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# Product Service Category

## Functional Overview

### Ellipse EAM® 9.0.12

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# Introduction

## Purpose

This functional overview describes enhancements to the Product Service Category functionality being introduced in Ellipse 9.0.12. This document describes the changes for this release and component differences from previous releases. It also explains how to configure and use the new functionality.

The enhancements in this release support:

- An improved Product Service Category search.
- An extension to Product Service Category to enable the defining of defaults to a Product Service Category.

This document should be read in conjunction with the Requisition Enhancements function overview.

## Business Benefits

These enhancements provide the following customer business benefits:

Define Purchase Requisition defaults – A Product Service Category can now be associated with additional information that can be used in the Requisitioning process, minimising the amount of information the requisitioner must know and increasing user efficiencies.

The following fields can be associated with a Product Service Category. If the Product Service Category is nominated for an item on a Purchase Requisition, the following can be applied:

- Default Expense Element
- Default Purchasing Officer / Purchasing Team
- A set of suppliers, along with an auto order limit for each supplier, such that if a nominated supplier is selected on a Purchase Requisition, and the Requisition item amount is within the auto order limit, and the system has been properly configured, then upon requisition approval an order will be created automatically.

Simplified Search – The Product Service Category search has been simplified by combining into one field the following fields: Category Id, Parent Category Id, Category Name Search Method, Category name, Category Description Search Method, and Category Description. The new field, Product Service Category Id, provides an equivalent search across all fields.

## Business Rules

The following business rule applies for this functionality:

- Product Service Category Defaults for a Purchase Requisition do not have a district defined, as they may be assigned to a Product Service Category globally or for more than one district. Any district-specific validation required will be applied when the Product Service Category is used when creating a purchase requisition in MSERQL. When the default information is invalid for the district, the order cannot be automatically created.

## Functional Enhancements

The enhancements introduced within this release support the expanded functionality of the MSE1E1 - Product Service Category application, and the new MSE1DS - Category Default Set application.

The new application allows for the creation and maintenance of a Category Default Set. These defaults can be assigned to a Product Service Category for use within certain business processes. Use of these defaults when creating goods and service requisitions enables the automatic purchasing of the goods or service items without the user having to know all the necessary details. This makes the purchasing process much easier and more efficient.

The enhancements within this functional overview document detail the search/create/update/delete of the Category Default Sets and assigning the defaults to Product Service Categories either globally or for a nominated district. It includes the following applications:

- MSE1E1 – Product Services Category
- MSE1DS - Category Default Set

Refer to the Requisitioning Functional Overview, also included in this release, for further details on the use of these defaults in the purchase requisitioning business process.

## MSE1E1 – Product Service Category

The Product Services Category screens have been enhanced and remodelled to support the requisitioning enhancements. The screens have an improved search capability for the Product Service Category, and include new functionality to assign, unassign, search, and display the defaults from any allocated Category Default Sets. Using the new actions within the search screen, a user can assign or unassign a Category Default Set either globally or for a nominated district.

Search screen:

The previous search fields on the search screen have been combined into one easy-to-use Product Service Category Dropdown. In addition, users can search for the Category Default Set or its defaults assigned to a Product Service Category. The following fields can be used to search for a Product Service Category:

- Product Service Category – Type ahead to utilise the Product Service Category Dropdown. Or enter free text to do a contains search on Product Service Category Name and Description.

- Category Default Set – Type ahead to utilise the Category Default Set drop-down. The drop-down list will be filtered with the data entered.
- District Code – Type ahead to utilise the District drop-down. The drop-down list will be filtered with the data entered.
- Search Option – Select one of the following:
  - 'Global and District' – use to return all records for both globally and district-assigned category default sets.
  - 'Global' – use to return the Product Service Category hierarchy without the district assigned category default sets.
  - 'District' – use to return all Product Service Categories with a Category Default Set assigned for the nominated district, or all districts when the district is blank.
- Expense Element – Users can look up Element Elements using MSM931A - Review Expense Element.
- Supplier – Type ahead to utilise the Supplier drop-down. The drop-down list will filter the existing suppliers with the data entered. Users can look up Suppliers using MSE200 - Search Supplier
- Purchasing Officer – Type ahead to utilise the employee drop-down. The drop-down list will filter the existing employees with the data entered. Users can look up employees using MSE81H - Employee Search. Purchasing Officer and Purchasing Team are mutually exclusive; when the Purchasing Officer has been entered, the Purchasing Team will be disabled.
- Purchasing Team – Users can look up Teams using MSETMS - Search Team. Purchasing Officer and Purchasing Team are mutually exclusive; when the Purchasing Team has been entered, the Purchasing Officer will be disabled.

