business unit that is responsible for tracking asset transactions.
Profile ID	Displays the default asset profile ID associated with distribution items.

Field or Control	Description
Capitalize	Select to indicate that the requisition item is capitalized.
CAP #	The CAP identification ties the asset to a capital acquisition plan.
CAP Sequence	Displays the sequence number for the capital acquisition plan.
Employee ID	Employee ID of the custodian for this distribution item.

Chartfields Tab

Select Chartfields (Chartfields1 and Chartfields2) tab to enter Chartfield and asset management information.

For more information on Chartfields, see “Understanding PeopleSoft ChartFields” (Application Fundamentals).

Receipt Header Comments Page

The Receipt Header Comments page and the Receipt Line Comments page use the same fields. Navigation is different and each page adds comments and attachments to a different part of the receipt.

Use the Receipt Header Comments page (PV_RECV_COMM_SCF) to record one or more comments at the header level of this receipt and add attachments.

You cannot access this page unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS.

Navigation:

Click the **Add Header Comments** link on the Create Receipt page.

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

CancelReceipt Header CommentsDone

Business Unit US001

Receipt Nbr 0000000163

Receipt Status Received

Comments

Use Standard Comments

+

−

Entered On 08/05/2024 1:44:34AM

Show at Voucher

☐

Add Attachments

Attachments

1 row

	View ↑↓	Attached File ↑↓	Send to Supplier ↑↓
1	View	Attachment_1.txt	☐ −

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

Cancel

Receipt Line Comments

Done

Business Unit US001

Receipt Nbr 0000000163

Receipt Line 1

Condition

Receipt Status Received

☒ Good

☐ Fair

☐ Damaged

Comments

Use Standard Comments

+

−

Entered On 08/05/2024 3:18:53AM

Show at Voucher ☐

Add Attachments

Attachments

2 rows

	View ↑↓	Attached File ↑↓	Send to Supplier ↑↓	
1	View	Attachment_2.txt	☐	−
2	View	Attachment_2.txt	☐	−

Field or Control	Description
Condition	(Receipt Line Comment page only) Select the general condition of the shipment; the options are Good , Fair , and Damaged .
+ (Add a New Row icon)	Select to add a new comment field. Comments are numbered as you add them.
− (Delete Row icon)	Select to delete a comment field.

Field or Control	Description
Use Standard Comments	Click to access the Standard Comments page (PV_STD_COMM_SCF), where you can select a standard comment to be applied as a comment to this receipt. Standard comments are frequently used comments that have been defined in the system using the Standard Comments (STANDARD_COMMENTS) and Standard Comment Type (STD_COMMENT_TYPE) components. See “Setting Up Standard Comments” (PeopleSoft Source to Settle Common Information).
 (Spell Check Comment icon)	Click to perform a spell check on the comment.
Show at Voucher	Select if you want this comment to appear on the voucher.
Add Attachments	Click to access the File Attachments window, where you can browse and select files to be attached to this comment. You can upload one or more attachments. The system displays an error message if you try to load more than the number of attachments specified on the “Installation Options - Multiple Attachments Page” (Application Fundamentals) for Purchasing product. Once a file is attached, the Attachment group box displays the file details including file name, the user who attached it, and the date and time it was attached. The Send Supplier check box applies to each file separately.
Done	Select to return to the Create Receipt page with the comments and attachments that you have added on this page.
Cancel	Select to return to the Create Receipt page without saving the changes that were added to this page.

Asset Management Information Page

Use the Asset Management Information page (RECV_WPO_AM) to review or add asset information to an item.

This page displays general asset information such as Business Unit, Status, Receipt ID, Receipt Line, Item, and Standard UOM along with Distribution Information. Use this page to record the asset information that is required for the item.

Navigation:

Click the **Asset Status** link on the Create Receipt page.

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

Asset Management Information for Line 5

Business Unit: US001
 Status: Open
 Receipt ID: NEXT
 Receipt Line: 5
 Item: LOTSERIALTRACK
 Standard UOM: EA
 Lot Serial Track Item

Distribution Information

Distribution Line: 1
 Business Unit: US001
 Profile ID: NETWORK
 CAP #:
 Cost Type:
 Capitalize: Capitalize
 CAP Sequence:
 Employee ID:
 Distributed Quantity: 1.0000
 Merchandise Amount: 50.00

Apply to Details

Select Action: Assign Tag IDs
 Enter Starting Number:
 Overwrite existing numbers: No
 Multiplier: 1
 *Start Row: 1
 Apply

Asset Details

1 row

Dist Seq	AM Business Unit	Status	Quantity	Tag Number	Serial ID	Asset ID	Next Asset ID	Number	Profile ID	Cancel
1	US001	Open	1.0000			NEXT			NETWORK	X

Field or Control	Description
Select Action	Select appropriate action from the given options that has to be applied for the asset details.
Enter Starting Number	If you assign serial IDs, this represents the starting serial ID, which is assigned to the first detail row and is indicated by the Start Row field. If you assign tag IDs, this represents the starting tag ID, which is assigned to the first detail row and is indicated by the Start Row field.
Overwrite existing number	Select to override existing values in the detail grid rows for either the tag ID or serial ID, depending on which action is selected (Assign Tag IDs or Assign Serial IDs).
Multiplier	Enter the number multiplier. The system used this value to increment the starting number from detail row to detail row.
Start Row	This is a required field and automatically changes to a value of 1. Indicates the detail row to use as the starting point for assigning values that are determined by the starting number and multiplier.
Dist Seq (distribution sequence)	Displays the receiving distribution sequence number that is associated with the selected asset row.
AM Business Unit (asset management unit)	Displays the PeopleSoft Asset Management business unit, where the item is capitalized.
Status	Displays the asset status.

Field or Control	Description
Quantity	Enter the item quantity that is being distributed on the selected distribution sequence.
Tag Number	The value for this field is generated if you select action <i>Assign Tag Ids</i> in the Select Action drop down list.
Serial ID	The value for this field is generated if you select action <i>Assign Serial Ids</i> in the Select Action drop down list.
Asset ID	This is the asset ID assigned to the item by the organization. It is a freeform field.
Next Asset ID	Click to assign a temporary value of <i>AUTO-ASSIGN</i> as the line item's asset ID value. This value is replaced with the next available asset ID value when you save the receipt.
Number	This is the asset number assigned to the item by the organization. it is a free form field.
Profile ID	Displays the identifier for the receipt item product profile defined in PeopleSoft Asset Management.
 (Cancel Row icon)	Click the Cancel Row button to cancel this asset schedule information. If the receipt has not been interfaced, this asset row is not interfaced and is deleted during receipt interface processing. If the receipt is interfaced, a retire asset transaction is passed to PeopleSoft Asset Management.

Related Links

“Understanding Adding and Maintaining Assets” (PeopleSoft Asset Management)

Inventory Putaway Information Page

Use the Inventory Putaway Information page (RECV_INV_ITEMS_SP) to enter the location of an item.

