***Software Delivery – Product Introduction***

***(SD- PI)***

*Release 2.0*

SD-PI DSW User's Guide

XXX

Any hardcopy versions are for Reference Only

Prepared By: XXX

**Notes ID:** XXX

**E-mail:** XXX

**Phone:** XXX

# Introduction to SD-PI

## SD-PI Environments

* SD-PI Beta: <http://ibmurl.hursley.ibm.com/NUP3>
* SD-PI Gamma: <https://w3beta-sso.toronto.ca.ibm.com:444/isc/sdpi/>
* SD-PI Production: <https://w3-01.sso.ibm.com/isc/sdpi/AlertsPage.wss>
* SD-PI Help pages: <http://ibmurl.hursley.ibm.com/NWSD>

## Other Environments

* RTC: <http://ibmurl.hursley.ibm.com/NXIW>
* SW Requests DB (DAT DB): <notes://D01DBL04/87256A4100483BC7>

## Access Request

As a BNPM / NPM, you must have access to **SD-PI Production / RTC / SW Requests DB (DAT DB)** for daily work on SD-PI.

* SD-PI / RTC Access Request Guides: <http://ibmurl.hursley.ibm.com/NWSE>
* Request access for SD-PI Gamma: <http://ibmurl.hursley.ibm.com/NWU0>
* Request / Reset CDT password (for SD-PI Beta): <http://ibmurl.hursley.ibm.com/NUP4>
* For SW Requests DB (DAT DB) access, any new BNPM / NPM will need to send an email to Business Template Implementation/Slovakia/IBM, explaining your job role - BNPM / NPM.

## SD-PI DSW SaaS Project Communities

* SD-PI SaaS implementation community: <http://ibmurl.hursley.ibm.com/NWV5>
* SD-PI DSW SaaS user community: <http://ibmurl.hursley.ibm.com/NWV6>

For more useful links, check [***here***](#_Appendix_1_-).

## SD-PI Basic Concepts (MANDATORY)

* How SD-PI is connected with upstream and downstream systems, check [***here***](#_Appendix_2_-_1).
* SD-PI to DSW nomenclature mapping, check [***here***](#_Appendix_3_-_1).
* What is **Schedule**? Check [***here***](#_Appendix_4_-).
* What is **DAT** and how to choose the correct part type? Check [***here***](#_Appendix_3_-).
* What are the **Control Values** (SMG3, SMG5, ERO etc.) and what are the schemes to control them? Check [***here***](#_Appendix_6_–).
* How to log defects and feedbacks for SD-PI in **RTC**? Check [***here***](#_Appendix_10_–).

## SD-PI Advanced Functions

* How to change user preferences? Check [***here***](#_Appendix_7_–_1).
* How to copy an offering? Check [***here***](#_Appendix_7_–).
* How **Projects** can help you to handle multiple offerings at the same time? Check [***here***](#_Appendix_7_–)

# Create New Offerings

## Create DSW SaaS offering with basic updates to the process tab.

1. In SDPI, go to offerings on left navigation bar.
2. Select new button on bottom of screen.
3. Select enablement process: DSW.
4. The Business template field display the correct collection of all the DSW business templates, select the appropriate one.
5. Once BT is selected, License agreement type is populated. Select the appropriate one or leave as it if there is only one choice with static text.
6. Fill in the Short name for WWPC with 35 characters limit.
7. Fill in the Long name for WWPC with 254 characters limit.
8. Fill Version, Release and Modification of the offering.
9. Fill in the schedule name, default to Introduction.
10. Fill in the Announcement date if users have priced parts or leave it blank if users do not have priced parts.
11. If BT is BT15 or BT59, user see only sGA date which means SaaS GA date. If BT is anything except BT15 or BT59, user see eGA date and pGA date. Fill in these GA dates.
12. Hit Submit Button. User will see the WWPC is automatically assigned at the top of the offering page.
13. Go to the offering's Process->Overview page, fill in all the fields. (Note: Electronic Delivery will default to No)
14. Go to the offering's Process->Classification page, fill in all the fields. (Key prerequisites field will not be editable until after the Offering ID has been created)
15. Go to the offering's Process->Team page, hit New button to add BNPM and NPMs, or any other roles if needed.