When the Search button is selected, all Product Service Categories containing the entered search criteria will be returned to the results grid.

**Note:** The Product Service Category hierarchy is defined Globally. To see the Product Service Category hierarchy, use the Search Option of 'Global'. Category Default Sets can be assigned to a product service category globally or for a nominated district.

The search results grid display can be customised by checking or unchecking the columns for the data to be displayed.

Show or hide columns

Show

Lock

Column

Row Number

Category Default Set

Category Description

Category Name

District

Expense Element

Parent Category Id

Product Services Category Id

Purchasing Officer

Purchasing Team

Both:Code first

Both:Code first

Both:Code first

Both:Code first

OK

Cancel

Actions:

Using the new actions within the search screen, a user can Assign or Unassign a Category Default Set(s) either globally or for a nominated district.

MSE1E1 - Search Product Services Category

Q Search

Q New Search

+ New

Process Model

Screen Defaults

Product Services Category Id

53

Category Default Set

HARDWARE AND ABRASIVES - HARDWARE AND ABRASIVES

District

Expense Element

Purchasing Officer

Search Option

Global and District

Supplier

Purchasing Team

Assign Category Default Set

Unassign Category Default Set

Product Services...	Parent Category Id	Category Name	Category Description	Category Default Set	District
<input type="checkbox"/>	53	HARDWARE AND ABRASIVES	HARDWARE AND ABRASIVES		
<input type="checkbox"/>	5305	SCREWS	SCREWS		
<input checked="" type="checkbox"/>	5306	BOLTS	BOLTSBOLTS 1BOLTS 2BOLTS 3BOLTS 4		
<input checked="" type="checkbox"/>	5307	STUDS	STUDS		
<input checked="" type="checkbox"/>	5310	NUTS AND WASHERS	NUTS AND WASHERS		
<input checked="" type="checkbox"/>	5315	NAILS,KEYS AND PINS	NAILS,KEYS AND PINS		
<input checked="" type="checkbox"/>	5320	RIVETS	RIVETS		
<input type="checkbox"/>	5325	FASTENING DEVICES	FASTENING DEVICES		
<input type="checkbox"/>	5330	PACKING AND GASKET	PACKING AND GASKET MATERIALS		
<input type="checkbox"/>	5331	O-RING	O-RING		
<input type="checkbox"/>	5335	METAL SCREENING	METAL SCREENING		
<input type="checkbox"/>	5340	MISCELLANEOUS HARDWARE	MISCELLANEOUS HARDWARE		
<input type="checkbox"/>	5341	BRACKETS	BRACKETS		
<input type="checkbox"/>	5342	HARDWARE,WEAPON SYSTEM			
<input type="checkbox"/>	5345	DISKS AND STONES,ABRASIVE	DISKS AND STONES,ABRASIVES		
<input type="checkbox"/>	5350	ABRASIVE MATERIALS	ABRASIVE MATERIALS		
<input type="checkbox"/>	5355	KNOBS,POINTERS	KNOBS,POINTERS		
<input type="checkbox"/>	5360	COIL,FLAT AND WIRE SPRING	COIL,FLAT AND WIRE SPRINGS		

Assign Category Default Set

Users can select one entry or multiple entries from the results grid to Assign a Category Default Set.

**Note:** When a user selects an item that already has a Category Default Set assigned, the Category Default Set will be overwritten with the new Category Default Set.

Entry of the Category Default Set is mandatory. To assign the Category Default Set globally, leave the district blank.

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**Note:** A Product Service Category can have one Category Default Set allocated globally. They can also have one Category Default Set assigned per district.

Entry of the District will assign the Category Default for the nominated district. These defaults will only be used in business processes performed for the nominated district. District-assigned defaults will be used within the business processes before the Globally assigned defaults.

**Note:** A category default set can be created for a specific district and can be allocated to that district when assigned to the Product Service Category.

### Unassign Category Default Set

Users can select one entry or multiple entries from the results grid to Unassign a Category Default Set. When an entry is selected, the user will be asked to confirm before the defaults are unassigned.

**Note:** A Category Default Set cannot be deleted from MSE1DS - Category Default Set while it is assigned to a Product Service Category.