Navigation:

Click the **Inventory Status** link on the Create Receipt page.

Enter or review the location in PeopleSoft Inventory where this item will be placed; record serial and lot IDs. If the item that you are receiving was marked as a PeopleSoft Inventory item (and PeopleSoft Inventory is installed), use this page to record the information that is required to put the item in inventory. The default information appears from the item definition. Change this information only if you are storing the item in a different inventory location.

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

Cancel

Inventory Putaway Information for Line 1

Done

Business Unit US001

Status Open

Receipt ID NEXT

Item 10017 Wireless Cycle Computer

Receipt Line 1

Standard UOM EA

Distribution Information

Distribution Line 1

Merchandise Amount 290.00

Distributed Quantity 10.0000

Merch Amt Base 290.00

Inventory Business Unit US011

Default Location AREA1

[Item Detail](#)

Consigned No

Non-Owned Item ☐ No

Putaway Information

Putaway Information

Putaway Location

Show All

Dist Seq IN Unit Status Quantity Serial ID Lot ID Supp Lot Expiration Date

1 US011 Open 10.0000

This example illustrates the fields and controls on the Inventory Putaway Information - Putaway Location tab. You can find definitions for the fields and controls later on this page.

Cancel

Inventory Putaway Information for Line 1

Done

Business Unit US001

Status Open

Receipt ID NEXT

Item 10017 Wireless Cycle Computer

Receipt Line 1

Standard UOM EA

Distribution Information

Distribution Line 1

Merchandise Amount 290.00

Distributed Quantity 10.0000

Merch Amt Base 290.00

Inventory Business Unit US011

Default Location AREA1

[Item Detail](#)

Consigned No

Non-Owned Item ☐ No

Putaway Information

Putaway Information

Putaway Location

Show All

Dist Seq IN Unit Area Storage Level 1 Storage Level 2 Storage Level 3 Storage Level 4 Container ID Kanban ID

1 US011

Putaway Information Tab

Select Putaway Information tab.

Field or Control	Description
Dist Seq (distribution sequence)	Displays the putaway distribution sequence number that is associated with the selected asset row.
IN Unit	Identifies the PeopleSoft Inventory business unit for the distribution. For non-purchase order receipts, this value appears by default from the ship to location. For purchase order receipts, this value appears by default from the purchase order distribution.

Field or Control	Description
Status	Displays the receipt shipping status. The status can be <i>Open</i> , <i>Received</i> , <i>Closed</i> , <i>Canceled</i> , or <i>Hold</i> . If the status is <i>Open</i> or <i>Received</i> , then you can change the inventory distribution information on this page.
Quantity	Enter the number of items being received for the distribution sequence. The value in this field determines the values that appear in the Distributed Quantity, Merchandise Amt, and Base Amt fields. If the receipt line is serial controlled, the quantity is not available for change. Note: The sum of the quantities on the putaway rows must equal the distributed quantity on the receipt distribution.
Serial ID	Enter the serial ID for the distribution sequence. This field is only available for entry if the Serial check box is selected for the receipt line on the Maintain Receipts - Receiving page.
Lot ID	Enter the lot ID for the distribution sequence. This field is only available when lot control is Y (yes) for the receipt line on the Create Receipt page. If the item being received for inventory is lot controlled, then a lot ID has to be specified on the receipt putaway page. If the target inventory business unit Allow Auto-Add of New Lots check box is selected, a lot ID that does not exist within inventory may be specified. Otherwise, enter an existing lot ID or select a lot ID from the list of values. If you enter a new lot ID and the business unit does not permit the automatic adding of new lots, the system validates the lot ID against the existing list. You can use the Lookup button to find existing lot IDs.
Supp Lot	Enter the identifier assigned to the item's lot by the supplier. This field is only available when the lot control status is Y (yes) for the receipt line on the Create Receipt page. The system checks for duplicate serial IDs for all serial controlled lines on a receipt document. This edit is only for serial ID assigned within the receipt document. Note: The supplier lot value defaults to the value that you enter for the lot ID.

Field or Control	Description
Expiration Date	Expiration date for a lot-controlled item. If the item is a noninventory receipt line (subcontract, expense only, or an asset only interface receipt), then this field is left blank. If the item lot ID has been assigned an expiration date, this value cannot be changed. If the item lot ID doesn't have an assigned expiration date, the item shelf-life value (if greater than zero) is added to the receipt date to calculate the expiration date. You can override this value. You must enter a value if the item's shelf life is zero.
 (Add a New Row icon)	Select to add another row.
 (Delete Row icon)	Select to remove the added row.

Putaway Location Tab

You can view and change item information and location in the inventory warehouse.

Field or Control	Description
 (Storage Location Search icon)	Click the Storage Location Search button to access a search page, where you can select the material storage location for the item in the inventory warehouse.
 (Putaway Locations icon)	Click the Putaway Locations button to access a Putaway Locations page, where you can select the Locations, Putaway Information, and Quantity of the item.
Area	Displays the storage area of the inventory warehouse where this item will be stored. The default information here is based on the item defaults. You can change the value.
Storage Level (level 1, level 2, level 3, level 4)	Displays the levels of the inventory warehouse (subdivisions of the Area field) in which this item will be stored. The default information is based on the item defaults. You can change the value. If PeopleSoft Inventory does not use this field, it may be blank.

Field or Control	Description
Container ID	Enter the container ID if the inventory system uses container management (license plating). This ID can also be assigned later in PeopleSoft Inventory.
Kanban ID	Displays the identification code assigned to the Kanban card associated with the putaway of this item. This code appears by default from the kanban details.
Sel (select)	Select to display the Insert Non-Serial Row button if you need to insert a non-serial row number for this row.
Quantity	Enter the quantity for this row. The total of all the rows must equal the accept quantity on the Receipt form.
Maximum Capacity Available	Specifies that material storage locations with the most available capacity should be evaluated as potential putaway locations first. This option is only available for business units that implement the Capacity Checking feature. With this option, the Directed Putaway function sorts the matching material storage locations by available capacity and assigns the transaction quantity to those having the most capacity first. Selecting this option results in the smallest number of suggested putaway locations, even if you permit splitting of transaction quantities.
Minimum Capacity Available	Specifies that the system should evaluate the material storage locations that have the least available capacity first. This option is only available for business units that implement the Capacity Checking feature. With this option, the Directed Putaway function sorts the matching material storage locations by available capacity and assigns the transaction quantity to those having the least capacity first. Select this option if the business rules prioritize maximum capacity utilization above putaway transaction efficiency. If you permit splitting of putaway transaction quantities, the system suggests multiple material storage locations (thus requiring multiple putaway transactions).
Putaway Rule	Specifies the putaway rule to use when no eligible material storage locations meet capacity requirements. If no valid locations are available for the transaction quantity, a message appears. You must select one default rule for each set of rules that you define.

