



Query Repository View Enhancements (Project IUUN0020)

Purchasing in Oracle

July 30, 2003 - 230B McVey - 8:00 – 9:30

ATTENDEES:

Dale Austin, Jayna Cheesman, Debra Claunch, Jody Reed, Kevin Stevens

PRESIDING:

Jayna Cheesman

PROJECT COORDINATOR:

Jayna Cheesman, Kathy Hamperian

AGENDA ITEM	DISCUSSION
<ul style="list-style-type: none"> <li>• <b>Element Naming Standards</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Jayna reviewed the Data Element Naming Standards document. She explained there are three components to the element name. The Prime is the subject area. The Class describes the content of the data, whether it is an amount, value, code, etc.</li> <li>▪ Jayna said she verified the description of 'number' and it is an identifier and does not have to be numeric. If the element is numeric then 'amount' or 'value' is used as the classification.</li> <li>▪ Jayna said Qualifiers which further describe the Prime and Class words, will generate a lot of discussion on the order the words should be in, and what makes the most sense.</li> <li>▪ Jayna said Deb had created the UKFRS_RPT Purchasing Views spreadsheet from the current views available in Oracle. Deb created the logical words and then will create the abbreviations after Purchasing approves the logical names.</li> <li>▪ Jayna said one of the recent decisions made by the QRVE Workgroups was to not abbreviate words less than five (5) characters. One of the naming standards for abbreviating is to remove vowels. Because of a 32-character limitation in Oracle on the names, this standard may not be able to be followed in all cases. Jayna said the Prime Word and Class Word are the most important for data management purposes, and will be required for each name.</li> <li>▪ Jayna said the Data Custodians are more familiar with the data, and IT would be working with them to standardize the names. The users may not know the data. After the first pass of naming the elements is completed, the names will be presented to the users for feedback. Dale said it was important to be aware that if the names are later changed, any reports already created by the users would have to be changed as well.</li> <li>▪ Jayna said the standards would be implemented across all systems and a master list of Prime Words, Class Words and Qualifiers would be created and used across all systems. For instance, ACCT will always be the abbreviation for Account.</li> <li>▪ Dale said the ABR Code is actually a digital value but is defined as a Code in FRS. Jayna said other commonly interchanged Class Words are Flag and Code. The goal will be to make it easy for the users. She said Codes usually have an English translation associated with them. For instance, Department Number has an English translation whereas Room Number, and alpha-numeric element has no English translation. Department Number is actually a Code, but since it is commonly identified as Number, will remain as Department Number. <ul style="list-style-type: none"> <li>▪ <b>DATA QUALITY ISSUE: Need to identify all elements that need translation tables. In particular, identify elements that are classified as Number, but have <u>no</u> translations.</b></li> </ul> </li> <li>▪ Jayna said standards will be applied when naming Views as well. For instance, V_EMP_DEMO will designate View</li> </ul>

