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PeopleSoft Services Procurement 9.1 PeopleBook

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PeopleSoft Services Procurement 9.1 PeopleBook
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PeopleSoft Services Procurement Preface

This preface discusses:

- Oracle's PeopleSoft products.
- PeopleSoft application fundamentals.
- PeopleBooks and the online PeopleSoft Library.
- Pages with deferred processing.
- Common elements used in this PeopleBook.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then it either requires no additional explanation or is documented with the common elements for the section, chapter, or PeopleBook.

Oracle's PeopleSoft Products

This PeopleBook refers to these products:

- PeopleSoft eProcurement
- PeopleSoft Purchasing
- PeopleSoft Project Costing
- PeopleSoft Resource Management
- PeopleSoft Talent Acquisition Manager
- PeopleSoft Human Capital Management Human Resources
- PeopleSoft Strategic Sourcing

PeopleSoft Application Fundamentals

The *PeopleSoft Services Procurement 9.1 PeopleBook* provides you with implementation and processing information for your PeopleSoft Services Procurement system. However, additional, essential information describing the setup and design of your 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 PeopleBooks.

The following companion PeopleBooks contain information that applies specifically to PeopleSoft Services Procurement.

- *PeopleSoft Application Fundamentals PeopleBook*
- *PeopleSoft Setting Up Global Options and Reports PeopleBook*
- *PeopleSoft Setting Up and Using Commitment Control PeopleBook*
- *PeopleSoft Setting Up Procurement Options PeopleBook*
- *PeopleSoft Managing Items PeopleBook*

Pages With Deferred Processing

Several pages in PeopleSoft Services Procurement operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page. For example, if a field contains a default value, any value you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Common Elements Used In This PeopleBook

Approver	An individual who views and approves requisitions, work orders, timesheets, progress logs, expenses, or invoices. This individual is usually the requester's manager.
Business Unit	Identification code that represents a high-level organization of business information. Use a business unit to define regional or departmental units within a larger organization.
Deliverables-Based Service	Deliverables-based requisitions and work orders that reflect requirements generally performed by an entire work force, such as an entire project, not just the hours worked by a single service provider.
Department	Department that generates the service requisition and work order.
Description	Can be brief text up to 10, 15, or 30 characters, or long text up to 254 characters.
Effective Date	Date on which a table row becomes effective; the date that an action begins. This date also determines when you can view and change information. Pages and batch processes that use the information use the current row.
Invoice Date	Date the invoice was created.
Invoice Manager	Individual who has the authority to generate and manage invoices.
Invoice Number	Number assigned to invoice upon creation.
Line Number	Eligible lines associated with the requisition ID.
Multi-Resource Based Service	Multi-resource requisitions and work orders combine the features of both deliverable- and resource-based services. This provides a high-level service that controls certain elements, such as the overall not to exceed amount, as well as separate but related individual child services for each of the specific services performed to accomplish the overall task.
Project	Project ID associated with the requisition line or work order.
Rate Sheet	Rate template that is defined and associated with a requisition line service and location code.
Requester	An individual within the enterprise who can create and manage service projects, activities, requisitions and work orders, view sourcing and bid and response information. This individual can also approve timesheets, progress logs, and expenses.

Requisition	Document used to request services for qualified service providers.
Resource-Based Service	Resource requisitions and work orders enable you to request the services of an individual service provider.
Run Control ID	An identifier that, when paired with the user ID, uniquely identifies the process you are running. In addition, it enables important parameters to be available for a process when it runs. This ensures that when a process runs in the background, it does not have to prompt you for any additional values. All parameters are stored within the system and associated with run control IDs and user IDs.
Scope of Work	Description of the work to be performed by the service provider.
Service	Identifies the job to be performed by the service provider who fills the position.
Service Coordinator	Individual working with both the requester and the supplier to fill the requisition request.
Service Provider	Candidate submitted to fill the work order.
Service Provider Contact	Individual submitting the qualified bid.
Service Provider Identifier	User-defined attributes that uniquely identify an individual service provider, such as passport number, driver's license number, or social security number.
Service Provider Roster	List of active and inactive service providers associated with a service provider contact.
SetID	Identification code that represents a set of control table information or TableSets. A TableSet is a group of tables (records) necessary to define the company's structure and processing options.
Sourcing	Process used to send requisitions to suppliers in an effort to fill a requirement.
Status	Indicates whether a row in a table is *Active* or *Inactive.* You cannot display inactive rows on transaction pages or use them for running batch processes. The *Inactivate* value also enables you to maintain an audit trail of data you no longer use.
Supplier Network	Collection of one or more suppliers associated with a business unit that is involved in the services procurement process.
Services Template	Defines the time and progress reporting defaults for the structure and attributes to be used when entering time, expenses, and progress for the business unit.
User ID	System identifier for the individual who generates a transaction.

Visibility	Determines whether an activity is considered public or private. Private activities are not visible when non-involved parties view timesheet information.
Work Order	Specifies the basic terms and conditions of a project. This is also known as the Statement of Work.
	Navigates to the selected record in edit mode.

Chapter 1

Getting Started with PeopleSoft Services Procurement

This chapter discusses:

- PeopleSoft Services Procurement business processes.
- Delivered user roles.
- PeopleSoft Services Procurement integrations.
- PeopleSoft Services Procurement implementation.

PeopleSoft Services Procurement Business Processes

PeopleSoft Services Procurement provides these business processes:

- Fulfillment facilitates the procurement process and provides the ability to capture role and skill specific requisitions, source the requisition to suppliers in the supplier network, and qualify and procure service providers.
- Administration enables management of the ongoing work process by providing project and activity definition and enabling service providers to log time and status information.
- Settlement extends services administration by providing a self-invoicing ability and creating invoices based on approved timesheets, progress logs, and expenses.
- Analytics runs interactive reports against a data mart. The reports analyze supplier information to help manage your services spend.

We discuss these business processes in the business process chapters in this PeopleBook.

Delivered User Roles

The PeopleSoft system delivers the following access for user roles:

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Users and Team Setup, page 125.

User Role	***Access***
Requester	• Maintain services projects. • Maintain services activities. • Create requisitions. • Manage requisitions. • Review and source requisitions (read-only). • Review bids. • View scheduled interviews (read-only). • Rate interviews. • Manage work orders. • Maintain time and expenses (read-only). • Maintain progress logs. • View provider roster (read-only). • View provider performance (read-only). • View provider length of stay (read-only). • View expense life cycle (read-only). • View expense variance (read-only). • View supplier performance (read-only). • View supplier rate comparison (read-only). • View minority-owned suppliers (read-only).

User Role	***Access***
Service Coordinator	• Review and source requisitions and work orders. • Schedule interviews. • Assess bids. • Manage work orders (if allowed on service coordinator defaults). • View provider roster (read-only). • View provider performance (read-only). • View provider length of stay (read-only). • View expense life cycle (read-only). • View expense variance (read-only). • View supplier performance (read-only). • View supplier rate comparison (read-only). • View minority-owned suppliers (read-only).
Service Provider Contact	• Review requisitions and submit bids. • Maintain communications. • Manage service providers. • Maintain service provider contacts (supplier administrators only). • Maintain time and expenses (read-only). • Maintain time and expense as proxy. • Maintain progress logs. • Approve invoices.
Service Provider	Maintain time and expenses.

User Role	***Access***
Executive	• View provider roster (read-only). • View provider performance (read-only). • View provider length of stay (read-only). • View expense life cycle (read-only). • View expense variance (read-only). • View supplier performance (read-only). • View supplier rate comparison (read-only). • View minority-owned suppliers (read-only).
Invoice Manager	• Manage invoices. • Create batch invoices. • Print invoices. • Export invoices to PeopleSoft Payables.