### Detail screen:

Supplier Code	Auto Order Limit	Currency	Preferred Supplier
BLACK - Blackwoods	1,000.00	AUD - Australian Dollar	<input checked="" type="checkbox"/>
BUNFV - Buntings - Fortitude Valley	0.00	AUD - Australian Dollar	<input type="checkbox"/>

The existing Product Service Category Id, Name, Parent Category Id, and Description have not been modified and functionality remain the same.

**Note:** The Product Service Category Id, Parent Category Id, Name and Description are defined once. They are not copied to a district definition when a category default set is assigned.

The following fields have been added to the Product Service Category Detail screen. These new fields are disabled from edit and are informational only to show the default values of the assigned category default set.

- Category Default Set – name of the category default set.
- District Code – when viewing the globally assigned category default set, this field will be blank.
- Expense Element
- Supplier. Each Supplier can also have:
  - Auto Order Limit – the numeric value that will be applied to the requisition item total amount when automatically living a purchase requisition to a purchase

order within MSERQL - requisition. When zero, all purchase order items for the supplier are required to be approved.

- Preferred Supplier – The preferred supplier to be used when the supplier list referenced.
- Purchasing Officer
- Purchasing Team

**Note:** Category Defaults Sets are not validated as district-specific when created. Those default fields that require additional validation for a district (e.g., expense element, or supplier business information) will be validated for the district when they are used within a business process. Category Default Sets can be assigned globally or for a nominated district(s). Defaults assigned for a district will be used before the Globally assigned defaults.

## MSE1DS – Category Default Set

The new application MSE1DS - Category Default Set has been developed to enable the allocation of defaults that can be assigned to a Product Services Category. This minimises human intervention when creating purchase requisitions for goods and service items using the new MSERQL - Requisition processes.

A search and detail screen have been provided with this development.

Search screen:

The screenshot shows the MSE1DS - Search Category Default Set application. At the top, there is a search bar with a magnifying glass icon, a 'New Search' button, and a 'Screen Defaults' button. Below these are four dropdown menus: 'Category Default Set', 'Expense Element', 'Supplier', and 'Purchasing Officer'. Each dropdown menu has a small arrow icon next to it. Below the dropdowns is a table with the following columns: 'Category Default Set', 'Category Default Set Description', 'Expense Element', 'Purchasing Officer', and 'Purchasing Team'. The table is currently empty.

The following fields can be used to search for a Category Default Set:

- Category Default Set – Type ahead to utilise the Category Default Set drop-down. The drop-down list will be filtered with the data entered.
- Expense Element – Users can look up Element Elements using MSM931A - Review Expense Element.
- Supplier – Type ahead to utilise the Supplier drop-down. The drop-down list will filter the existing suppliers with the data entered. Users can look up Suppliers using MSE200 - Search Supplier
- Purchasing Officer – Type ahead to utilise the employee drop-down. The drop-down list will filter the existing employees with the data entered. Users can look up employees using MSE81H - Employee Search. Purchasing Officer and Purchasing Team are mutually

exclusive; when the Purchasing Officer has been entered, the Purchasing Team will be disabled.

- Purchasing Team – Users can look up Teams using MSETMS - Search Team. Purchasing Officer and Purchasing Team are mutually exclusive; when the Purchasing Team has been entered, the Purchasing Officer will be disabled.

When the Search button is selected, all category default sets containing the entered search criteria will be returned to the results grid.

The search results grid display can be customised by checking or unchecking the columns for the data to be displayed.

Show	Lock	Column
<input type="checkbox"/>	<input type="checkbox"/>	Row Number
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Category Default Set
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Category Default Set Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Expense Element
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Purchasing Officer
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Purchasing Team

Both: Code first ▼

OK Cancel

Detail screen:

MSE1DS - Search Category Default Set MSE1DS - Update Category Default Set

Submit Refresh New Save As Delete Open New Search

Category Default Set: HARDWARE R100  
Description: CATEGORY DEFAULTS FOR HARDWARE IN DISTRICT R100

Expense Element: 00001  
Purchasing Officer: SSCOTT  
Purchasing Team: SCOTT, STEVE

Suppliers

Supplier Code	Auto Order Limit	Currency	Preferred Supplier
BLACK - Blackwoods	1,000.00	AUD - Australian Dollar	<input checked="" type="checkbox"/>
BUNFV - Buntings - Fortitude Valley	1,000.00	AUD - Australian Dollar	<input type="checkbox"/>