## Create Licensed Functions (CCs).

1. Go to Ordering ->Licensing page.
2. Click New button and see Create License Function page.
3. Name field (75 char string) defaults to: "IBM" + SW Product Brand code + Offering short name.
4. Select Acquisition code.
5. Select SMG 4.
6. Select DAT, the field is populated with appropriate DSW DATs under the BT users select. If it is unapproved DAT, fill in WWERB exception number.
7. At the Is Bundle field, it defaults to No, if users select Yes, they will see "Note: Offering must be approved for revenue sharing", following which are the below choices:

* Standard Bundle(default),
* Non-standard Bundle,
* CEO Bundle,
* Appliance Bundle

Select appropriate choice

1. At the Audience mask field, select appropriate choices.
   * Internal (1);
   * Reseller (2);
   * Existing Customer (4);
   * Public (8);
   * Partnerworld for Software (16);
   * IEMS Partner (32)

Default value is 15, which is:  Internal (1); Reseller (2); Existing Customer (4); Public (8)

1. Hit submit button, the license function is created. User see as below in the General page:
   * CCID (initially blank)
   * Name
   * Acquisition code
   * SMG 4
   * DAT
   * Is bundle
   * Audience mask
   * Availability
   * Comment field - click collapse on the right hand, user see Add Comment button at the end and click it, user type any comments in the box and click OK, then user will see a log of comment in the Comment field.

## Create License Structure (SubIDs) and view orderable license & revenue components.

1. In the offering, its schedule is set as current schedule.
2. Go to Ordering ->Licensing tab, users see the license function (LF), click the hyper link of the name and users go into LF.
3. In LF's general page, user ensure all the necessary fields have been filled.
4. Go to License structure page, click create button, the license structure for LF is created. Users see that mandatory LOGs(license option groups) and LOPs(license options) are pre-selected. Optional LOGs are presented with active selection boxes.
5. Select the mandatory and/or optional LOGs the user would like. Select charge metrics for them, user could use Find filter to select the charge metrics. Hit Save button.
6. In the license structure view page, user see all the selected LOGs. For each LOG, there are following items of information:
   * License option group(VM category)
   * Subscription ID (initially blank)
   * Charge metric
   * License options
7. Navigate to Orderable Licenses page. Top level orderable Licenses are created under each license option group, which is headed by first license option group (VM category) and then charge metric. For all the top level orderable Licenses, the following columns are displayed: Status (Pre announce), Schedule(with links), Description (contains the 75 char description, and is a link to the OL detail page), Part number, PPT ID, Revenue stream code, AAG, Part option code, BOM(text 'Sales BOM' and link to Sales BOM detail page--it is not accessible currently) and Upgrade (shows a check mark for an upgrade OL, otherwise it is blank).
8. User click the hyper link of the Description of any one of the license PNs, user will see a list of attributes of that license PN:
   * Part name
   * Part short name
   * Part long name
   * Part number (initially blank)
   * PPT ID
   * Rev. stream
   * AAG
   * Part option code
   * Duration indicator
   * SAP item category
   * SAP material type
   * SAP material group
   * SMG 4
   * Contract program code
   * Distribution code
   * Seat quantity
   * Sales BOM owns revenue components(link to Sales BOM on the same line)
   * Is upgrade
   * Order qty rounding profile
   * Subscription tier model values
   * Provisioning hold type
   * Published price duration
   * SaaS renewal type
   * Upfront billing
   * Monthly billing
   * Quarterly billing
   * Annual billing
   * Billing event flag
9. Click Edit button at the end of the page, user will see fields that could not be overridden, fields that could be overridden and they are system generated and fields that could be overridden and they are defaults from PPT.  User needs to select the Subscription tier model value and make any changes as they like.
10. Users click the Save button. Users see all the overridden fields are saved.
11. User click on the hyper link of "Sales BOM" either in Orderable license page or in the Orderable license detail page of a license part, user will see all the revenue components that report to that license part.
12. User click the hyper link of the Description of any one of the revenue components, user will see a list of attributes of that revenue component, which is similar to those attributes of a license PN. Similarly, user can make changes to the fields that could be overridden in the edit mode.