User Role	***Access***
Administrator	• Define PeopleSoft Services Procurement installation options. • Create PeopleSoft Purchasing business units. • Create PeopleSoft Services Procurement business units. • Create PeopleSoft Project Costing business units. • Define automatic numbering. • Define currency codes. • Define departments. • Define locations. • Build Verity Search Index. • Define ship to locations. • Define units of measurement. • Define work order logistical tasks. • Define task groups. • Define tasks by task group. • Define task groups by service type. • Define project types. • Define supplier information. • Define supplier network. • Define competency types. • Define competencies. • Assign competencies to set IDs. • Define service suppliers by region. • Define supplier by region and service type.

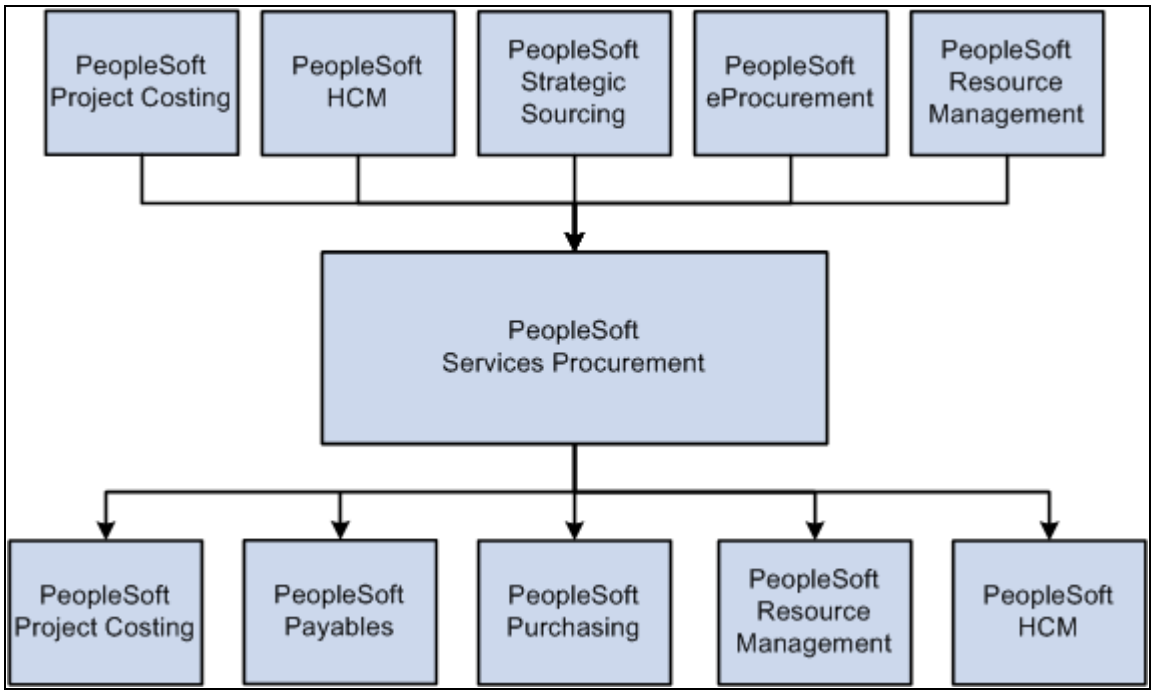
User Role	***Access***
Administrator continued	• Define suppliers by service. • Define supplier by region and service. • Define service provider identifiers. • Define requester user. • Register service coordinators. • Register provider contacts. • Register service providers. • Register Administrators • Register Approvers • Define user preferences. • Set up role actions. • Maintain workflow. • Maintain workflow notifications. • Define automatic sourcing. • Maintain email notification definition. • Define procurement region codes. • Maintain rate sheets. • View rate sheet list. • Define services. • Define service types. • Define service attributes. • Define multi-resource assignments.

User Role	***Access***
Administrator continued	• Define services by service type. • Define service type by service. • Define service activities. • Define Project Activities (Project Costing installed). • Define Activities by Service Type (Project Costing not installed). • Define activities by service. • Define response types. • Set up surveys. • Define surveys by service type. • Define VMS by business unit and service type. • Define payment terms timing. • Define single payment terms. • Define multiple payment terms. • Establish an accounts payable interface. • Define time and expense templates. • Define expense business purpose. • Define expense distance rate. • Define expense type.

User Role	*Access*
Administrator continued	• Define expense payment type. • Define expense location. • Maintain preferred merchant. • Define time reporting codes. • Define pay types. • Define markups by service type. • Define markups by procurement region. • Create bid factors. • Create bid factor mapping. • Define performance level code. • Define supplier scoring rule. • Define Service Request Type. • Define Role Distribution List. • Define Service Teams. • Define Teams by Region/Service Type. • Define Rating Models. • Define Experience.

PeopleSoft Services Procurement Integrations

PeopleSoft Services Procurement integrates with these PeopleSoft applications:



PeopleSoft Services Procurement Integration with other PeopleSoft Applications

While PeopleSoft Services Procurement can run independently, it does leverage the investment through integration with other PeopleSoft applications, as well as third-party applications.

We discuss integration considerations in the implementation chapters in this PeopleBook.

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

PeopleSoft Payables

PeopleSoft Payables seamlessly integrates the supplier settlement process. PeopleSoft Services Procurement populates staging tables with services invoicing data, and you run the Voucher Build to generate vouchers for disbursement.

See Chapter 7, "Integrating with Other PeopleSoft and Third-Party Applications," Integrating with Accounts Payables Applications, page 217.

PeopleSoft Project Costing

PeopleSoft Project Costing shares project and activity data with PeopleSoft Services Procurement, including time and expenses. This enables you to include information on service providers in the project reporting.

When the provider logs time and expenses, you can link back to the project set up in PeopleSoft Project Costing for reporting purposes.

PeopleSoft Purchasing

You can generate PeopleSoft Purchasing purchase orders from work orders. The approved purchase order amount is stored on the work order and is consumed during the invoicing process. It is also possible to use purchase contracts with services when the purchasing integration is activated

See Chapter 7, "Integrating with Other PeopleSoft and Third-Party Applications," Integrating with PeopleSoft Purchasing, page 222.

PeopleSoft Resource Management

PeopleSoft Resource Management provides an end-to-end solution for managing services spend and for maximizing the value obtained from those services. PeopleSoft Services Procurement integrates with PeopleSoft Resource Management, enabling internal services orders to become a valid external service purchasing request. This enables enterprises to better use internal workforces before bringing in external resources.

If a requisition is filled in PeopleSoft Services Procurement, the system updates the PeopleSoft Resource Management service order fulfillment quantity by incriminating it by one. Also, the system creates a PeopleSoft Resource Management assignment upon work order release.

See Chapter 7, "Integrating with Other PeopleSoft and Third-Party Applications," Integrating With PeopleSoft Resource Management, page 223.

PeopleSoft Strategic Sourcing

You can integrate with PeopleSoft Strategic Sourcing for the following bid management functionality while sourcing:

- Define submittal rating criteria in the form of a bid factor that is defined in Strategic Sourcing.
- Associate multiple bid factors as selection criteria in requisitions.
- Rate supplier submittals based on predefined weightings.
- Sort and manage the score.
- Analyze bids and awards.

PeopleSoft Human Capital Management

When you install both Supply Chain Management and Human Capital Management database structures, you can configure the system to use the HCM database as the system of record and initiate consistent terminology between the PeopleSoft Services Procurement and PeopleSoft HCM applications. You can also use Services Procurement from Talent Acquisition Manager as a source for filling job postings.

See Appendix C, "PeopleSoft Human Capital Management Integration," page 671.

PeopleSoft Services Procurement Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for the organization based on the features 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 PeopleBook documentation.