Field or Control	Description
Split Quantity	Specifies whether the putaway transaction quantity can be divided among multiple material storage locations. This option is only available for business units that implement the Capacity Checking feature. If you do not select this option, the Directed Putaway function only returns locations that can hold the entire transaction quantity. For cross docking purposes, you can split the quantity between locations even if the putaway rule does not specify this option.
Qty Allocated	Displays the quantity that is currently hard allocated to a specific material storage location within the inventory business unit.

Related Links

“Understanding Receiving and Putaway Processing” (PeopleSoft Inventory)

“Defining and Maintaining Material Storage Locations” (PeopleSoft Inventory)

Receipt Confirmation Page

Receipt Confirmation Page (PV_RECV_CONF_FL) provides the receipt details and navigation to Create New Receipt, Edit Receipt, and My Receipts.

Navigation:

eProcurement > Create Receipt

Search for items to retrieve, select the requisition line check box, and click Receive Selected.

After completing all the actions for a receipt, click Save Receipt.

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

Receipt Confirmation

Receipt

Business Unit US001
 Receipt ID 0000000163
 Supplier Name DELLZ-001

Received Date 07/20/2022
 Receipt Status Fully Received
 Total Lines Received 1

Next Steps

Create New Receipt
 Create new receipt

Edit Receipt
 Modify this receipt

My Receipts
 Go to existing receipts

Once the receipt is created, receipt id along with receipt details are displayed on the Receipt confirmation page.

Field or Control	Description
Create New Receipt	Select Create New Receipt to go back to Create Receipt Page .
Edit Receipt	Select Edit Receipt to edit this receipt .
My Receipts	Click My Receipt to go to the fluid My Receipts Page . This page can also be accessed from the tile on the eProcurement homepage.

My Receipts Filters Page

Use the My Receipts Filters Page (PV_MOB_RECEIPT_SCF) to view the list of receipts as per the applied filters criteria.

Navigation:

Employee Self Service > eProcurement > My Receipts > Filter By

Enter the filter criteria (Receiving BU, Show Status, Received Date From, To Date, Receipt ID, Business Unit, Requisition ID, and Purchase Order ID) and click **Done**. Search result displays all the receipts as per the applied filters criteria on the [My Receipts Page](#).

The Received Date From appears on this page is based on the configuration on the Installation Options page. You can also configure common filter values retention and filter search field options on the Installation Options page. To know more, refer to the Filter Retention Options section on the [Setting Up Installation Options for Fluid eProcurement](#).

If none of the fields are selected then the Filters page will be skipped and all the transactions will be displayed on the [My Receipts Page](#).

Click **Clear** button to clear all the selected fields on the Filters page.

This example illustrates the fields and controls on the My Receipts Filters Page.

The screenshot shows a 'Filters' dialog box with a 'Cancel' button on the top left and a 'Done' button on the top right. The dialog contains the following fields and controls:

- Receiving BU:** A text input field with 'US001' and a magnifying glass icon.
- Show Status:** A dropdown menu with 'Received' selected.
- Received Date From:** A date input field with '04/26/2022' and a calendar icon.
- To Date:** A date input field with a calendar icon.
- Receipt ID:** A text input field with a magnifying glass icon.
- Business Unit:** A text input field with 'US001' and a magnifying glass icon.
- Requisition ID:** A text input field with a magnifying glass icon.
- Purchase Order ID:** A text input field with a magnifying glass icon.
- Clear:** A button located at the bottom center of the dialog.

My Receipts Page

Use the My Receipts page (PV_MOB_RECV_UPD_FL) to view and edit receipts.

You can add details, return items to supplier, or cancel a receipt.

Navigation:

Employee Self Service > eProcurement > My Receipts

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

My Receipts							
Business Unit	Receipt ID	Receipt Date	Requisition ID	Requisition Name	Purchase Order ID	Status	Supplier Name
US001	0000000148	01/02/2019	0000000104	0000000104	0000000058	Received	BIKESHOPPE-001
US001	0000000148	01/02/2019	0000000105	0000000105	0000000058	Received	BIKESHOPPE-001

The maximum number of rows that are retrieved and that appear on this page can be defined on the eProcurement Installation Options page. If the search returns more than the defined number of rows, a message appears.

Field or Control	Description
 (Create Return)	Click the Create Return button to access the Create Return page , where you can enter the information that is needed to return the items to the supplier. If this button is unavailable, the item is a PeopleSoft Inventory or Asset Management item, and you must <i>Move</i> the status of the receipt before you can enter an Return.
 (Cancel icon)	Click the Cancel button to cancel the Receipt. Note: Canceling the receipt cannot be reversed.
 (Edit icon)	Click the Edit button to access the Edit Receipt page , where you can view and modify this receipt.

Related Links

[Setting Up Installation Options for Fluid eProcurement](#)

Edit Receipt Page

Use Edit Receipt page to edit the created receipt.

Navigation:

eProcurement > My Receipts

After filtering, when Receipt rows are shown on the page, click the **Edit Receipt** icon for a row.

This page contains similar fields to the [Create Receipt Page](#).

After updating the required changes to the receipt, click **Save Receipt**. [Receipt Confirmation Page](#) appears.

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

< My Receipts

Edit Receipt

Save Receipt

Receipt Header

*Business Unit

US001

Q

Receipt ID 0000000148

Receipt Status Fully Received

Header Comments/Attachments

*Received Date

01/02/2019

Supplier Name BIKESHOPPE-001

Return Details

Receipt Lines

Line Information

Source Information

Line	Item ID	Item Description	Received Quantity	*UOM	Line Status	Accepted Quantity	Rejected Quantity	
1	FRA-51	Desktop 450Mhz	10	EA	Received	10	0	
2	FRA-03	Monitor 17inch	10	EA	Received	10	0	

Note: Use Receipt Header Comments and Receipt Line Comments to open the respective page where you can add or delete one or more supporting documents and comments. The system displays an error message if you try to load more than the number of attachments specified on the “Installation Options - Multiple Attachments Page” (Application Fundamentals) for Purchasing product.

Create Return Page

Use the Create Return page (PV_RTVPICK_RCW_FL) to initiate a supplier return.

Navigation:

eProcurement > My Receipts

After filtering, when Receipt rows are shown on the page, click the **Create Return** icon.

Note: You can also create return for a specific requisition using the [My Requisitions](#) tile. If the requisition **Request State** is **Partially Received** or **Received**, then **Create Return** action is available in the **Related Actions** of the requisition.

This example illustrates the fields and controls on the Create Return - Requisition Lines to Return tab.You can find definitions for the fields and controls later on this page.

< My Receipts

Create Return

Return

Receipt 0000000148

You have 1 items available for Return.