Key Information when creating or maintaining a category default sets includes:

- Category Default Set – The free-form text name allocated for the category default set. Entry is mandatory. Can be up to 30 characters and a mix of alpha, numeric, and special characters.
- Category Default Set Description – The free-form text description of the category default set. Entry is mandatory. Can be up to 100 characters and a mix of alpha, numeric, and special characters.
- Expense Element – Entry is optional and when entered is validated against MSO931 - Expense Elements. District-specific validation is not performed until the Expense Element is used when creating a Purchase Requisition in MSERQL – Requisition. Any district validation errors will be displayed to the user in MSERQL and will prevent the purchase requisition from being created.

- Supplier – Entries are optional and when entered are validated against MSE200 - Suppliers. Multiple suppliers can be allocated to a Category Default Set. Each Supplier can also have:
  - Auto Order Limit is a mandatory numeric value that is required when the supplier has been added to the list. It will be applied to the requisition item total amount when automatically living a purchase requisition to a purchase order within MSERQL - requisition. Leave as zero so all purchase order items for the supplier are required to be approved.

**Note:** The supplier Auto Order Limit is only used when initially creating a purchase requisition using MSERQL - Requisition. Approving the unauthorised Purchase Requisition using MSEAPM - Approvals Manager will not recheck the Supplier's Auto Order Limit. Changing the price or quantity of the Purchase Order in MSO220, will not recheck the auto order limit on the Product Service Category defaults.

- Preferred Supplier – A preferred supplier is required to be nominated when at least one supplier has been added. Only one supplier can be set as a preferred supplier. When no supplier in the list is selected as a preferred supplier, the system will automatically allocate the first supplier as the preferred supplier.
  - District specific validation is not performed until the supplier is used when creating a Purchase Requisition in MSERQL – Requisition. Any validation errors will be displayed to the user and will prevent the purchase requisition from being created
- Purchasing Officer – Entries are optional and when entered are validated against MSE81H - Employees. Purchasing Officer and Purchasing Team are mutually exclusive; when the Purchasing Officer has been entered, the Purchasing Team will be disabled.
  - Purchasing Team – Entries are optional and when entered are validated against MSETMS - Teams. Purchasing Officer and Purchasing Team are mutually exclusive; when the Purchasing Team has been entered, the Purchasing Officer will be disabled.

**Note:** Category Defaults Sets are not validated as district specific when created. Those defaults fields that require additional validation for a district (e.g., expense element, or supplier business information), will be validated for the district when they are used within a business process. Category Default Sets can be assigned globally or for a nominated district(s). Defaults assigned for a district will be used before the Globally assigned defaults.

The suppliers grid display can be customised by checking or unchecking the columns for the data to be displayed.

Show or hide columns

Row Number

Auto Order Limit

Currency

Order of Preference

Preferred Supplier

Supplier Code

Both:Code first

Both:Code first

OK

Cancel

**Note:** A Category Default Set cannot be deleted from MSE1DS - Category Default Set while it is assigned to a Product Service Category.

# Component Differences in Ellipse 9.0.12

## New Components

The following new components have been implemented for this development item:

### MSE1DS – Category Default Set

The following new services have been created to support this new application:

- CATEGORYDEFAULTSET
- CATEGORYDEFAULTSETSUPPLIER

### MSF1E7 – Category Defaults

The new file has been created to record the Category Default Sets.

### MSF1E8 – Category Defaults Suppliers

The new file has been created to record the list of suppliers allocated to the Category Default Set on MSF1E7.

### MSFXCD – Cross-Reference Category Defaults

The new cross reference file has been created to record the association between a Product Service Category, Category Default Set and District. When the association is Globally defined, the district field will be blank.

## Modifications to Existing Components

The following components have been modified for this development item:

### MSE1E1 – Product Service Category

On the Search page, the following fields have been combined into one:

- Category Id
- Parent Category Id
- Category Name Search Method
- Category name
- Category Description Search Method
- Category Description

Enhancements have been made to add the following search fields:

- Product Service Category Id
- Category default Set
- District
- Search Option
- Expense Element

- Supplier
- Purchasing Officer
- Purchasing Team

Enhancements have been made to add the following actions which can be applied to the Product Service Category using the Search Screen:

- Assign a Category Default Set
- Unassign a Category Default Set

The following new services have been created to support these enhancements to this application:

- PRODUCTSERVICESCATEGORY

## Obsolete Components

None.