PeopleSoft Services Procurement also provides component interfaces to help you load data from the existing system into PeopleSoft Services Procurement tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have component interfaces:

Component	*Component Interface*	*Reference*
Competencies	RS_COM_COMPTNCY_TBL	See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Service Setup, page 80.
Project Costing Options	PROJECT_BU_OPTIONS	See Chapter 4, "Setting Up PeopleSoft Services Procurement," Setting Up Business Unit Definitions, page 32.
Preferred Merchant	EX_MERCHANT_SETUP	See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Settlement Setup, page 170.
Expense Location	EX_LOCATION_SETUP	See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Settlement Setup, page 170.
Distance Rate	EX_AUTO_RATE_SETUP	See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Settlement Setup, page 170.
Add Vendors	EM_VENDOR_CI	See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Defining Service Supplier Setup, page 108.
Rate Sheet	SPB_RATESHEET	See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Rate Sheets, page 95.
Requester Setup	REQUESTOR_TBL_CI	See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Users and Team Setup, page 125.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise Application Fundamentals 9.1 PeopleBook*, with information about where to find the most current version of each.

See Also

PeopleSoft Application Fundamentals 9.1 PeopleBook, "PeopleSoft Application Fundamentals PeopleBook Preface"

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

Chapter 2

Navigating in PeopleSoft Services Procurement

This chapter discusses how to navigate in PeopleSoft Services Procurement.

Navigating In PeopleSoft Services Procurement

PeopleSoft Services Procurement provides custom functional area navigation pages that contain groupings of folders that support a specific business process, task, or user role.

Note. In addition to the PeopleSoft Services Procurement custom navigation pages, PeopleSoft provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

Pages Used to Navigate in PeopleSoft Services Procurement

This table lists the custom navigation pages that are used to navigate in PeopleSoft Services Procurement.

Define Services Procurement

The Define Services Procurement custom navigation pages are geared to the person in the organization who is focused on setting up PeopleSoft Services Procurement business processes.

Page Name	*Navigation*	*Usage*
Define Services Procurement	Services Procurement, Define Services Procurement	Access primary PeopleSoft Services Procurement menu options and activities.
General Setup	Click General Setup on the Define Services Procurement page.	Maintain installation options, business units, system wide and project/activity definitions.
Business Unit Definitions	Click Business Unit Definitions on the General Setup page.	Maintain Business Unit definitions for Services Procurement-related applications.
Project/Activity Definitions	Click Project/Activity Definitions on the General Setup page.	Maintain project types, projects and activities.

Page Name	*Navigation*	*Usage*
System-Wide Definitions	Click System-Wide Definitions on the General Setup page.	Maintain locations and other definitions that affect multiple applications.
Service Setup	Click Service Setup on the Define Services Procurement page.	Maintain service setup for requisitions and work orders
Competency Setup	Click Competency Setup on the Service Setup page.	Maintain competencies and associate them to a competency types and set IDs. Maintain rating models.
Rate Sheet Setup	Click Rate Sheet Setup on the Service Setup page.	Maintain rate sheets and rate sheet lists.
Service (Project Role) Setup	Click Service (Project Role) Setup on the Service Setup page.	Maintain services (project roles) and associated service types. Maintain experience values
Service Type Setup	Click Service Type Setup on the Service Setup page.	Maintain service types for both resource and deliverable services. Maintain Surveys by Service Type.
Survey Setup	Click Survey Setup on the Service Setup page.	Maintain response types, work order surveys and service types for a survey.
Tasks and Task Group Setup	Click Tasks and Task Group Setup on the Service Setup page.	Maintain logistical tasks and task groups for work orders and associate them to service types.
Service Supplier Setup	Click Service Supplier Setup on the Define Services Procurement page.	Define vendor as a services supplier.
Deliverable Service Setup	Click Deliverable Service Setup on the Service Supplier Setup page.	Maintain services, suppliers and regions for deliverable services.
Resource Service Setup	Click Resource Service Setup on the Service Supplier Setup page.	Maintain service types, suppliers and regions for resource services.
Settlement Setup	Click Settlement Setup on the Define Services Procurement page.	Maintain time and expense reporting, invoicing and other settlement options.
Invoicing Setup	Click Invoicing Setup on the Settlement Setup page.	Maintain payment terms and accounts payable interface.
Time and Expense Setup	Click Time and Expense Setup on the Settlement Setup page.	Maintain time and expense reporting options.
Sourcing Setup	Click Sourcing Setup on the Define Services Procurement page.	Define automatic sourcing rules and bid factors, markups, and scoring for evaluating suppliers.

Page Name	***Navigation***	***Usage***
Bid Factor Setup	Click Bid Factor Setup on the Sourcing Setup page.	Maintain bid factors, bid factor groups, and associate them to attributes and categories.
Pay Types and Markups Setup	Click Pay Types and Markups Setup on the Sourcing Setup page.	Maintain pay types and markups for a service type and associate them to a region.
Supplier Scoring Setup	Click Supplier Scoring Setup on the Sourcing Setup page.	Maintain performance levels and scoring rules for evaluating suppliers.
User and Team Setup	Click User and Team Setup on the Define Services Procurement page.	Maintain users and define service teams.
Workflow Setup	Click Workflow Setup on the Define Services Procurement page.	Maintain approval processes, notifications and templates related to workflow.
Reconciliations	Click Reconciliations on the Define Services Procurement page.	Close requisitions and purchase orders related to Services Procurement.

Chapter 3

PeopleSoft Services Procurement Portal Pagelets

This chapter provides an overview and discusses how to:

- Use pagelets by functional role.
- View and use PeopleSoft Services Procurement pagelets.

Understanding PeopleSoft Services Procurement Pagelets

PeopleSoft Services Procurement provides portal pagelets for the corporate intranet home pages. These pagelets provide access to key data and transactions within PeopleSoft Services Procurement for use in employee portal registries.

Portal pagelets reduce the number of clicks that it takes a user to complete major tasks in PeopleSoft Services Procurement. These pagelets are user-friendly and enable users to gain quick access to relevant data from the transaction or analysis system. Pagelets can either be grids or graphs and contain the most recent transactions or high priority items. You can configure the portal homepage to display narrow or wide grid pagelets.

Grid Pagelets: Present data in a PeopleSoft grid. Each pagelet displays the services procurement page name, key attributes, and links to the corresponding services procurement edit page.

Graph Pagelets: Visual representations of services procurement data in chart format. The services procurement ID and the metric attributes represent the X-axis and Y-axis of the chart respectively.

the employees can personalize the portal homepage by adding the pagelets that they need. Standard PeopleSoft role-based security ensures that users can access only the pagelets appropriate to their roles.

the employees can configure their portal homepage with three narrow columns or one narrow and one wide column. Some pagelets have both a narrow and a wide version, each with its own object name. When you see two object names for a pagelet, the first one refers to the narrow version.

You can also design your own pagelets when the installation includes PeopleSoft Portal.

Pagelet Security

Similar to page access, you control pagelet security at the component level by associating it with a permission list (which is then associated with a role). Each pagelet has its own component to enable more granular access. (You can ascertain a pagelet's component name in PeopleSoft Application Designer by searching for definition references to the page's system or object name.)

Pagelets are grouped into functional roles as an example of how to organize access. Create the proper permission lists and associate them with actual role definitions before your users can access them, or use the permission list definitions that PeopleSoft provides with the delivered sample data. You can use these sample data security objects (roles and permission lists) as an example of how to set up pagelet access.

Using Pagelets by Functional Role

These role groupings are examples of how to organize pagelet access according to function.

This section discusses employee-facing pagelets according to sample roles:

- Requester
- Service Coordinator
- Approver

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Users and Team Setup, page 125

Requester

Requesters have access to all pagelets and information including recent requisitions, interview schedules, recent work orders timesheets, and progress logs awaiting approval.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Service Requester Defaults, page 141

Service Coordinator

Service coordinators can view pagelets that display recent work orders, expenses nearing limits, supplier analysis, and the supplier headcount chart.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Service Coordinator Defaults, page 143

Approver

Approvers can access the pagelets for timesheets and progress logs awaiting approval.