1 row

Return Selected

Requisition Lines to Return

Purchase Order Details

☐	Item ID	Item Description	Receipt ID	Line	Requisition ID	Line Number	Schedule Number	Received Quantity	Accepted Quantity	Received Date		
☐	1	FRA-03	Monitor 17inch	0000000148	2	0000000104	2	1	10	10	01/02/2019	>

This example illustrates the fields and controls on the Create Return - Purchase Order Details tab.You can find definitions for the fields and controls later on this page.

< My Receipts

Create Return

Return

Receipt 0000000148

You have 1 items available for Return.

1 row

Return Selected

Requisition Lines to Return

Purchase Order Details

☐	Item ID	Receipt ID	Requisition ID	Line Number	Schedule Number	PO Business Unit	Purchase Order	PO Quantity	Receiving Required	Attention To
☐	1	FRA-03	0000000148	0000000104	2	1	US001	0000000058	10	Y

Requisition Lines to Return Tab

Select Requisition Lines to Return tab.

Field or Control	Description
Return Selected	Select the requisition check box and click Return Selected to create return for that receipt line. The system displays the Create Return page, where you can provide Return Reason, Return Fees, and so on.
Item ID	Displays the Item ID for this particular line item.
Item Description	Click to access the Item Description page, where you can review item details and an item image, if it's available.
Receipt ID	Displays the receipt ID that was assigned when the receipt was created.

Field or Control	Description
Line	Displays the number of the receipt line associated with the receipt.
Requisition ID	Displays the Requisition ID for the line item.
Line Number	Displays the number of the line associated with this requisition. A requisition may have multiple lines, if there are more lines, then the requisition id will be displayed on multiple rows.
Schedule Number	Displays the number of the schedule associated with the line. One line can contain several schedules, if a second schedule exists for the line, the item will be displayed on two rows.
Received Quantity	Displays the quantity of the items that you received.
Accepted Quantity	Displays the number of item that have been accepted so far.
Received Date	Displays the date when the shipment was arrived.
 (Details Icon)	Click the Details icon to access the Line Details page, where you can view more data about the item.

Purchase Order Details Tab

Select Purchase Order Details tab.

Field or Control	Description
PO Business Unit	Displays the business unit name for the PO.
Purchase Order	Click the hyperlink to view the Purchase Order Detail.
PO Quantity	Displays the quantity for this PO.
Receiving Required	Displays Y (yes) or N (no) to indicate whether the item requires receiving to pay the supplier for the goods. You do not need to enter a receipt for any item that is marked with N.

Field or Control	Description
Attention To	Displays the name of the individual who receives the items or services on this requisition line.

Creating Return

Use the Create Return page (PV_RTV_FL) to initiate a supplier return.

Navigation:

Select the Requisition line check box and click **Return Selected**.

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

Return Header

Field or Control	Description
Entered	Displays the date the return was started.
User ID	Displays the user id for the user who is doing the return.
Supplier	Displays the name of the supplier.
Ship Via	Select the method of shipment that you are using to ship the stock back to the supplier.
Return Defaults	<u>Return Defaults</u> allows to set default actions to create a return.
Overwrite Supplier Address	Select <u>Override Supplier Address</u> button to change the supplier's ship-to address for this return.

Return Lines

Field or Control	Description
Item ID	Displays the Item ID for the line item.
 (Related Actions)	Click the Related Actions icon to: • Cancel Return Line • Enter Return Line Fees: Click Return Line Fees to access the Return Fees page, where you can enter miscellaneous charges, such as restocking fees.
Item Description	Select to access the Item Description page to view item details such as Item ID, Manufacturer's Item ID, and UPN ID.
Quantity Available for Return	Displays the number of items available for return.
Return Quantity	Enter the number of item you want to return.
Ship Quantity	Displays the quantity shipped back to the supplier. This value appears by default from the value that you entered in the Ship Qty field on the Distribution Details page. If the return line is not inventory related and there is only one distribution you can enter the ship quantity at the line level, eliminating the need to go to the distribution details page to enter the quantity value.
UOM	Select the type of unit by which the item was shipped to you, for example, by box, each, and so on.
Return Action	Select a reject action for the returned merchandise. The selection determines the selections for the other options on this page. Values are: <i>Credit</i> (return for credit): The goods are to be returned to the supplier, and no replacement of these returned goods is requisitioned. <i>Exchange</i> (return for exchange): You are returning the item, and you want a different item to be sent to you. This option triggers a PeopleSoft Workflow event to a buyer. <i>Replace</i> (return for replacement): The returned materials will be received against the original purchase order again, after the supplier ships replacement goods for the returned items.

Field or Control	Description
Return Reason	Select the reason why you are Returning the items.
RMA Number	Displays the return material authorization number that the supplier provided.
Line Status	Displays the status of the return line.
 (Return Line Comments icon)	Select to access the Return Line Comments page where you can add comments and upload one or more supporting documents. The system displays an error message if you try to load more than the number of attachments specified on the “Installation Options - Multiple Attachments Page” (Application Fundamentals) for Purchasing product.
 (Details icon)	Click the Details button to access the Item Detail page, where you can view information about this requisition.
Mark as Shipped	Click if you have shipped all the items on this page. This option sets the shipped quantity on the RTV to equal the return quantity and changes the RTV status to <i>Shipped</i> . The RTV status must be <i>Shipped</i> before you run the RTV Reconciliation process.
Save	After entering all the information, click Save to create the return. Once the return is created, Return Confirmation page appears.

Override Supplier Address

Use the Supplier Address page (PV_RTV_ADDRDTL_SCF) to view or change the supplier's ship-to address for this return.

Use this page if the supplier has a return address that is different from the ordering address.

Navigation:

Click the **Override Supplier Address** link on the Create Return page.

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

Cancel

Supplier Address

Done

Supplier ID

SCM0000002

Dellz

Return Supplier

SCM0000002

Dellz

Location

1

MAIN

Contact

Override Supplier Address

Contact

Country

USA

Q

Description

United States

Address 1

456 ELM ST.

Address 2

Address 3

City

Postal

66044

County

State

KS

Q

Description

Kansas

Note: For you to change the address, the roles must contain a user role that is included under RECV_CASUAL_ALL on the eProcurement Role Actions page.

Field or Control	Description
Return to Supplier, Location, and Contact	Displays the default information from the supplier definition; you cannot change this information here.

Related Links

[Maintaining System Users and Roles](#)

Canceling Return

Cancel the return creation for any receipt line item.

Navigation:

Click the **Cancel Return Line** link from the  Related Actions.

Select *Yes* on the confirmation pop-up.

Note: Canceling the item cannot be reversed.

Configuring Return Defaults

Use Return Defaults page (PV_MOB_RTVDFLT_SCF) to configure the default return actions.

Navigation:

Select the **Return Defaults** button on the Create Return page.