# How to Configure

## Modules

Module No	Module Name	Required	Notes
3001	General	Yes	
3140	Stores	Yes	
3201	Supplier Information	Yes	
3210	Purchasing	Yes	
3920	Chart of Accounts	Yes	

## System Control File

Screen	Attribute	Required	Notes
Not Applicable			

## District Control File

Not Applicable

## Table Codes

010 Table	Description	Table Type Def	Notes
AMRC	Approval Manager Reason Code	Reason code '20' Supplier Auto Order Limit exceeded	

## Data Conversion

Not Applicable

## Security

### MSE02D – Update Security Application

Application	Access Level		Notes
	Maintainer	Reviewer	
MSE1DS	Full Access	Full Access	
MSE1E1	Full Access	Full Access	

### MSE02C – Update Security Classes – Methods

Class Name	Class Method	Access Level		Notes
		Maintainer	Reviewer	
CATEGORYDEFAULTSET	CategoryDefaultSetPreCommit	9 - Full Access	0 - No Access	
	Copy	9 - Full Access	0 - No Access	
	Create	9 - Full Access	0 - No Access	
	Delete	9 - Full Access	0 - No Access	
	Dropdown	9 - Full Access	0 - No Access	
	Read	9 - Full Access	0 - No Access	
	Search	9 - Full Access	0 - No Access	
	Update	9 - Full Access	0 - No Access	
CATEGORYDEFAULTSETSUPPLIER	Create	9 - Full Access	0 - No Access	
	Delete	9 - Full Access	0 - No Access	
	Read	9 - Full Access	0 - No Access	
	Search	9 - Full Access	0 - No Access	
	SearchSupplierByPSC	9 - Full Access	0 - No Access	
PRODUCTSERVICECATEGORY	Update	9 - Full Access	0 - No Access	
	AssignCategoryDefault	9 - Full Access	0 - No Access	
	SearchForCategory	9 - Full Access	0 - No Access	
	UnassignCategoryDefault	9 - Full Access	0 - No Access	

## MSE02C – Update Security Classes – Attributes

Class Name	Class Attribute	Class Attribute Description	Review Flag	Access Level	
				Maintainer	Reviewer
CATEGORYDEFAULTSET	CATEGDEFSETID	Category Default Set		Read Write	Read Only
	CATEGDEFSETNAME	Category Default Name		Read Write	Read Only
	COPYFROMCATEGDEFSETID	Category Default Set		Read Write	Read Only
	EXPENSEELEMENT	Expense Element		Read Write	Read Only
	PURCHASINGOFFICER	Employee		Read Write	Read Only
	PURCHASINGTEAM	Team Identifier		Read Write	Read Only
	SUPPLIERNO	Supplier		Read Write	Read Only
CATEGORYDEFAULTSET SUPPLIER	BYPASSTHRESHOLDCURR	Currency Type		Read Write	Read Only
	BYPASSTHRESHOLDVALUE	Lower limit of authority		Read Write	Read Only
	CATEGDEFSETID	Category Default Set		Read Write	Read Only
	DSTRCTCODE	District		Read Write	Read Only
	ORDEROFPREFERENCE	Order of Preference		Read Write	Read Only
	PRODSERVCATEG	Product/Service Category Name		Read Write	Read Only
	REQDEFAULTFLAG	Requisition Default Flag		Read Write	Read Only
	SUPPLIERNAME	Supplier Name		Read Write	Read Only
PRODUCTSERVICESCAT EGORY	SUPPLIERNO	Supplier		Read Write	Read Only
	ASSIGNDSTRCTCODE	District		Read Write	Read Only
	CATEGDEFSETID	Category Default Set		Read Write	Read Only
	CATEGID	Category Identification		Read Write	Read Only
	CATEGORYDEFAULTSET	Category Default Set		Read Write	Read Only
	DSTRCTCODE	District		Read Write	Read Only

Class Name	Class Attribute	Class Attribute Description	Review Flag	Access Level	
				Maintainer	Reviewer
	DSTRCTSEARCHOPTION			Read Write	Read Only
	DUMMYCATEGID	Category Identification		Read Write	Read Only
	EXPENSEELEMENT	Expense Element		Read Write	Read Only
	PARTNERNAME	Partner Name for Envoy Buyer		Read Write	Read Only
	PURCHASINGOFFICER	Employee		Read Write	Read Only
	PURCHASINGTEAM	Team Identifier		Read Write	Read Only
	SHOWALLDISTRICT	Boolean Value		Read Write	Read Only
	SUPPLIERNO	Supplier		Read Write	Read Only

## Core Menu Changes

Not Applicable.