Viewing and Using PeopleSoft Services Procurement Pagelets

This section discusses pagelets that are available for employees to view services procurement information.

Pages Used to View and Use PeopleSoft Services Procurement Pagelets

Available Services Procurement pagelets include:

- Interview Schedule pagelet.
- Recently Created Requisitions pagelet.
- Recent Work Order pagelet.
- Timesheet Approval pagelet.
- Progress Logs Approval pagelet.
- Logistical Tasks pagelet.
- Expense Variance Chart pagelet.
- Supplier Headcount pagelet.
- Supplier Analysis pagelet.
- Requisition Approval pagelet.
- Work Order Approval pagelet.
- Invoice Approval pagelet.

This table provides details on PeopleSoft Services Procurement pagelets.

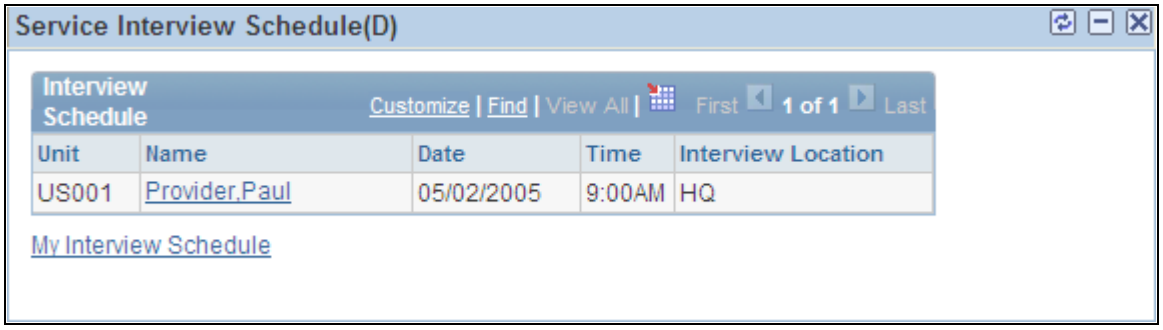
Pagelet Name	*Roles*	*Usage*
Service Interview Schedule	Requester	Provides a synopsis of the scheduled interviews. See Chapter 17, "Assessing and Awarding Bids," Creating and Maintaining Interview Schedules, page 409.

Pagelet Name	***Roles***	***Usage***
Recent Service Requisitions (SPF_E_RCNTRQ)	Requester	Displays the five most recent requisitions that you created. See Chapter 14, "Creating and Managing Services Procurement Requisitions," page 285.
Recent Service Work Orders (SPF_E_RCNTWO)	Requester, Service Coordinator	Displays the five most recent work orders requiring action with statuses of *Created*, *Submitted*, and *Approved*. See Chapter 18, "Managing Work Orders," page 413.
Service Timesheets Approval (SPA_E_TIMAPR)	Requester, Approver	Displays the timesheets and amounts including expenses that are awaiting approval. See Chapter 19, "Managing Time in PeopleSoft Services Procurement," page 477.
Service Progress Logs Approval (SPA_E_PLGAPR)	Requester, Approver	Displays progress logs that need approval if you are using a deliverables-based payment system. See Chapter 21, "Managing Progress Logs," page 545.
Logistical Tasks (SPF_E_LGTASK)	Requester	Displays the five most recent activities that need to be completed before a work order can be released. See Chapter 18, "Managing Work Orders," Viewing Logistical Tasks, page 458.
Service Expense Variance Chart (SPR_E_EXPLIM)	Requester, Service Coordinator	Provides a summary graph of total amount spent compared to total work order amount. This is listed in a bar chart by work order. See Chapter 22, "Managing Settlements," page 559.
Service Supplier Headcount (SPR_E_SUPCNT)	Requester, Service Coordinator	Displays the top five suppliers by headcount in a graphical format. See Chapter 24, "Interactive Reports in PeopleSoft Services Procurement," Analyzing Service Provider Rosters, page 621.

Pagelet Name	*Roles*	*Usage*
Service Supplier Analysis (SPR_E_SUPANALYZ)	Service Coordinator	Provides a method to compare suppliers based upon supplier performance, service provider performance, and rate. See Chapter 24, "Interactive Reports in PeopleSoft Services Procurement," Analyzing Service Provider Performance, page 624.
Service Requisition Approval	Requester, Approver	Displays the requisitions that are awaiting approval. See Chapter 14, "Creating and Managing Services Procurement Requisitions," Approving and Denying Requisitions, page 326.
Service Work Order Approval	Requester, Service Coordinator, Approver	Displays the work orders that are awaiting approval. See Chapter 18, "Managing Work Orders," Submitting and Approving Work Orders, page 470.
Service Invoice Approval		Displays the invoices that are awaiting approval. See Chapter 22, "Managing Settlements," Approving Invoices, page 588.
Create New Time Sheet	Service Provider, Proxy	Allows creation of new timesheets.
Active Time Sheets	Service Provider, Proxy, Time Approver	Provides view of timesheets that are currently awaiting action. For example, status of open or denied for Service Provider or status of submitted for Time Approver).
Time Sheet History	Service Provider, Proxy, Time Approver	Provides view of all timesheets regardless of status.
Create New Expense Sheet	Service Provider, Proxy, Service Provider Contact	Allows creation of new expense sheets.
Active Expense Sheets	Service Provider, Proxy, Service Provider Contact, Expense Approver	Provides view of expense sheets that are currently awaiting action. For example, status of open or denied for Service Provider or status of submitted for Expense Approver).
Expense Sheet History	Service Provider, Proxy, Service Provider Contact, Expense Approver	Provides view of all expense sheets regardless of status.

Viewing the Services Interview Schedule Pagelet

Access the Services Interview Schedule pagelet.