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

Cancel

Return Defaults

Done

Return Defaults

Return Adjust Source

Yes

Return Adjust Fees

Yes

Return Debit Memo

No

Notify Inventory Manager

No

Inventory Manager Notified

No

Return Adjustment Voucher

Return Dispatch Method

Print

Return Notification Method

Field or Control	Description
Return Adjust Source	Provides information about how receipt adjustments are handled. If this button is enabled, the receipt's net received quantity is adjusted if the return action is return for replacement. If this button is not enabled, the net received quantity on the receipt is not adjusted. The return quantity is always adjusted. This check box's setting appears by default from the setting on the Purchasing Definition - Business Unit Options page.

Field or Control	Description
Return Adjust Fees	Provides information about how return adjustment fees are handled. If this button is enabled, you can enter adjustment fees for the return transaction using the Return Fees page. If this button is not enabled, adjustment fees cannot be entered on the return transaction and only appear on the return transaction if there is a default value on the supplier or item-supplier relationship or if there are return-reversible miscellaneous charges on the receipt. The fees appear on the return Fees page but cannot be changed.
Return Debit Memo	If this button is enabled, an adjustment voucher or debit memo is created for all return actions according to the Return Adjustment Voucher status setting.
Notify Inventory Manager	Enable this button to notify the inventory manager that goods are ready to be shipped back to the supplier. The system generates an email notification to the manager when the Disposition field is set to <i>Ship</i> or <i>Destroy</i> for Inventory returns and the Inventory Process is <i>Manual</i>. The default value for this field is set at the business-unit level and is retrieved from the Notify Inventory Manager setting on the Purchasing Business Unit Options page. You can override the value for individual vendors by either deselecting or selecting the check box. The system uses the return inventory process option and the line disposition, to determine the notification messages that the system sends: • An inventory issue message the Inventory Process field value is <i>Manual</i> and the line disposition is <i>Ship</i>. • An inventory adjustment message when the Inventory Process field value is <i>Manual</i> and the line disposition is <i>Destroy</i>.
Inventory Manager Notified	Displays as selected to indicate that the system has sent the return notification or worklist entry to the inventory manager. When the return is saved and the Notify Inventory Manager button is enabled and Inventory Manager Notified is not enabled, the system generates the Errors and Warning notification (email, worklist entry, or both). The system enables the Inventory Manager Notified button as part of the save processing.

Field or Control	Description
Return Adjustment Voucher	Indicates the adjustment voucher option setting for the return transaction. The system looks at the Return Adjustment Voucher option setting defined on the Supplier - Location: Procurement Options page to determine the default value that appears here. The Return Adjustment Voucher option setting you define on the Supplier - Location: Procurement Options page also defaults to the Payables Definition - Voucher Build page. Values are: <i>Create Adjustment:</i> The Voucher Build process selects and creates an adjustment voucher from the return transaction. <i>No adjustment:</i> The Voucher Build process does not select or create an adjustment voucher from the return transaction. <i>Stage to Pending File:</i> The Voucher Build process selects and stages an adjustment voucher from the return transaction. The adjustment voucher is staged or held in the Quick Invoice Entry component until you update the adjustment vouchers build status to <i>To Build</i> on the Quick Invoice page.
Return Dispatch Method	Select the method by which you want to dispatch the supplier returns. The dispatch method that appears by default is defined on the Procurement Options page. Values are <i>EDX</i> (electronic data exchange), <i>Email</i> , <i>Fax</i> , and <i>Phone</i>
Return Notification Method	Select the method by which you want to notify the supplier of an return transaction that is to be dispatched. Values are <i>Email</i> and <i>Phone</i> .

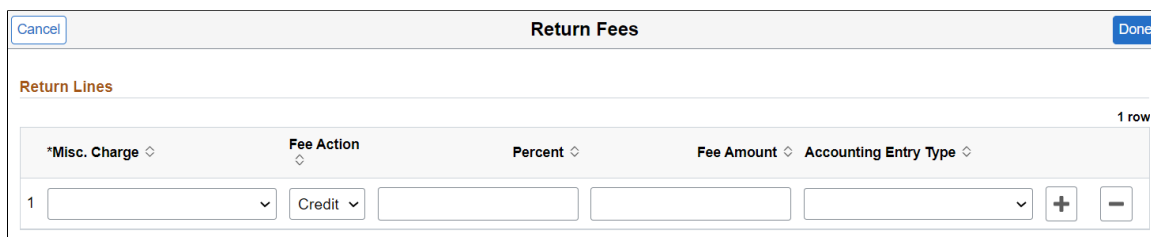
Enter Return Line Fees

Use Return Fees page (PV_RTV_LN_FEE_SCF) to enter miscellaneous charges, such as restocking fees for the line items.

Navigation:

Click the **Return Line Fees** link from the  Related Actions.

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



The screenshot shows the 'Return Fees' page with a table titled 'Return Lines'. The table has 1 row. The columns are: *Misc. Charge (dropdown), Fee Action (dropdown with 'Credit' selected), Percent (input field), Fee Amount (input field), and Accounting Entry Type (dropdown). There are '+' and '-' buttons at the end of the row. The page has 'Cancel' and 'Done' buttons at the top.

Field or Control	Description
Misc. Charge (miscellaneous charge)	Select the identification code assigned to the applicable miscellaneous charge.
Fee Action	Displays the type of fee action. Values are CR (credit) and DB (debit).
Percent	Enter the fee percentage associated with the return reason.
Fee Amount	Enter the fee amount.
Accounting Entry Type	Select the type of accounting entry associated with this fee.
 (Add a New Row icon)	Select to add another return fees line.
 (Delete Row icon)	Select to remove the return fees line.

Return Saved Confirmation Page

Return Saved Confirmation Page (PV_RTVSAVEDCONF_FL) provides the return details and navigations to Edit Return, My Returns, and My Receipts.

Navigation:

eProcurement > My Receipts > Create Return

After completing all the actions for the return, click **Save**.

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

Return Saved Confirmation

Return Header

Business Unit US001

Supplier Name BIKESHOPPE-001

Return ID 0000000005

Return Status Open

Total Lines Returned 1

Next Steps

Edit Return

Modify this return

My Returns

Go to existing returns

My Receipts

Go to existing receipts

Field or Control	Description
Edit Return	Click to edit this return .
My Returns	Click to navigate to My Returns Page .
My Receipts	Click to navigate to My Receipts Page .

My Returns Page

Use the My Returns page (PV_MOB_RTV_UPD_FL) to view Return entries that have been recorded under the user ID.