## Assign offering ID and license function IDs and orderable license IDs (SubIDs and license/revenue PNs).

1. Logon to SDPI, and go to offerings on left navigation bar.
2. Check my offerings and DSW for Value Chain.
3. Go into WIP offering O1.
4. Go to Schedules page and go into the schedule by clicking the schedule ID.
5. Hit Request IDs button.
6. Add name of Offering ID and hit submit button.
7. Go back to the offering page user see the offering ID is assigned.
8. Go to the Schedule page again, and open the schedule by clicking its name again.
9. Scroll down to the bottom and click "request IDs" button.
10. For request type, check "other ID request".
11. Check the two boxes "Licensed function IDs" and "Orderable license IDs" under the Licensing IDs section.
12. Click "submit" button and system will alert you that IDs request have been submitted.
13. Go to this offering's Ordering->Licensing Tab, see CC IDs are assigned.
14. Open the CCs by clicking their names, user see Sub IDs are assigned in the License structure tab, and license part numbers are assigned in the Orderable licenses tab,  and user click Sales BOM hyper link for each license part and see revenue part numbers are assigned.

## Release/Commit a schedule to Announcement & Release/Commit a schedule to Manufacturing.

1. Go into offering and then go to Schedules page.
2. Go into the schedule by clicking the schedule ID, system goes to Schedule page.
3. Scroll down to Check for errors>Announcement, hit Run report and the system will run CFE report itself and display the number of errors. If there's 0 error, the Release to announcement button will show up at the end of the page, if there's any error found, go into it, check and correct the errors, then hit Rerun report.
4. Hit Release to announcement button at the end and confirm Ann status now displays Success at the top of the page.
5. Hit Release to Manufacturing button at the end and confirm Mfg status now displays Success at the top of the page.
6. Hit Commit to ann button at the end. Refresh the page as Ann status updates. Confirm Ann status changes to "Committed" finally.
7. Hit Commit to mfg button at the end. Refresh the page as Mfg status updates. Confirm Mfg status changes to "Committed" finally.
8. Some time later, check the offering page later, its Status changes to Announced and GA finally.

# Modify Attributes

## Modify a new offering

For a new offering, the **Standard Schedule** is automatically created when the offering is created. So you just need to set the schedule for the offering, then you will get an Edit button on bottom of the page. Check [Set schedule](#_Set_schedule_(Associate).

## Modify an offering after Commit for Announce

For changes to any existing offerings after Commit for Announce or any Announced offerings, a new **Fix Schedule** must be created and set for the offering before you can get an Edit button on bottom of the page.

Check [Create Schedule](#_Create_Schedule) and [Set schedule](#_Set_schedule_(Associate).

## Modify Control values for an announced offering

For announced offerings, only Global Editors have “Edit Active” capability to change the [Control Values](#_Appendix_3_–). ECOs will be replaced by [RTC](#_Appendix_10_–) "**Feedback**" requests, which will go to a Global Editor for them to make the required changes.

# Withdraw Offerings

A **Standard Schedule** must be created ([Create Schedule](#_Create_Schedule)) before handling any withdrawals, where the Announcement date / Withdraw license, reinstate, FTL date / Withdraw renewal date has been filled out.

Whenever an item is marked for withdrawal it will be listed with a with (wp) for WFM pending and when the schedule has been committed for announcement the item will change to be listed with (w) for Withdrawn.