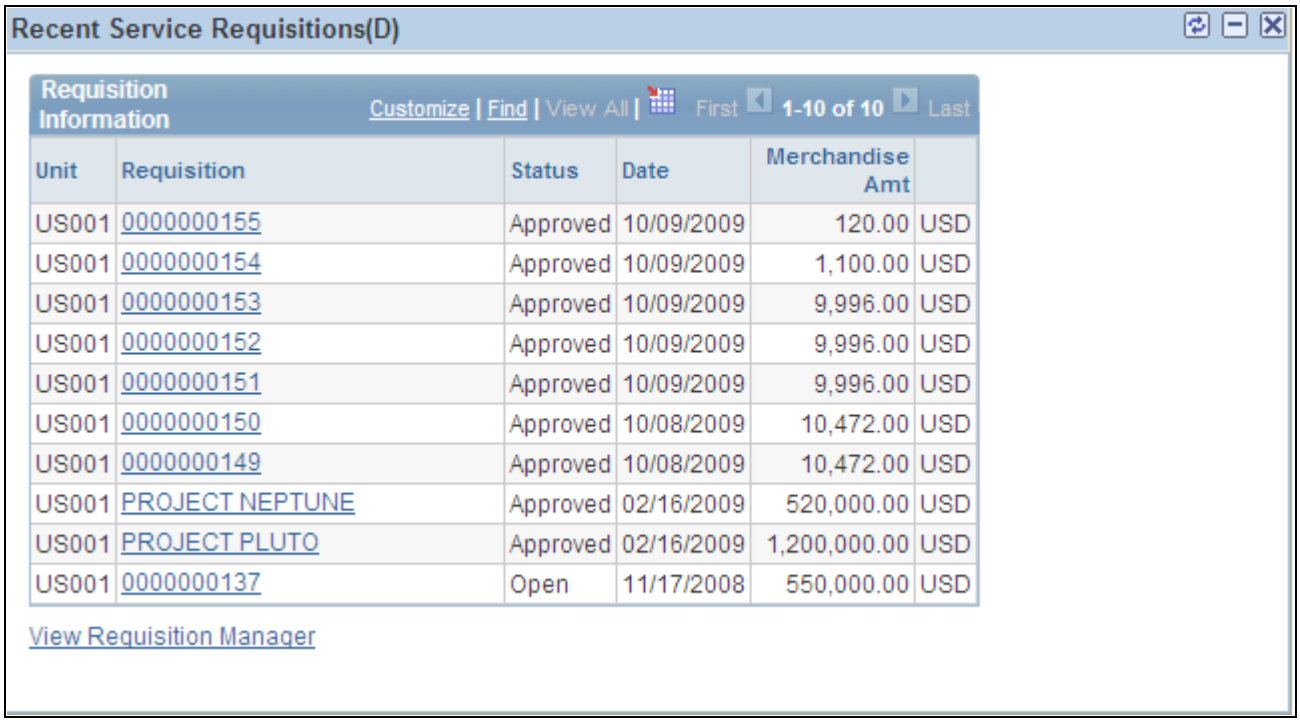
Interview Schedule pagelet

Use this pagelet to view the following schedule details: candidate, date, time of interview and location. The 10 interview dates that are closest to the current date appear in ascending order. You can perform the following tasks on the Interview Schedule pagelet:

- Click the name of a candidate to access the interview schedule for the candidate.
- Click My Interview Schedule to access the list of user interviews. The system pulls up this list based on user ID.

Viewing the Recent Service Requisitions Pagelet

Access the Recent Service Requisitions pagelet.



Recent Service Requisitions(D)

Requisition Information Customize | Find | View All | First 1-10 of 10 Last

Unit	Requisition	Status	Date	Merchandise Amt	
US001	0000000155	Approved	10/09/2009	120.00	USD
US001	0000000154	Approved	10/09/2009	1,100.00	USD
US001	0000000153	Approved	10/09/2009	9,996.00	USD
US001	0000000152	Approved	10/09/2009	9,996.00	USD
US001	0000000151	Approved	10/09/2009	9,996.00	USD
US001	0000000150	Approved	10/08/2009	10,472.00	USD
US001	0000000149	Approved	10/08/2009	10,472.00	USD
US001	PROJECT NEPTUNE	Approved	02/16/2009	520,000.00	USD
US001	PROJECT PLUTO	Approved	02/16/2009	1,200,000.00	USD
US001	0000000137	Open	11/17/2008	550,000.00	USD

View Requisition Manager

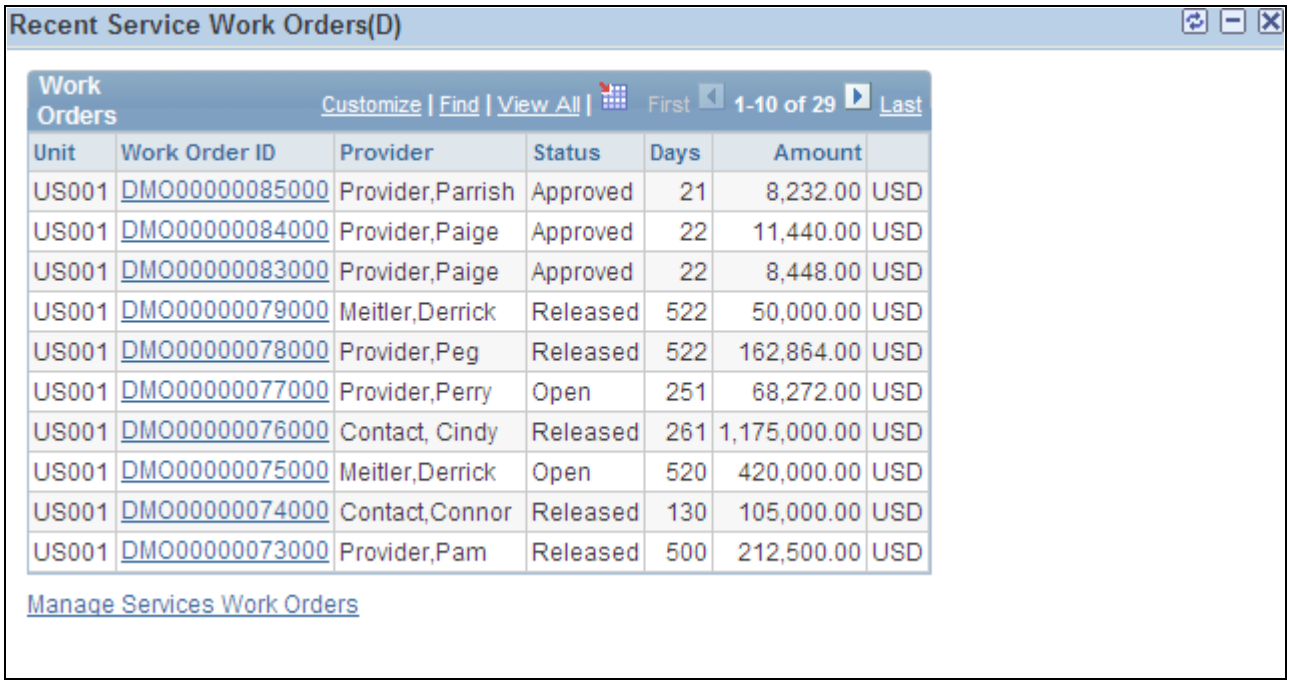
Recent Service Requisitions pagelet

Use this pagelet to view the following requisition details: business unit, requisition ID, status date, amount, and currency code. The 10 requisitions that are closest to the current date appear in ascending order. You can perform the following tasks on the Recent Requisition pagelet:

- Click the Requisition ID link to access the Requisition Details page.
- Click the View Requisition Manager link to access the Requisition Manager page.

Viewing the Recent Service Work Orders Pagelet

Access the Recent Work Orders pagelet.



Recent Service Work Orders(D)

Work Orders Customize | Find | View All | First 1-10 of 29 Last

Unit	Work Order ID	Provider	Status	Days	Amount	
US001	DMO00000085000	Provider,Parrish	Approved	21	8,232.00	USD
US001	DMO00000084000	Provider,Paige	Approved	22	11,440.00	USD
US001	DMO00000083000	Provider,Paige	Approved	22	8,448.00	USD
US001	DMO00000079000	Meitler,Derrick	Released	522	50,000.00	USD
US001	DMO00000078000	Provider,Peg	Released	522	162,864.00	USD
US001	DMO00000077000	Provider,Perry	Open	251	68,272.00	USD
US001	DMO00000076000	Contact, Cindy	Released	261	1,175,000.00	USD
US001	DMO00000075000	Meitler,Derrick	Open	520	420,000.00	USD
US001	DMO00000074000	Contact,Connor	Released	130	105,000.00	USD
US001	DMO00000073000	Provider,Pam	Released	500	212,500.00	USD

Manage Services Work Orders

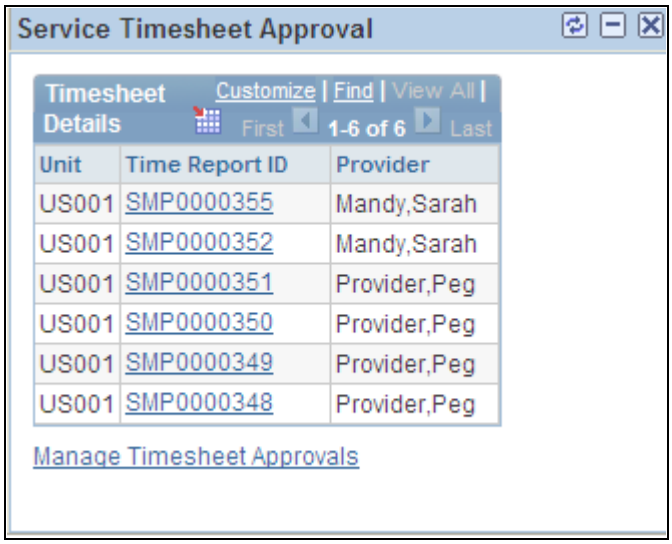
Recent Service Work Orders pagelet

Use this pagelet to view the 10 most recent open work orders. The Work Order pagelet displays the provider name, status, work duration, and work order amount and displays the data sorted by start date in ascending order. The work order status could either be *Created*,*Submitted*, or *Approved.* You can perform the following tasks on the Recent Work Orders pagelet:

- Click a work order ID to navigate to the selected work order.
- Click View Work Order Roster to access the Services Work Order roster page.