Navigation:

Employee Self Service > eProcurement > My Returns

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

eProcurement

My Returns

1 row

Return ID

Requisition

Item Description

Unit of Measure

Receipt ID

Supplier Name

Status

0000000005

0000000105

Desktop 450Mhz

Each

0000000148

BIKESHOPPE-001

Open

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Field or Control	Description
 (Filters By icon)	Click the Filters By icon to view the return Filters page. Enter the filters criteria and click Done. List of all the created returns are displayed as per the applied filter. You can also configure common filter values retention and filter search field options on the Installation Options page. To know more, refer to the Filter Retention Options section on the Setting Up Installation Options for Fluid eProcurement. If none of the fields are selected then the Filters page will be skipped and all the transactions will be displayed. Click Clear button to clear all the selected fields on the Filters page.
Return ID	Displays the return id for the line item.
Requisition	Displays the requisition id for the line item.
Item Description	Select to access the Item Description page to view item details such as Item ID, Manufacturer's Item ID, and UPN ID.
Unit of Measure	Displays the type of unit requested on the requisition, for example, by box, each, and so on.
Receipt ID	Displays the receipt id for the line item.
Supplier Name	Displays the name of the supplier for the line item.
Status	Displays the status of the RTV: <i>Open:</i> The return form has been entered and saved. <i>Shipped:</i> All lines on the return have been shipped. An RTV line item is considered shipped when the line's shipped quantity equals the return quantity. <i>Closed:</i> All lines on the return are complete. After a return is closed, you cannot change it. <i>Cancelled:</i> The return has been canceled. You cannot change the RTV status to <i>Cancelled</i> if all items on the return have been shipped.
 (Edit Return icon)	Click the Edit Return button to access the Edit Return page, where you can view the information about the original return form. If the return form status is <i>Open</i>, you can change the information.

Edit Return Page

Use this page to edit the created return.

Navigation:

eProcurement > My Returns

Click the **Edit Return** icon.

This page contains similar fields to the [Create Return](#) page.

After updating the required changes to the return, click **Save**. [Return Saved Confirmation Page](#) appears.

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

My Returns

Edit Return

Mark as Shipped

Save

Return Header

Return ID 0000000005

Entered 08/01/2022

User ID VP1

Supplier Bike Shopper

Overwrite Supplier Address

Ship Via

Return Defaults

Return Lines

Item ID	Item Description	Quantity Available for Return	Return Quantity	Ship Quantity	UOM	*Return Action	*Return Reason	RMA Number	Line Status
1	FRA-51 Desktop 450Mhz	7	3	0	EA	Replace	FAL		Open

Note: Select to accesses the Return Line Comments page where you can add comments and upload one or more supporting documents.
The system displays an error message if you try to load more than the number of attachments specified on the “Installation Options - Multiple Attachments Page” (Application Fundamentals) for Purchasing product.

Delivered Workflows for PeopleSoft eProcurement

Delivered Workflows for PeopleSoft eProcurement

This section discusses delivered workflows using the PeopleTools Workflow Technology for PeopleSoft eProcurement.

This section does not include approval workflows using the PeopleSoft Approval Framework.

see the product documentation for

PeopleTools: Workflow Technology

PeopleSoft Approval Framework

PeopleTools: Applications User's Guide

Related Links

[Understanding the Buyer Center](#)

[Understanding Requisition Changes and Change Requests](#)

Delivered Workflows for PeopleSoft eProcurement

This section discusses PeopleSoft eProcurement workflow. The workflows are listed alphabetically by workflow name.

Change Request Approval

This section discusses the Change Request Approval workflow.

Description

<i>Information Type</i>	<i>Description</i>
Event	A requester submits a change request that involves an increase in the scheduled quantity, price, or both. The requisition is submitted with changed values. Note: This approval workflow requires that you use the Maintain Workflow feature to set up roles and steps for use with the approval process.
Action	The system routes the change request to an approver for approval or denial.
Notification Method	Email and Worklist.
Email Template	Requisition change request approval submission.

Change Request Approved

This section discusses the Change Request Approved workflow.

Description

<i>Information Type</i>	<i>Description</i>
Event	An approver approves the change request.
Workflow Action	The system marks the change request as approved and routes it to a buyer for approval or denial.
Notification Method	Email and Worklist.
Email Template	Requisition change request approved.

Change Request Buyer Approval

This section discusses the Change Request Buyer Approval workflow.

Description

<i>Information Type</i>	<i>Description</i>
Event	A requester submits a change request that does not involve a change in the scheduled quantity or price. The requisition is submitted with changed values.
Action	The system triggers the PV_PO_CHNG_REQST and using the change request notification activity PV_CHNG_APPRV to send the change request for approval or denial.
Notification Method	Worklist.

Change Request Denied

This section discusses the Change Request Denied process.

Description

<i>Information Type</i>	<i>Description</i>
Event	An approver denies the change request.
Action	The system marks the change request as denied, ending the workflow process.
Notification Method	Email and Worklist.
Email Template	Requisition change request denied.

eProcurement New Item Request

This section discusses the eProcurement New Item Request process.

The eProcurement New Item Request process has two components:

- Request a new item.
- Respond to a new item request.

Requesting a New Item

Information Type	Description
Event	A requester who creates a requisition submits a New Item Request by using the Special Request - Special Item page.
Action	The system changes the New Item Request - Status to <i>Pending</i>. The system creates a worklist entry for all users who have <i>Item Notification</i> role action.
Notification Method	Worklist

Responding to a New Item Request

Information Type	Description
Event	A user who has the Item Notification role action approves or denies the new item request by using the eProcurement New Item Request page.
Action	The system sends an email to the requester who requested the new item. If the item is approved, the email includes the SetID and the Item ID. The system updates the New Item Request - Status field on the Special Request - Special Item page. If the new item request is approved, the status is changed to <i>Created</i> and the SetID and Item ID fields appear. If the new item request is denied, the status is changed to <i>Denied</i>.
Notification Method	Email
Email Template	New Item Created and New Item Denied.

Procurement Card Request Workflow

Use the Request Procurement Card page to request procurement cards for PeopleSoft eProcurement. After you enter information and save the page, workflow routes the procurement card to the correct authority for approval.

Note: There is no set up needed for PeopleSoft eProcurement's procurement card request workflow process.

When using PeopleSoft Workflow to approve procurement card requests:

1. A requester who wants a procurement card fills out the Request Procurement Card page.
2. After the page is saved, a workflow event triggers the PV_CC_REQUEST business process.
3. PeopleSoft Workflow inserts a Worklist item in the To Do List of the user assigned on the User Profile - Roles page to the workflow role of administrator.
4. When the administrator selects the Worklist entry on the To Do List, the Employee Profile - Card Data page opens.
5. The administrator can add additional information and save (or cancel) the profile.

Requisition Approval

This section discusses the Requisition Approval process.

Description

<i>Information Type</i>	<i>Description</i>
Event	A requester submits a requisition, or submits and approves a requisition if self approval is in place.
Action	The system routes the requisition for further approval, if necessary.
Notification Method	Email and Worklist.
Email Template	Requisition Approval.

Note: Requisition transaction supports the Delegation feature.
For more information on the Delegation feature, see “Understanding Delegation” (Enterprise Components).

Requisition Approval Error

This section discusses the Requisition Approval Error process.

Description

<i>Information Type</i>	<i>Description</i>
Event	An approval workflow error occurred in the approval routing. This can occur as a result of the approval process configuration or because of approval rules or criteria violations.
Action	The system routes the requisition to the administrator for resolution.
Notification Method	Email and Worklist.
Email Template	Requisition Approval Error.