## Other Configuration

### Personalisations

When upgrading from prior versions of Ellipse EAM before Ellipse EAM 9.0, personalised screens for MSE1E1 applications will require updating.

# Functional Overview

The following activities can be performed:

- Create a Category Default Set
- Maintain a Category Default Set
- Assign a Category Default Set to a Product Service Category
- Unassign a Category Default Set from a Product Service Category

## Create a Category Default Set

Use this activity to Create a Category Default Set and add Suppliers.

### Activity Steps

1. Access MSE1DS - Category Default Set.

The MSE1DS - Search Category Default Set screen displays.

The screenshot shows the 'MSE1DS - Search Category Default Set' screen. At the top, there are tabs for 'Search', 'New Search', '+ New', and 'Screen Defaults'. Below these are search filters: 'Category Default Set' (a dropdown menu), 'Expense Element' (a text input), 'Purchasing Officer' (a dropdown menu), 'Supplier' (a dropdown menu), and 'Purchasing Team' (a dropdown menu). Below the filters is a table with the following headers: 'Category Default Set', 'Category Default Set Description', 'Expense Element', 'Purchasing Officer', and 'Purchasing Team'. The table is currently empty.

2. Select New

The MSE1DS - Create Category Default Set screen displays.

The screenshot shows the 'MSE1DS - Create Category Default Set' screen. At the top, there are tabs for 'MSE1DS - Search Category Default Set' and 'MSE1DS - Create Category Default Set'. Below these are action buttons: 'Submit', 'Reset', 'Open', 'New Search', and 'Screen Defaults'. The form contains fields for 'Category Default Set' (a dropdown menu), 'Description' (a text input), 'Expense Element' (a dropdown menu), 'Purchasing Officer' (a dropdown menu), 'Supplier' (a dropdown menu), and 'Purchasing Team' (a dropdown menu). Below the form is a table with the following headers: 'Supplier Code', 'Auto Order Limit', 'Currency', and 'Preferred Supplier'. The table is currently empty.

3. Enter the Details for the following fields:

- Category Default Set
- Description
- Expense Element
- Purchasing Officer
- Purchasing Team

4. Select Submit.

MSE1DS - Search Category Default Set | MSE1DS - Update Category Default Set

Submit Refresh New Save As Delete Open New Search

Message Count: 1

Category Default Set: HARDWARE R100

Description: CATEGORY DEFAULTS FOR HARDWARE IN DISTRICT R100

Expense Element: 00001

Purchasing Officer: SSCOTT

Purchasing Team: SCOTT,STEVE

Suppliers

+ Add

Supplier Code	Auto Order Limit	Currency	Preferred Supplier
---------------	------------------	----------	--------------------

To add Suppliers to the Category Default Set:

5. Select Add on the top left side of the Supplier grid

A new line is added to the grid

Category Default Set: HARDWARE R100

Description: CATEGORY DEFAULTS FOR HARDWARE IN DISTRICT R100

Expense Element: 00001

Purchasing Officer: SSCOTT

Purchasing Team: SCOTT,STEVE

Suppliers

+ Add

Supplier Code	Auto Order Limit	Currency	Preferred Supplier

6. Enter the following details in the editable grid and select submit:

- Supplier Code
- Auto Order Limit
- Preferred Supplier

7. Select Submit

The MSE1DS - Update Category Default Set screen displays with the Supplier details added.

MSE1DS - Search Category Default Set | MSE1DS - Update Category Default Set

Submit Refresh New Save As Delete Open New Search

Category Default Set: HARDWARE R100

Description: CATEGORY DEFAULTS FOR HARDWARE IN DISTRICT R100

Expense Element: 00001

Purchasing Officer: SSCOTT

Purchasing Team: SCOTT,STEVE

Suppliers

+ Add

Supplier Code	Auto Order Limit	Currency	Preferred Supplier
BLACK - Blackwoods	1,000.00	AUD - Australian Dollar	✓

# Maintain a Category Default Set

Use this activity to Maintain a Category Default Set.