## Withdrawal of Offering

1. Set your current schedule to the standard schedule you have created for the withdrawal.
2. Go to the Offerings list
3. Check mark the offering you want to withdraw
4. Hit Withdraw selected
5. Now select to withdraw all by selection “Select all” and hit Submit

## Withdrawal of Licensed Function

1. Go to Ordering>Licensing
2. Check mark the Licensed function you want to withdraw
3. Hit Withdraw selected
4. The Licensed function is now marked to be withdrawn
5. On the Ordering>Licensing>Licensed function (to be Withdrawn)>General page, you can see that it is marked for withdrawal
6. Go to the schedule, run CFE, resolve any errors and release the schedule

## Withdrawal of portions of Licensed Functions

1. Set your current schedule to the standard schedule you have created for the withdrawal
2. Go to Ordering>Licensing>Licensed function>License structure and press the Withdraw button
3. Check mark the License option parts you want to make a partial withdrawal
4. Hit save, the selected options are now marked for withdrawal
5. The orderable licence view will show the part numbers being withdrawn
6. Go to the schedule, run CFE, resolve any errors and release the schedule

# Reactivate Offerings

A **Reinstate Schedule** must be created ([Create Schedule](#_Create_Schedule)) before handling any reactivations. Note there are no dates in a Reinstate Schedule.

## Reactivation of Offering

1. Go to the Offerings list
2. Check mark the offering you want to reactivate
3. Hit Reinstate selected
4. Now select to reinstate all by selection “Select all” and hit Submit

## Reactivation of Licensed Function

1. Go to Ordering>Licensing
2. Check mark the Licensed function you want to reactivate
3. Hit Reinstate selected
4. The Licensed function is now marked to be reinstated
5. On the Ordering>Licensing>Licensed function (to be reactivated)>General page, you can see that it is marked for reactivation

## Reactivation of portions of Licensed Functions

1. Go to Ordering> Licensing >Licensed function>License structure
2. Check mark the License option group for which you want to make a partial reactivation
3. Hit Reinstate
4. Check mark the parts you want to reactivate
5. Hit Save
6. The parts are now marked for reactivation

# Global Editor Specific Tasks

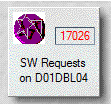
# Appendix 1 - Links

## SD-PI Environments

* SD-PI Beta: <http://ibmurl.hursley.ibm.com/NUP3>
* SD-PI Gamma: <https://w3beta-sso.toronto.ca.ibm.com:444/isc/sdpi/>
* SD-PI Production: <https://w3-01.sso.ibm.com/isc/sdpi/AlertsPage.wss>
* SD-PI Help pages: <http://ibmurl.hursley.ibm.com/NWSD>

## Other Environments

* RTC: <http://ibmurl.hursley.ibm.com/NXIW>
* SW Requests DB (DAT DB): <notes://D01DBL04/87256A4100483BC7>



## SD-PI Access Request

* SD-PI / RTC Access Request Guides: <http://ibmurl.hursley.ibm.com/NWSE>
* Request access for SD-PI Gamma: <http://ibmurl.hursley.ibm.com/NWU0>
* Request / Reset CDT password (for SD-PI Beta): <http://ibmurl.hursley.ibm.com/NUP4>

## SD-PI DSW SaaS Project Communities

* SD-PI SaaS implementation community: <http://ibmurl.hursley.ibm.com/NWV5>
* SD-PI DSW SaaS user community: <http://ibmurl.hursley.ibm.com/NWV6>