Viewing the Service Timesheet Approval Pagelet

Access the Service Timesheet Approval pagelet.



Timesheet Approvals pagelet

Use this pagelet to view the following details for the 10 most recent timesheets with the total amount that are awaiting approval: timesheet ID, provider name, date, and total amount. The timesheet data are sorted by end date in ascending order; therefore, timesheets awaiting approval the longest appear first. You can perform the following tasks using the Timesheet Approvals pagelet:

- Click the Time Report ID link to access specific transaction details and approve the timesheet.
- Click View Timesheet Roster to access the Maintain Services Time/Expense page.

Viewing the Service Progress Log Approvals Pagelet

Access the Service Progress Log Approvals pagelet.

Use this pagelet to view the 10 most recent progress logs awaiting approval. The progress logs display the following details: progress log ID, supplier, date, and amount. The progress log approval data are sorted by end date in ascending order; therefore, progress logs awaiting approval the longest appear first. Also, upon login to the portal page, progress logs with a deliverables-based payment system, instead of a resource-based payment system, can be monitored to find out which ones need approval. You can perform the following tasks using the Progress Log Awaiting Approval pagelet:

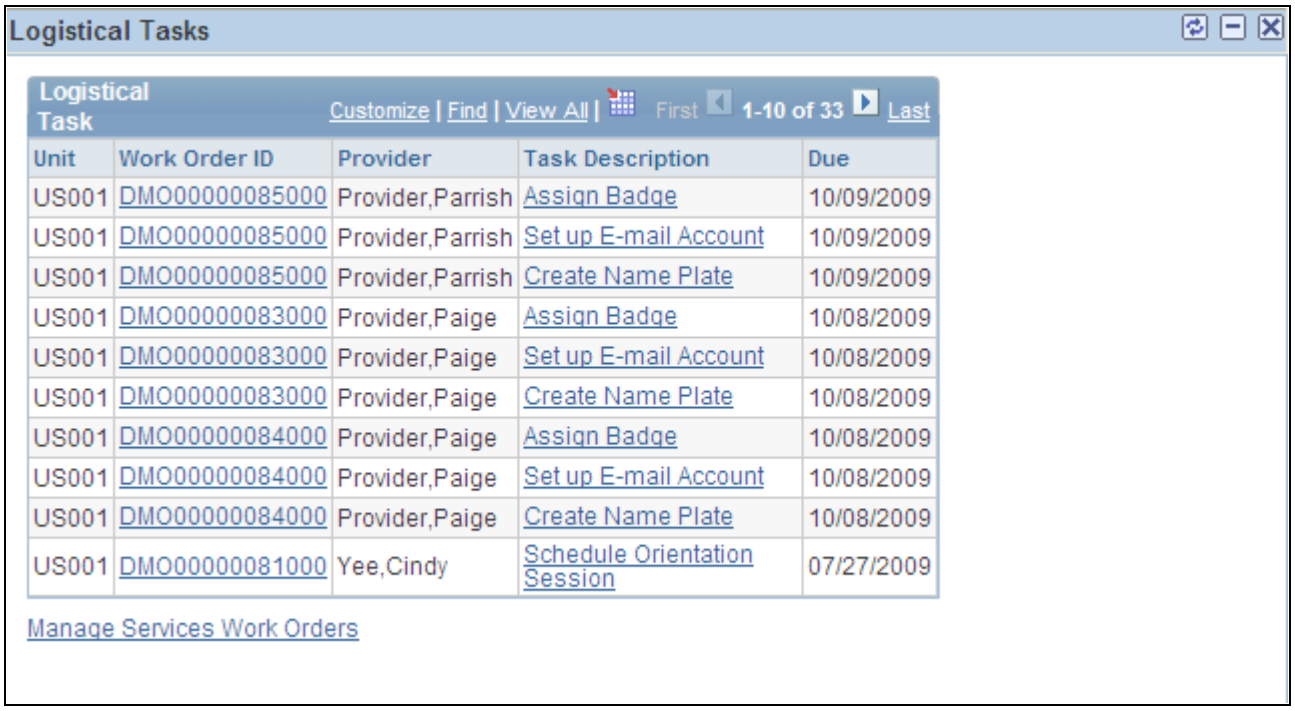
- Click the Progress Log ID link to access details of a specific transaction and approve that item.
- Click the View Progress Log Roster link to access the Maintain Services Progress Log page.

See Also

Chapter 21, "Managing Progress Logs," page 545

Viewing the Logistical Tasks Pagelet

Access the Logistical Tasks pagelet.



Logistical Tasks pagelet

Use this pagelet to view the 10 most recent pending activities to release a work order. The Logistical Tasks pagelet displays the following details: work order ID, provider, and description. The data appears with work order IDs in ascending order. You can perform the following tasks using the Logistical Tasks pagelet:

- Click the Work Order ID link to access the Service Work Order Details page where you can view and edit the logistical task list.
- Click View Work Order Roster to access the Manage Services Work Order page.

See Also

Chapter 18, "Managing Work Orders," Viewing Logistical Tasks, page 458

Viewing the Services Expense Variance Chart Pagelet

Access the Expense Variance Chart pagelet.

The Services Expense Variance Chart pagelet provides a summary graph of the five most recent active work orders with variance amounts. The graphs display the total amount spent on a work order versus the total work order amount. You can visually compare the variance amount between the two and act on the work order, as appropriate. The total amount spent for each work order is based on approved billable time and expenses or progress log amounts and does not take into consideration whether they have been invoiced.

See Also

Chapter 24, "Interactive Reports in PeopleSoft Services Procurement," Analyzing Expense Variance, page 633