## Activity Steps

1. Access MSE1DS - Category Default Set.  
The MSE1DS - Search Category Default Set screen displays.
2. Enter the relevant search criteria and click Search.  
A list of Category Default Sets display in the search results grid.
3. Select the required Category Default Set.  
The MSE1DS - Update Category Default Set screen displays.

Supplier Code	Auto Order Limit	Currency	Preferred Supplier
BLACK - Blackwoods	1,000.00	AUD - Australian Dollar	<input checked="" type="checkbox"/>

4. Review and modify the Details for the following fields:
  - Description
  - Expense Element
  - Purchasing Officer
  - Purchasing Team
5. To modify the Supplier List, modify details in the following fields of the grid
  - Supplier Code
  - Auto Order Limit
  - Preferred Supplier
6. *To Delete a supplier*  
Select the grid line cross
7. Select Submit.  
The MSE1DS - Update Category Default Set screen displays with the updates applied.

Supplier Code	Auto Order Limit	Currency	Preferred Supplier
BLACK - Blackwoods	1,000.00	AUD - Australian Dollar	<input checked="" type="checkbox"/>
BUNFV - Bunnings - Fortitude Valley	1,000.00	AUD - Australian Dollar	<input type="checkbox"/>

# Assign a Category Default Set to a Product Service Category

Use this activity to assign a category default set to a product services category using MSE1E1 – Product Service Category.

## Activity Steps

1. Access MSE1E1- Product Services Category.

The MSE1E1- Search Product Services Category screen displays.

Enter the relevant search criteria

2. Select Search.

Product services category entries which match the search criteria entered display in the results grid.

Product Services...	Parent Category Id	Category Name	Category Description	Category Default Set	Distr...
53		HARDWARE AND ABRASIVES	HARDWARE AND ABRASIVES		
5305	53	SCREWS	SCREWS		
5306	53	BOLTS	BOLTSBOLTS 1BOLTS 2BOLTS 3BOLTS 4		
5307	53	STUDS	STUDS		
5310	53	NUTS AND WASHERS	NUTS AND WASHERS		
5315	53	NAILS,KEYS AND PINS	NAILS,KEYS AND PINS		
5320	53	RIVETS	RIVETS		
5325	53	FASTENING DEVICES	FASTENING DEVICES		
5330	53	PACKING AND GASKET	PACKING AND GASKET MATERIALS		
5331	53	O-RING	O-RING		
5335	53	METAL SCREENING	METAL SCREENING		
5340	53	MISCELLANEOUS HARDWARE	MISCELLANEOUS HARDWARE		
5341	53	BRACKETS	BRACKETS		
5342	53	HARDWARE,WEAPON SYSTEM			
5345	53	DISKS AND STONES,ABRASIVE	DISKS AND STONES,ABRASIVES		
5350	53	ABRASIVE MATERIALS	ABRASIVE MATERIALS		
5355	53	KNOBS,POINTERS	KNOBS,POINTERS		
5360	53	COIL,FLAT AND WIRE SPRING	COIL,FLAT AND WIRE SPRINGS		

3. Select the Product Service Category(s) which the Category Default Set will be assigned.
4. Select the action 'Assign Category Default Set'.

**MSE1E1 - Search Product Services Category**

Q Search Q New Search + New Process Model Screen Defaults

Product Services Category Id: 53  
 Category Default Set: HARDWARE AND ABRASIVES - HARDWARE AND ABRASIVES  
 District:   
 Expense Element:   
 Purchasing Officer:   
 Search Option: Global  
 Supplier:   
 Purchasing Team:

**Assign Category Default Set**

Product Services...	Parent Category Id	Category Name	Category Description	Category Default Set	Distr...
53	53	HARDWARE AND ABRASIVES	HARDWARE AND ABRASIVES		
5305	53	SCREWS	SCREWS		
5306	53	BOLTS	BOLTSBOLTS 1BOLTS 2BOLTS 3BOLTS 4		
5307	53	STUDS	STUDS		
5310	53	NUTS AND WASHERS	NUTS AND WASHERS		
5315	53	NAILS,KEYS AND PINS	NAILS,KEYS AND PINS		
5320	53	RIVETS	RIVETS		
5325	53	FASTENING DEVICES	FASTENING DEVICES		
5330	53	PACKING AND GASKET	PACKING AND GASKET MATERIALS		
5331	53	O-RING	O-RING		
5335	53	METAL SCREENING	METAL SCREENING		
5340	53	MISCELLANEOUS HARDWARE	MISCELLANEOUS HARDWARE		
5341	53	BRACKETS	BRACKETS		
5342	53	HARDWARE,WEAPON SYSTEM			
5345	53	DISKS AND STONES,ABRASIVE	DISKS AND STONES,ABRASIVES		
5350	53	ABRASIVE MATERIALS	ABRASIVE MATERIALS		
5355	53	KNOBS,POINTERS	KNOBS,POINTERS		
5360	53	COIL,FLAT AND WIRE SPRING	COIL,FLAT AND WIRE SPRINGS		