Requisition Approved

This section discusses the Requisition Approved process.

Description

<i>Information Type</i>	<i>Description</i>
Event	The requester approves the requisition and no further approvals are required.
Workflow Action	The system marks the requisition as approved.
Notification Method	Email.
Email Template	Requisition Approved.

Requisition Denied

This section discusses the Requisition Denied process.

Description

<i>Information Type</i>	<i>Description</i>
Event	An approver denies the requisition header.

Information Type	Description
Action	The system marked the requisition as denied, and stops the workflow process.
Notification Method	Email.
Email Template	Requisition Denied.

Requisition Escalation

This section discusses the Requisition Escalation process.

Description

Information Type	Description
Event	An approver has not responded to a requisition within the allotted time.
Action	The system notifies the approver and the approver's supervisor and routes the requisition to the step.
Notification Method	Email and Worklist.
Email Template	Requisition Escalation.

Requisition Line Approval

This section discusses the Requisition Line Approval process.

Description

Information Type	Description
Event	A requester submits a requisition for approval, or an approver approves the requisition line.
Action	The requisition line is routed for further approval.
Notification Method	Email and Worklist.

Information Type	Description
Email Template	Requisition Line Approval.

Requisition Line Approved

This section discusses the Requisition Line Approved process.

Description

Information Type	Description
Event	A requester or approver approves a requisition line and no further approvals are required.
Action	The system marks the requisition line as approved.
Notification Method	Email.
Email Template	Requisition Line Approved.

Requisition Line Denied

This section discusses the Requisition Line Denied process.

Description

Information Type	Description
Event	An approver denies a requisition line.
Action	The system marks the requisition line as denied.
Notification Method	Email.
Email Template	Requisition Line Denied.

Requisition Line Review

This section discusses the Requisition Line Review process.

Description

<i>Information Type</i>	<i>Description</i>
Event	A user submits a requisition line for approval or approves the requisition line.
Action	The system routes the requisition to a reviewer.
Notification Method	Email and Worklist.
Email Template	Requisition Line Review.

Requisition Review

This section discusses the Requisition Review process.

Description

<i>Information Type</i>	<i>Description</i>
Event	The requisition header is submitted for approval or is approved by requester and is routed to a user defined as a reviewer.
Action	The system routes the requisition to a reviewer.
Notification Method	Email and Worklist.
Email Template	Requisition Review.

Return to Vendor Exchange Notification Workflow

The Return to Vendor (RTV) Exchange workflow process (PV_RTV_EXCHANGE) delivered with PeopleSoft eProcurement lets goods be returned to suppliers and exchanged for other items. The RTV process ensures that an exchange is completed properly by notifying the buyer that it has been entered.

Note: No setup is needed for the PeopleSoft eProcurement RTV Exchange workflow process.

When using Return to Vendor Exchange Workflow to notify buyers:

1. A requester who wants to exchange an item completes an RTV and selects *Exchange*.
2. When the RTV is saved, a workflow event triggers the PV_RTV_EXCHANGE business process. (This event is only triggered if the RTV action is *Exchange*.)

3. PeopleSoft Workflow retrieves the purchase order business unit, purchase order ID, and buyer ID from the RTV
4. PeopleSoft Workflow inserts a Worklist item in the buyer's To Do List.
5. The buyer selects the Worklist entry, opening the PO.
6. The buyer can make modifications or add another PO to record the exchange.

See the product documentation for

PeopleTools: Workflow Technology

Chapter 24

PeopleSoft eProcurement Reports

PeopleSoft eProcurement Reports: General Description

This table lists the PeopleSoft eProcurement reports, sorted alphanumerically by report ID. If you need more information about a report, refer to the report details at the end of this section.

Report ID and Report Name	Description	Navigation	Run Control Page
AP_VNDRPRE Loads Vendor Detail Record	The process that populates Vendor Details for generation of APY3000	Accounts Payable > Reports > Supplier > Supplier Detail > Supplier Detail Listing	RUN_APY3000
AP_VNDRPRGE Purge Vendor Detail Report Tbl	Purge the Vendor Detail Reporting Table after Crystal Report APY3000- has executed.	Accounts Payable > Reports > Supplier > Supplier Detail > Supplier Detail Listing	RUN_APY3000
APX1090 Match Exceptions Report	Lists the match exceptions with voucher data, purchase order data, receiver data, and match error information. (BI Publisher)	eProcurement > Inquiries and Reports Click the Match Exceptions link to access the Match Exceptions page.	RUN_APY1090
APX3000 Supplier Detail Listing Report	Lists suppliers by status along with their associated detail data including address information and payment options. (BI Publisher)	eProcurement > Inquiries and Reports Click the Supplier Detail Listing link to access the Supplier Detail Listing page.	RUN_APY3000
APX3001 Supplier Summary Listing Report	Lists the suppliers by status along with basic summary information. (BI Publisher)	eProcurement > Inquiries and Reports Click the Supplier Summary Listing link to access the Supplier Summary Listing page.	RUN_APY3001

Report ID and Report Name	Description	Navigation	Run Control Page
POX1100 Requisition to PO XREF Report	Provides information about selected requisitions and the purchase orders that were created from them. (BI Publisher)	eProcurement > Inquiries and Reports Click the Requisition to PO Xref link to access the PO/ Requisition Xref page.	RUN_POY1100
POX4006 Expediting Report by Buyer	Provides purchase order details such as late days and due date sorted by buyer. Use it to help determine which purchase orders may require expediting. (BI Publisher)	eProcurement > Inquiries and Reports Click the Expediting Report link to access the Expediting Report page.	RUN_POY4005
POX4007 Expediting Report by Supplier	Provides purchase order details such as late days and due date sorted by supplier. Use it to help determine which purchase orders may require expediting. (BI Publisher)	eProcurement > Inquiries and Reports Click the Expediting Report link to access the Expediting Report page.	RUN_POY4005
POX4008 Expediting Report by Due Date	Provides purchase order details such as late days and due date sorted by due date. Use it to help determine which purchase orders may require expediting. (BI Publisher)	eProcurement > Inquiries and Reports Click the Expediting Report link to access the Expediting Report page.	RUN_POY4005
POX4010 PO Listing by PO Date	Provides purchase order information sorted by purchase order date. (BI Publisher)	eProcurement > Inquiries and Reports Click the PO Listing Report link to access the Listings page.	RUN_POY4010
POX4011 PO Listing By Supplier	Provides purchase order information sorted by supplier.	eProcurement > Inquiries and Reports Click the PO Listing Report link to access the PO Listings page.	RUN_POY4010
POX4012 PO Listing By Buyer	Provides purchase order information sorted by buyer.	eProcurement > Inquiries and Reports Click the PO Listing Report link to access the PO Listings page.	RUN_POY4010