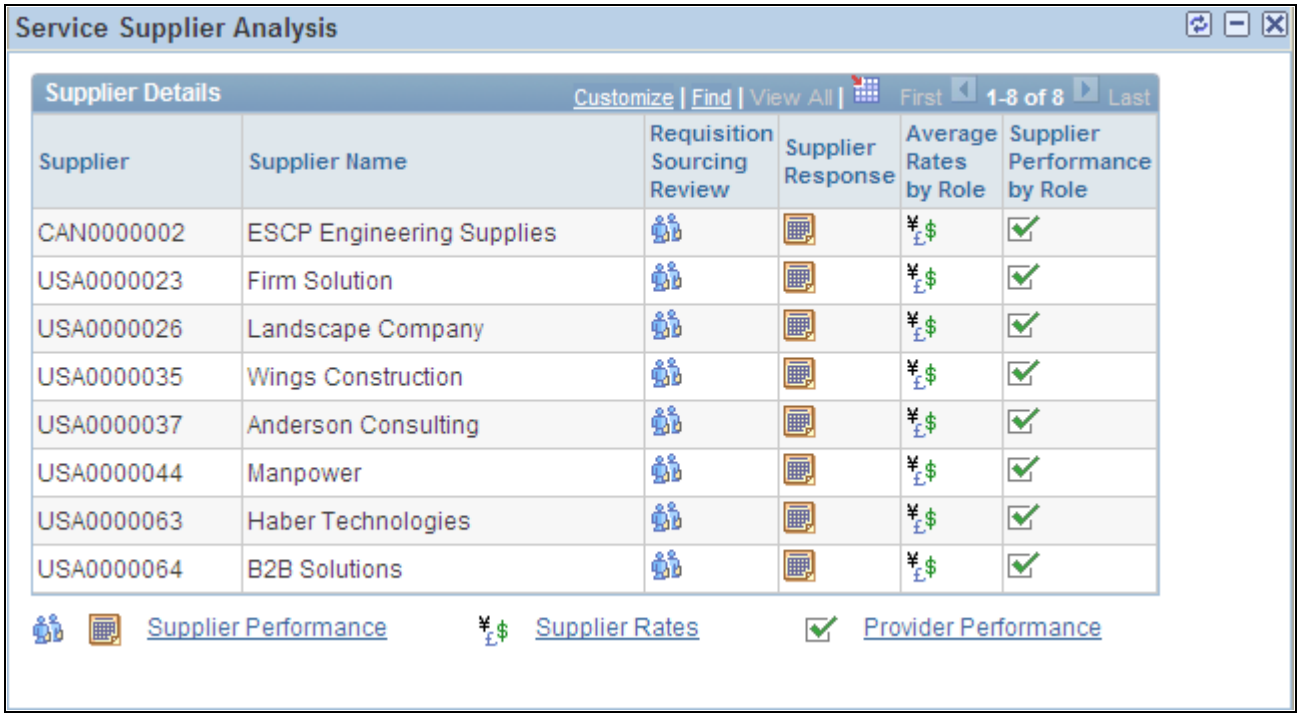
Viewing the Supplier Headcount Chart Pagelet

Access the Supplier Headcount Chart pagelet.

The Supplier Breakdown by Headcount pagelet displays the five top suppliers and the headcount for each supplier.

Viewing the Services Supplier Analysis Pagelet

Access the Services Supplier Analysis pagelet.



Services Supplier Analysis pagelet

	Click to access the Supplier Sourcing Review popup report.
	Click to access the Supplier Response popup report.
	Click to access the Average Rates by Role popup report.
	Click to access the Supplier Performance by role popup report.

Viewing the Requisition Approval Pagelet

Access the Requisition Approval pagelet.

Use this pagelet for quick access to requisitions that require approval. This pagelet navigates you to the Requisition Approval page when you click the Requisition ID/Name. You can also select the Manage Approvals link to navigate to the main Manage Approvals page. This pagelet displays Business Unit, Requisition ID/Name and Line Number. The detail pagelet also displays this information, plus Requisition Date, Requisition Line Amount and Currency.

See Also

Chapter 14, "Creating and Managing Services Procurement Requisitions," page 285

Viewing the Work Order Approval Pagelet

Access the Work Order Approval pagelet.

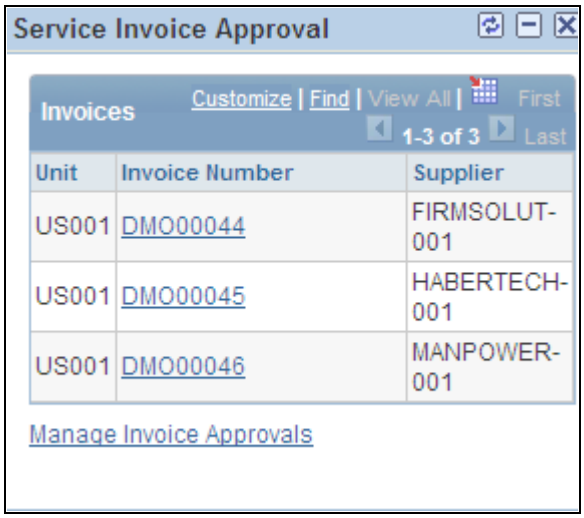
Use this pagelet to view work orders that require approval. You can select the work order ID to access the Work Order Approval page. You can also select the Manage Services Work Orders link to Navigate to the Work Order Roster. This pagelet displays Business Unit, Work Order ID and Service Provider name. The detail pagelet adds Duration Days, Work Order Amount and Currency to the list of columns.

See Also

Chapter 18, "Managing Work Orders," page 413

Viewing the Service Invoice Approval Pagelet

Access the Service Invoice Approval pagelet.



Service Invoice Approval pagelet

Use this pagelet to view a list of invoices that require approval. When you click the Invoice Number, you automatically access the Invoice Approval Page. Additionally, you can click the Manage Invoice Approvals to navigate to the Invoice Approval Roster page. This pagelet includes 3 columns: Business Unit, Invoice Number and Supplier. The detail pagelet show the same columns plus Invoice Date, Invoice Amount and Currency Code.

See Also

Chapter 22, "Managing Settlements," page 559

Chapter 4

Setting Up PeopleSoft Services Procurement

This chapter provides an overview of the PeopleSoft Services Procurement implementation process and discusses how to:

- Set up business unit definitions.
- Define system-wide definitions.
- Define project and activities definitions.
- Establish Services Procurement ChartField Security

Understanding the PeopleSoft Services Procurement Implementation Process

PeopleSoft applications rely on tables to store not only business transactions, but also the structure and processing rules that drive a system. Before you begin, set up the basic framework by using pages that you access from the Define Services Procurement page.

Because of the relational design of PeopleSoft applications, the order in which you use the online pages to set up the database tables does not necessarily reflect the order in which you make important decisions regarding the use of the application. Although certain tables work as a group when you make processing or implementation decisions, you must establish data in some tables before others.

Implementation Order

To set up PeopleSoft Services Procurement:

1. Set up installation options.
2. Define general options.
3. Create business units.
4. Define bid factors.
5. Define competencies.
6. Define services, project roles, service types, and service activities.

7. Define rate sheets.
8. Define settlements.
9. Define projects.
10. Configure time and expense.
11. Set up users.
12. Configure the supplier network.
13. Define suppliers by service type and region.
14. Set up logistical tasks.
15. Set up file attachment servers.

Note. This list represents the full implementation order of the PeopleSoft Services Procurement fulfillment process. Although many of the steps are documented in this chapter, the greatest majority of this list is described and documented in the "Setting Up Application Specific Options for PeopleSoft Services Procurement" chapter. Please refer to that chapter for more information about the system setup.

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," page 79.

See Also

PeopleSoft Application Fundamentals 9.1 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Defining Services Procurement Installation Options

Setting Up Business Unit Definitions

To create Strategic Sourcing business units, use the Sourcing - Business Unit Definition (BUS_UNIT_C_A1) component.

To create PeopleSoft Services Procurement business units, use the Services Procurement Bus Unit (BUS_UNIT_TBL_SP) component.

To create PeopleSoft Purchasing business units, use the Purchasing - Business Unit Definition (BUS_UNIT_PM) component. To create PeopleSoft Purchasing business unit options, use the Purchasing Business Unit (BUS_UNIT_OPT_PM) component.

To create Project Costing definitions, use the Project Costing Definition (PC_BU_DEFN) component.

To set up Project Costing options, use the Project Costing Options (PC_BUS_UNIT_OPT) component. Use the PROJECT_BU_OPTIONS component interface to load data into the tables for this component.

This section provides an overview of the PeopleSoft Purchasing-related business units and discusses how to:

- Define PeopleSoft Strategic Sourcing business units.
- Define PeopleSoft Purchasing business units.

- Define PeopleSoft Services Procurement business units.
- Define work order settings.
- Set up reason codes.
- Define PeopleSoft eProcurement business units.
- Set up Project Costing definitions.
- Setting up Project Costing options.