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	<p>Employee Demographics.</p> <ul style="list-style-type: none"> <li>▪ Dale said there are three or four categories of elements that are not in use, in the Commodity and Bid Modules. He was unsure if the 1099 data is from Accounts Payable or Purchasing. <ul style="list-style-type: none"> <li>▪ <b>ACTION: Deb will check the spreadsheet against the In-Use elements identified earlier in MIST and update the spreadsheet.</b></li> </ul> </li> <li>▪ Jayna said an element may appear on one or more views. If the element is the same in each view then the element name will be the same. If the element is cleansed or changed in any way, then the name will reflect this difference. If the element is in a snapshot view for a particular year or term then the View will reflect this time dimension, not the element name.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>UKFRS-Purchasing Views Spreadsheet</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Deb explained the spreadsheet was sorted by CURRENT TABLE NAME and then by IDMS SYNNAME. She said it might be easy to identify certain views not in use. <ul style="list-style-type: none"> <li>▪ <b>ACTION: Deb will sort the spreadsheet by IDMS SYNNAME and send it to Dale, Jody and Kevin. (Completed 8/1/03.)</b></li> </ul> </li> <li>▪ Deb explained what some of the formatting on the spreadsheet meant, elements with two IDMS COBOL names, questions about whether highlighted words are needed in the element name, questions on whether elements are Codes, Flags, Switches, etc.</li> <li>▪ Dale explained what the following synonym designations mean: <ul style="list-style-type: none"> <li>▪ VN – Vendor demographics</li> <li>▪ VO – Voucher</li> <li>▪ VF – Tax ID</li> <li>▪ VE – 1099 demographics</li> <li>▪ VB – Batch (not used or reported on)</li> <li>▪ VD – Duplicate invoice</li> <li>▪ VC – Check Recon (Reconciliation)</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• <b>Prime Words</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ General discussion about Prime Words. <ul style="list-style-type: none"> <li>▪ A Purchase Order can have many vouchers (for multiple payments).</li> <li>▪ Each payment on a Purchase Order is on a unique voucher.</li> <li>▪ There is only one Purchase Order on a Voucher.</li> <li>▪ There is only one Check per Voucher.</li> <li>▪ A Check can have multiple Vouchers, multiple Purchase Orders, but only one Vendor.</li> <li>▪ Checks hang off Vouchers.</li> <li>▪ 1099 hangs off the Voucher.</li> <li>▪ Invoices hang off the Purchase Document and the Voucher.</li> </ul> </li> <li>▪ Discussion about whether or not Voucher should be a Prime Word. Dale said some people may want to read the voucher file. He said you could have a Voucher and Vendor without a Purchase Order, for instance for travel.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Commodity</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Dale said the Commodity elements are not utilized. Jody asked if this would change with EBars. Dale said there is no batch updating to Purchasing and many changes would have to be made.</li> <li>▪ General discussion on how the system defines commodity. It was unclear if the commodity is a higher level classification code for items or equivalent to the vendor catalog or item identifier. Discussion was deferred to a later date.</li> </ul>
<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>▪ Discussion on Century_Date.</li> </ul>

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	<ul style="list-style-type: none"> <li>▪ If the element length is 7 or 8 characters, assume this is a Date and do not include Century in the name.</li> <li>▪ If the element length is 2 characters, assume this is the century and do include Century in the name.</li> <li>▪ View IAPRCHA, PHA_FED_FY_CC_ACCOUNT and PHA_FY_CC_ACCT are 14-characters in length. The first two digits are the fiscal year and are not used. The next two digits are the two-digit campus code and are not used. The only campus code used is '00'. The last 10 digits are equivalent to the 10-digit account number and are the only digits being used.</li> <li>▪ View IAPRCHA, UXPEL_PHA_USER_CODE can be 10 digits in length and ties to the account record.</li> <li>▪ AP will be the abbreviation used for Accounts Payable.</li> <li>▪ Switch will be classified as Flag.</li> <li>▪ BBA is an acceptable abbreviation for Budget Balance Available.</li> <li>▪ Currency codes are not used. <ul style="list-style-type: none"> <li>▪ <b>DATA QUALITY ISSUE: PI022 the PIH-DISCOUNT-FLAG (Purchase Invoice Header) and PI122 the PIL-DISCOUNT-FLAG (Purchase Invoice Line) have different values.</b></li> </ul> </li> <li>▪ OOAK means One Of A Kind. Dale explained there is one record in the system that stores this value, for instance a system date.</li> <li>▪ Discussion about elements that are In-Use, but may not need to be available for reporting in the views. <ul style="list-style-type: none"> <li>▪ <b>ACTION: Deb will add a column to the spreadsheet to track whether or not elements should be included in a View. (Completed 8/1/03.)</b></li> </ul> </li> <li>▪ PURDOC will be the abbreviation for Purchase Document. <ul style="list-style-type: none"> <li>▪ <b>ACTION: Deb will make changes to the spreadsheet and send it to everyone for further review. (Completed 8/1/03.)</b></li> <li>▪ <b>ACTION: Dale and Jody will return their changes to Deb by August 6, 2003 so Deb can begin on the abbreviations.</b></li> </ul> </li> </ul>