Report ID and Report Name	Description	Navigation	Run Control Page
POX4013 PO Listing By Status	Provides purchase order information sorted by status.	eProcurement > Inquiries and Reports Click the PO Listing Report link to access the PO Listings page.	RUN_POY4010
POX4020 Order Status By Supplier	Provides purchase order status information sorted by supplier.	eProcurement > Inquiries and Reports Click the PO Status Listing to access the PO Status Listing page.	RUN_POY4020
POX4021 Order Status by Item	Provides purchase order status information sorted by item.	eProcurement > Inquiries and Reports Click the PO Status Listing to access the PO Status Listing page.	RUN_POY4020
POX4030 PO Detail Listing By PO Date	Provides detailed purchase order information sorted by purchase order date. (BI Publisher)	eProcurement > Inquiries and Reports Click the PO Details Listings link to access the Detail Listings page.	RUN_POY4030
POX4031 PO Detail Listing By Supplier	Provides detailed purchase order information sorted by supplier. (BI Publisher)	eProcurement > Inquiries and Reports Click the PO Details Listings link to access the Detail Listings page.	RUN_POY4030
POX4032 PO Detail Listing By Buyer	Provides detailed purchase order information sorted by buyer. (BI Publisher)	eProcurement > Inquiries and Reports Click the PO Details Listings link to access the Detail Listings page.	RUN_POY4030
POX4040 PO Schedule Listing By PO Date	Provides purchase order schedule information such as ship to and due date sorted by purchase order date.	eProcurement > Inquiries and Reports Click the PO Schedules Listing to access the PO Schedules Listing page.	RUN_POY4040

Report ID and Report Name	Description	Navigation	Run Control Page
POX4041 PO Schedule Listing By Supplier	Provides purchase order schedule information such as ship to and due date sorted by supplier.	eProcurement > Inquiries and Reports Click the PO Schedules Listing to access the PO Schedules Listing page.	RUN_POY4040
POX4042 PO Schedule Listing By Buyer	Provides purchase order schedule information such as ship to and due date sorted by buyer.	eProcurement > Inquiries and Reports Click the PO Schedules Listing to access the PO Schedules Listing page.	RUN_POY4040
POX4100 PO to Requisition XREF Report	Provides information about selected purchase orders and the requisitions that they were created from. (BI Publisher)	eProcurement > Inquiries and Reports Click the PO to Requisition Xref link to access the Requisition/PO Xref page.	RUN_POY4100
POX5001 Receiver Summary Report	Provides a summary listing of receipts within a specified date range. (BI Publisher)	eProcurement > Inquiries and Reports Click the Receipt Summary link to access the Receipt Summary page.	RUN_POY5001
POX5010 Receiver Ship To Detail Report	Provides a summary listing of receipts shipments within a specified date range. (BI Publisher)	eProcurement > Inquiries and Reports Click the Receipt Ship To Detail link to access the Receipt Ship To Details page.	RUN_POY5101
POX5020 Receiver Account Detail Report	Provides a summary listing of receipts with account distribution. (BI Publisher)	eProcurement > Inquiries and Reports Click the Receipt Account Details link to access the Receipt Account Details page.	RUN_POY5020

Report ID and Report Name	Description	Navigation	Run Control Page
PVX1000 Requisition Department Summary	Provides information about the accounting distribution for each requisition. For each requisition, the accounting distribution lines are summarized by GL (general ledger) business unit, account, and department. This report also lists the requisition name, requester, amount, and date. (BI Publisher)	eProcurement > Inquiries and Reports Click the Requisition Costing Summary link to access the Requisition Costing Summary page.	RUN_PVY1000
PVX1100 Requisition Department Detail	Provides information about the accounting distribution for each requisition down to the distribution level. By requisition distribution line, each accounting distribution is listed, including GL business unit, account, department, and amount.	eProcurement > Inquiries and Reports Click the Requisition Cost Distribution Detail link to access the Requisition Cost Distribution Detail page.	RUN_PVY1100
PVX2000 Catalog Item Usage	Provides information about the items ordered on requisitions. Sorted by business unit and item catalog, this report lists the items ordered and other information, including quantity ordered, average price, currency, and number of requisitions ordering this item. (BI Publisher)	eProcurement > Inquiries and Reports Click the Category Item Usage link to access the Category Item Usage page.	RUN_PVY2000
PVX4000 PO Item Category Usage	Provides information about the items ordered for the purchase orders within one business unit and one item catalog. This report lists the total quantity ordered of each item and other information, including item ID, item description, item category description, category code, supplier ID, supplier name, contract ID (if any), average price, total amount, currency, and percentage of total. This report is sorted by catalog ID and category code. (BI Publisher)	eProcurement > Inquiries and Reports Click the PO Item Category Usage link to access the PO Item Category Usage page.	RUN_PVY4000

Report ID and Report Name	Description	Navigation	Run Control Page
PVX4001 PO Item Cat Usage by Supplier	Provides information about the items ordered for the purchase orders within one business unit and one item catalog. This report lists the total quantity ordered of each item and other information, including item ID, item description, item category description, category code, supplier ID, supplier name, contract ID (if any), average price, total amount, currency, and percentage of total. This report is sorted by supplier ID. (BI Publisher)	eProcurement > Inquiries and Reports Click the PO Item Category Usage link to access the PO Item Category Usage page.	RUN_PVY4000
PVX5000 Contract Price Discrepancy Report	Provides information on punchout and contract price discrepancy.	eProcurement > Inquiries and Reports Click the Contract Price Discrepancy Report link to access the Contract Price Discrepancy Report page.	RUN_PVX5000
VNDRDTL	This is a Process Scheduler Job that runs the following process: • AP_VNDRPRE • APX3000 • AP_VNDRPRGE	Accounts Payable > Reports > Supplier > Supplier Detail > Supplier Detail Listing	RUN_APY3000

PeopleSoft eProcurement Selected Reports: A to Z

This section provides detailed information about individual reports, including important fields and tables accessed. The reports are listed alphanumerically by report ID.

Common Elements Used

Field or Control	Description
From Date and Through Date	Enter the dates to provide the date range for the requisitions that you want to include in the report. If you leave these fields blank, all requisitions are included regardless of their dates.

<i>Field or Control</i>	<i>Description</i>
SetID	Enter the TableSet ID of the items that you want to include on the report. A SetID is required for this report.

PVX2000 - Catalog Item Usage Report

<i>Field or Control</i>	<i>Description</i>
Tree Name	Enter the name of the item catalog (PeopleSoft tree) that you want to include in the report.

PVX4000 - PO Item Category Usage Report

<i>Field or Control</i>	<i>Description</i>
Catalog ID	Enter the name of the item catalog (PeopleSoft tree) that you want to include on the report. A catalog ID is required for this report.
Tree Node	Enter the name of the PeopleSoft tree node to limit this report to items from this node.
Supplier ID	Enter a supplier ID if you want to limit this report to the purchase orders generated for this supplier.