The Assign Category Default Set dialog displays

- Enter data in the following field:
  - Category Default Set
  - District

**Assign Category Default Set**

Category Default Set: HARDWARE R100  
 District: R100 R100 AUD/USD FAR DISTRICT  
 CATEGORY DEFAULTS FOR HARDWARE IN DISTRICT R100

OK Cancel

- Select OK

The MSE1E1 - Search Product Services Category screen displays with the results of the assignment.

**MSE1E1 - Search Product Services Category**

Q Search Q New Search + New Process Model Screen Defaults

Product Services Category Id: 53  
 Category Default Set: HARDWARE AND ABRASIVES - HARDWARE AND ABRASIVES  
 District:   
 Expense Element:   
 Purchasing Officer:   
 Search Option: Global  
 Supplier:   
 Purchasing Team:

**Assign Category Default Set**

Product Services...	Parent Category Id	Category Name	Category Description	Category Default Set	Distr...
53	53	HARDWARE AND ABRASIVES	HARDWARE AND ABRASIVES		
5305	53	SCREWS	SCREWS		
5306	53	BOLTS	BOLTSBOLTS 1BOLTS 2BOLTS 3BOLTS 4		
5307	53	STUDS	STUDS		
5310	53	NUTS AND WASHERS	NUTS AND WASHERS		
5315	53	NAILS,KEYS AND PINS	NAILS,KEYS AND PINS		
5320	53	RIVETS	RIVETS		

# Unassign a Category Default Set to a Product Service Category

Use this activity to unassign a category default set from a product services category using MSE1E1 - Product Services Category screen.

## Activity Steps

1. Access MSE1E1- Product Services Category.

The MSE1E1 - Search Product Services Category screen displays.

Enter the relevant search criteria

2. Select Search.

Product Services Category entries which match the search criteria entered display in the results grid.

3. Select the Product Service Category(s) with the Category Default Set to be unassigned.

The Please Confirm dialog displays.



4. Select OK.

The MSE1E1 - Search Product Services Category screen displays with a message the records have been unassigned.



## FAQs

- Question: Do I have to enter defaults for all fields on a category default set?
- Response: No, all fields are optional. You may enter the defaults as appropriate for your usage. An Auto Order Limit is required if a supplier has been added.
- Question: Do I have to create a category default set for each district?
- Response: Some defaults, such as Expense Element and Supplier, are not validated against a district when added to the Category Default Set. For defaults that are defined specifically for use within a single district, it is recommended that you create a category default set and assign it to the product service category for that district.
- Question: Do I have to assign a category default set to a Product Service Category globally before I can assign it to a nominated district?
- Response: No, assigning category default sets globally or by district are independent of each other.
- Question: Do I have to enter and maintain the Product Service Category hierarchy for districts?
- Response: No, the Product Service Category and its hierarchy is defined once. The PSC name, description and parent category id shown for a 'district' entry is from the global entry. Changing the name, description or parent category id on the detail page will change the name, district or parent category id for the global and all the district entries.
- Question: How do I view the PSC hierarchy without the district assigned records?
- Response: Use the Search Option 'Global'.
- Question: How do I view which Product Service Categories have defaults defined for one or more districts?
- Response: Use the Search Option 'District'. Leave the search District blank to return all districts.
- Question: Can I assign more than one PSC to a category default set at once?
- Response: Yes, use the search criteria to find the Product Service Category you wish to assign a category default set. Select the check box(es) on the left side of the line in the result grid and select the action 'Assign Category Default Set'.
- Question: Can I assign a Category Default Set to a new Product Service Category when using the 'Save As'.
- Response: No. Category Default Sets can only be assigned from the Search screen.

## Definitions, Acronyms and Abbreviations

Definition	Description
PSC	Product Service Category

## References

Document	Location
Requisition Enhancements Functional Overview	