## Source and References

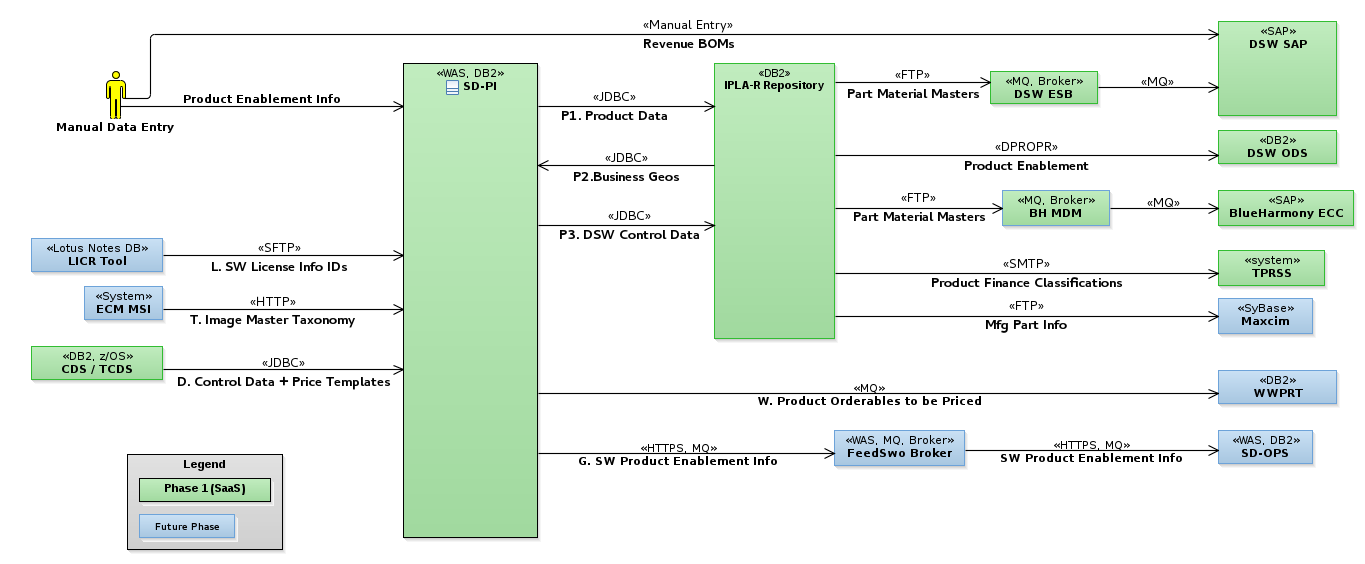
* SD-PI r2.0 System Context for DSW: <http://ibmurl.hursley.ibm.com/NWSF>
* DSW BTs and DATs: <http://ibmurl.hursley.ibm.com/NXIX>
* RTC Feedback: <http://ibmurl.hursley.ibm.com/NXIZ>

[Back to top](#_SD-PI_Basic_Concepts)

# Appendix 2 - SD-PI r2.0 System Context for DSW

The following system context diagrams have been created for the SD-PI project:

* The SD-PI r2.0 System Context (below) identifies the applications and systems which SD-PI will connect to for software product ordered and delivered through the Distributed software channel (DSW). The SD-PI r2.0 application will be deployed in phases. Systems/applications such as SD-PI, IPLA-R, and DSW SAP appear as green boxes in the diagram to indicate these systems will send and/or receive data from SD-PI as part of SD-PI phase 1 (support for SaaS products). Systems highlighted in blue boxes (examples are the LICR Tool and WWPRT) will interact with SD-PI as part of a future SD-PI r2 phase.
* The [IPLA-R System Context](https://w3-connections.ibm.com/wikis/home?lang=en-us#!/wiki/SD-PI%20r1.3%20Architecture%20Documentation/page/IPLA-R%20System%20Context) diagram shows the applications and systems involved with the DSW product introduction process at the start of the SD-PI r2.0 project.
* The [SD-PI r1.x System Context](https://w3-connections.ibm.com/wikis/home?lang=en-us#!/wiki/SD-PI%20r1.3%20Architecture%20Documentation/page/SD-PI%20r1.4%20-%20System%20Context%20for%20ESW%2C%20CSW) identifies the applications and systems which SD-PI connects to for Enterprise (ESW / zSeries) and Configured (CSW / iSeries, pSeries) software product introduction. SD-PI r1.0 was deployed in April, 2012.



Source: <http://ibmurl.hursley.ibm.com/NWSF>

[Back to top](#_SD-PI_Basic_Concepts)

# Appendix 3 - SD-PI to DSW Nomenclature Mapping

|  |  |
| --- | --- |
| **SD-PI nomenclature** | **DSW nomenclature** |
| **Schedule** | **NPR Project - Announcement / Update / Refresh / Withdrawal** |
| **Offering** | **PID, Worldwide Product Code (WWPC)** |
| **Active** | **Announced** |
| **Licensed Function (LF)** | **Chargeable Component - CCID** |
| **Orderable License (OL)** | **Finished Goods part** |
| **Supply Function (SF)** | **Media related - N/A for DSW SaaS** |
| **Orderable Supply (OS)** | **Media related - N/A for DSW SaaS** |
| **RTC - Feedbacks** | **ECO / CWIT** |

[Back to top](#_SD-PI_Basic_Concepts)

# Appendix 4 - Schedule

**Schedules are the driving force of SD-PI. The following table is intended to show how / when data is fed from SD-PI to IPLA-R, within the various phases of an SD-PI schedule.**

|  |  |
| --- | --- |
| **Schedule status** | **Comments** |
| Before requesting ID's | Data is held in SD-PI only, no feeds elsewhere |
| After requesting ID's | Data is held in SD-PI only, no feeds elsewhere |
| Released to Announce | Product data feeds to downstream systems   * Data is "soft locked" and can still be changed within the existing schedule, but will require a re-release to announce to re-feed the data downstream * If you make a change to the schedule, it will be reset to "requires release" status   To get data fed downstream, but avoid an automatic commit to announce - release the schedule, then immediately update it so it goes back to "requires release" status - there is a risk within the last 7 days you may still get automatically committed to announce |
| Released to Manufacturing | Manufacturing related data (process overview / classifications sub-tables) fed to downstream systems |
| Committed to Announce | Takes place automatically 7 calendar days before the announce date defined in the schedule   * Depends on schedule already being released to announce * Assuming a clean load status - all data sent to IPLA-R (or other downstream systems) has been confirmed as successfully received * **Data is then "hard locked" and cannot be changed without a new schedule** * Commit to announce job runs hourly, so any offering Released to Announce within the 7 day window will get Committed within 1 hour   Announce date can be changed, as long as it's done before the existing announce date  The sGA date can be changed, even after the announce date, as long as it's before the existing sGA date  If the announce is cancelled within the last 7 days, first move the announce date out, then withdraw the offering in a separate schedule with the same announce date |
| Committed to Manufacturing | Takes place automatically 1 calendar day before the GA date defined in the schedule |
| Post announce | Need to create a subsequent schedule to make changes |

**There are several kinds of schedules all used for different purposes.**

|  |  |
| --- | --- |
| **Schedule Type** | **Comments** |
| Fix | Use for **immediate** changes to existing (**announced and available**) objects. There are no dates in a Fix Schedule, it's expected that once the schedule is set up, and the data changes made in SDPI, that the schedules will be released right away. |
| Reinstate | To reinstate previously withdrawn offerings or licensed functions. |
| Standard | To create new offerings or new license options / functions, to withdraw existing parts and make changes to **unannounced** items (announcement related data).  Set up a new activity, with an Announcement date, plus one or more of the offered GA / Withdrawal effective dates. |
| Withdraw from service | N/A for SaaS. |
| Hold | N/A for SaaS - Place OSPs (Product media) on hold. |
| Hold Remove | N/A for SaaS - Take OSPs (Product media) off hold. |

[Back to top](#_SD-PI_Basic_Concepts)

## Create Schedule

A schedule must be create in order to perform any updates in SD-PI.

* For a new offering, the schedule is automatically created when the offering is created.
* For changes to any existing offerings a schedule must be created before any work can be started for an offering such as new objects, changes to existing objects, new releases, changes to billing, supply etc.

Steps:

1. Go into the offering you want to do work on.
2. Check My Current Offering and My Current schedule on top right. My Current Offering shows the offering you are in and there should be no offering listed under My Current schedule, which indicate you are in browse mode.
3. Select New from the drop down menu under Set current schedule.
4. Hit the right arrow next to the drop down menu.
5. Select a schedule type (Mandatory). Once selected, additional fields populate based upon schedule type choices:

* Standard (default)
* Fix
* Reinstate
* Withdrawal from Service
* Hold
* Hold remove

1. Hit Submit button.
2. Make selections based upon the type of changes needed.

* Schedule name (Mandatory)
* Announcement date
* General availability date
* Withdraw from marketing date
* Withdraw from production date

Note: there are no dates in a Fix / Reinstate Schedule.

1. Hit Submit button.
2. In the schedule module under My current schedule, you can see the offering for which you want to make updates and the schedule that is associated for the updates.

[Back to top](#_SD-PI_Basic_Concepts)

[Back to Modify Attributes](#_Modify_Attributes)

[Back to Withdraw Offerings](#_Withdraw_Offerings)

[Back to Reactivate Offerings](#_Reactivate_Offerings)

## Set schedule (Associate schedule with offering)

Whenever work is needed for an offering a schedule must be set for the offering, if the schedule is not set, updates are not possible as the tool assumes you are only browsing. Any new objects or changed objects will automatically be associated to the schedule.

There are 2 ways a schedule can be set:

1. **Schedule Module**
2. Go into the offering you want to do work on.
3. In the schedule module under My current offering under the Set current schedule.
4. Hit the drop down menu.
5. Select the Schedule you wish to work with.
6. Hit the right arrow next to the drop down menu.
7. Schedule is now set (see the schedule module).
8. **Schedules tab within the offering**
9. Check mark the schedule you want to work on.
10. Hit Set as current schedule.
11. Schedule is now set (see the schedule module).

[Back to top](#_SD-PI_Basic_Concepts)

[Back to Modify Attributes](#_Modify_Attributes)

## Cancel Schedule

Cancelling an Introduction schedule (the first schedule for a brand new offering) is not allowed for a Global Approver, only Global Editors can do so.

Canceling a schedule is only possible in the following situations:

* If the schedule contains only Announcement data: after it has been released to announcement and prior to commit of Announcement.
* If the schedule contains Announcement and Manufacturing data: after it has been released to announcement or both announcement and manufacturing, and prior to commit of Announcement.
* If the schedule contains only Manufacturing data: after it has been released to manufacturing, and prior to commit of manufacturing.

Steps:

1. Go to Schedules.
2. Check mark schedule to cancel.
3. Hit Delete selected.

[Back to top](#_SD-PI_Basic_Concepts)

## Delete Schedule

To delete a schedule the following must be fulfilled

* Only one schedule at a time can be deleted.
* Schedule status needs to be open.
* Announcement and manufacturing release status should be requires release (or not applicable).
* Schedule cannot ever have been released before.

Additional notes when deleting schedules

* If the schedule is for a new offering then the entire offering will be deleted.
* If a schedule is a predecessor schedule for another schedule then it cannot be deleted.

Steps:

1. Go to Schedules.
2. Check mark schedule to delete.
3. Hit Delete selected.

[Back to top](#_SD-PI_Basic_Concepts)

## Audit Schedule

Steps:

1. Go to Schedules.
2. Search on:
   * Offering ID
   * Offering short name
   * Schedule ID
   * Schedule name
   * Type
   * Release status
   * WWPC
3. Go into the schedule by clicking the Schedule ID or Schedule name.
4. Scroll down to the Schedule summary section, click View report.

[Back to top](#_SD-PI_Basic_Concepts)

# Appendix 5 – DAT School

|  |  |
| --- | --- |
| **Offering Status** | **Implication of changing DAT** |
| Pre announce - before requesting ID's | No part numbers set up |
| Pre announce - after requesting ID's | Part numbers lost and SubIDs lost |
| Requires release | Part numbers lost and SubIDs lost |
| Released to Announce | Part numbers lost and SubIDs lost |
| Committed to Announce- using new schedule to make changes | Part numbers retained - subject to DAT structure allowing this |
| Announced - using new schedule to make changes | Part numbers retained - subject to DAT structure allowing this |

Introduction to DSW BTs and DATs: <http://ibmurl.hursley.ibm.com/NXIX>

[Back to top](#_SD-PI_Basic_Concepts)

[Back to Modify Attributes](#_Modify_Attributes)

# Appendix 6 – Control Values

|  |  |
| --- | --- |
| **Control values** | **Comments** |
| **Offering level:**  **SMG3**  **SMG5** | For announced offerings, only Global Editors (code management team) have “Edit Active” capability to change these fields. |
| **PPT level:**  **Part option code**  **Rev. stream group**  **Rev. stream**  **Upgrade type**  **Evolution allowed**  **AAG**  **Duration indicator**  **Commission group**  **WW price book product**  **code**  **SAP item category**  **SAP material type**  **SAP material group**  **Contract program group**  **Contract program code**  **SAP material group 1**  **Distribution code**  **Seat quantity**  **Sales BOM owns revenue**  **components**  **Revenue component PPTs**  **Sales org code**  **Tax code** | 1. For a new offering, these values are controlled by PPT and when creating a new offering, the offering will have default values from the PPT. However, values below can be set by the Global Editor (code management team) as can or can not be overwritten by Global Approver (BNPM and NPM).  * **AAG** * **Duration indicator** * **Commission group** * **SAP item category** * **SAP material group** * **Contract program code** * **Seat quantity** * **Sales BOM owns revenue components** * **Tax code**  1. For announced offerings, only Global Editors (code management team) have “Edit Active” capability to change these fields. |
| **Part level:**  **Subscription tier model value** | For announced offerings, only Global Editors (code management team) have “Edit Active” capability to change these fields. |

|  |  |
| --- | --- |
| **Special values** | **Comments** |
| **Offering level:**  **Software url** | Software url can be set on offering>Process>Overview page, and OL(PN) will have default values from it. But can be overwritten on OL page for separate PNs. |
| **LF level:**  **ERO** | ERO code is optional on the LF edit page. System will validate and ensure all DSW LFs have an ERO code (except for DSW offerings with BT53 or BT62) during CFE. |
| **Rev stream level:**  **part option code PPT Suffix Order qty rounding profile Subscription tier model values Provisioning hold type Published price duration SaaS renewal type Upfront billing Monthly billing Quaterly billing Annual billing Serial number profile** | The GE can associate the **Rev stream** to a **PPT** and add / edit different sets of attributes to a revenue stream code. When creating a new offering, the offering will have default values from the **Rev stream**.   * **Suffix** * **Order qty rounding profile** * **Subscription tier model values** * **Provisioning hold type** * **Published price duration** * **SaaS renewal type** * **Upfront billing** * **Monthly billing** * **Quaterly billing** * **Annual billing** * **Serial number profile** |

[Back to Basic Concepts](#_SD-PI_Basic_Concepts)

[Back to Modify Attributes](#_Modify_Attributes)

# Appendix 7 – User Profile

The user preferences are Time zone, Dates format, Item per page and Offerings Filter.

* Display times in: UTC (Coordinated Universal Time) or in your Local workstation time zone.
* Display dates as: YYY-MM-DD, MM-DD-YYYY or DD-MM-YYYY.
* Default items per page: 20, 50 or 100.
* Default offerings filter: All offerings or My offerings.

To update user preferences, here are the steps:

1. Go to **User profile** on the left navigation bar.
2. Update user preferences and hit Save.
3. To start using the new user profile settings, immediately close down browser and re-logon to SD-PI as this will clear the browser’s cache.

[Back to top](#_SD-PI_Advanced_Functions)

# Appendix 8 – Copy Offering

Copy an offering can be done by copying from an already announced / GAed or WIP offering. It can be convenient to use this function if there are many similar data elements or product structure in the new offering. Here are the steps:

* 1. Select Offerings in the left navigation panel.
  2. Search for the offering to copy from.
  3. Check mark the offering to copy.
  4. Hit Copy selected.
  5. Add in the Number of copies wanted (up to 999 copies can be selected) and hit OK.
  6. To find the offering just copied search for the Short name \*(copy\* as each copied offering will get the prefix of (Copy x) with the name of the copied offering.

[Back to top](#_SD-PI_Advanced_Functions)

# Appendix 9 – Projects

[Back to top](#_SD-PI_Advanced_Functions)

# Appendix 10 – RTC Feedback

Detailed in the [SD-PI Introduction](http://ibmurl.hursley.ibm.com/NXIZ) document.

Source: <http://ibmurl.hursley.ibm.com/NXIZ>

[Back to Basic Concepts](#_SD-PI_Basic_Concepts)

[Back to Modify Attributes](#_Modify_Attributes)