Understanding the PeopleSoft Purchasing-Related Business Units

A business unit is an operational subset of an organization. It tracks and maintains its own set of requisitions, work orders, and purchase orders (POs). Each business unit has its own way of storing information and its own processing guidelines.

In PeopleSoft Services Procurement, you define business-unit-specific attributes. When you define the PeopleSoft Services Procurement attributes, the available business units include those business units already defined in PeopleSoft Purchasing. The PeopleSoft Services Procurement business unit table is an extension of the PeopleSoft Purchasing business unit table.

Pages Used to Set Up Business Unit Definitions

Page Name	*Definition Name*	*Navigation*	*Usage*
Strategic Sourcing Business Unit Definition	BUS_UNIT_TBL_A1	• Set Up Financials/Supply Chain, Business Unit Related, Sourcing, Business Unit Definition • Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Strategic Sourcing Definition	Define PeopleSoft Strategic Sourcing business units.
Purchasing - Business Unit Definition	BUS_UNIT_TBL_PM	• Set Up Financials/Supply Chain, Business Unit Related, Purchasing, Purchasing Definition • Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Purchasing Definition	Define PeopleSoft Purchasing business units. Link PeopleSoft Purchasing business units to PeopleSoft Services Procurement business units.

Page Name	*Definition Name*	*Navigation*	*Usage*
Services Procurement Bus Unit (Services Procurement business unit)	BUS_UNIT_TBL_SP	• Set Up Financials/Supply Chain, Business Unit Related, Services Procurement, Services Procurement Options • Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Defn	Define PeopleSoft Services Procurement business units. Define your own consolidation structures for accounting and reporting purposes.
Work Order Settings	BUS_UNIT_TBL_SP_WO	Select the Work Order Settings tab on the Services Procurement Business Unit page.	Enable surveys and work order approvals, track deliverable resources, determine whether new assignments require sourcing, and set up work order alert notifications.
Reason Code Setup	SPB_REASONCD_BU	Select the Reason Code Setup tab on the Services Procurement Business Unit page.	Establish reason code types for each negative transaction and determine whether the reason code type is required.
eProcurement Business Unit Options	PV_BUS_UNIT_PM	Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, eProcurement Options	Define eProcurement business unit options.
Project Costing Definition	BUS_UNIT_TBL_PC	• Set Up Financials/Supply Chain, Business Unit Related, Project Costing, Project Costing Definition • Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Project Costing Definition	Define PeopleSoft Projects business units.

Page Name	*Definition Name*	*Navigation*	*Usage*
Project Costing Options	BUS_UNIT_OPT_PC	• Set Up Financials/Supply Chain, Business Unit Related, Project Costing, Project Costing Options • Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Project Costing Options	Define PeopleSoft Projects business unit options.

Defining PeopleSoft Strategic Sourcing Business Units

Access the Strategic Sourcing Business Unit Definition page (Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Strategic Sourcing Definition).

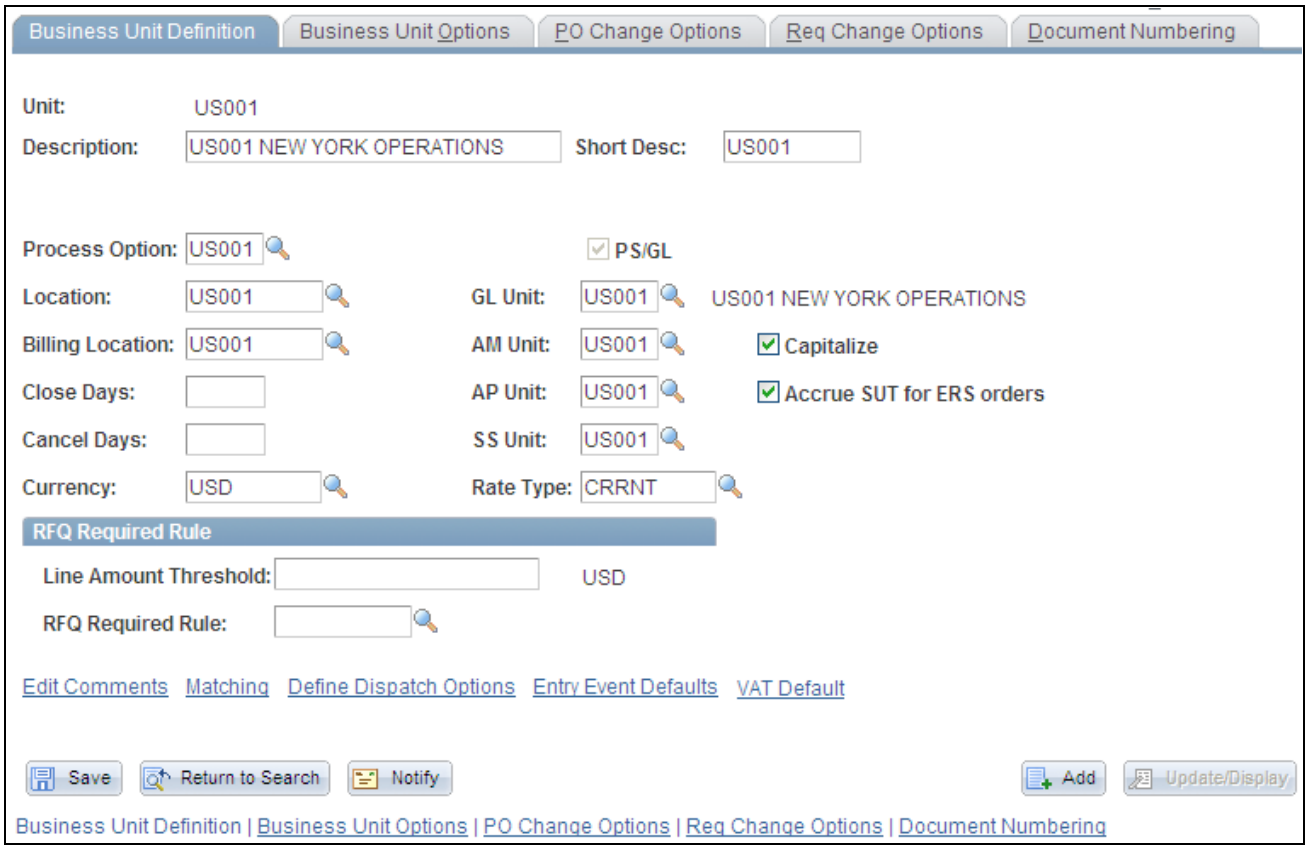
The PeopleSoft Strategic Sourcing business unit definition is required for the PeopleSoft Purchasing business unit if it is used for Services Procurement.

See *PeopleSoft Strategic Sourcing 9.1 PeopleBook*, "Setting Up Business Units in PeopleSoft Strategic Sourcing."

Note. Create setIDs or business units that are at least five characters long. Performance degradation occurs if setIDs or business units have fewer than five characters.

Defining PeopleSoft Purchasing Business Units

Access the Purchasing - Business Unit Definition page (Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Purchasing Definition).



Purchasing - Business Unit Definition page

Note. If you deselect the Asset Management, General Ledger, and Payables check boxes on the Installation Options - Products page, they are no longer required values on the Purchasing Business Unit Definition page. If you have other PeopleSoft applications installed (such as PeopleSoft eProcurement), installation options may differ.

Location

Enter the physical location (address) of the business unit. This location appears as the printed address on dispatched transactions to identify the company's location.

Billing Location

Enter the invoice destination location for this business unit. Available locations are defined on the Location Definition page. This location appears by default on purchasing documents created for the business unit. This location is not necessarily the same as the company address. For example, the billing location might be a post office box, or the payables department might have a different address from the purchasing department.

Currency

Enter the default currency of the business unit.

Rate Type

Enter the rate type to use for currency conversion. The currency code and rate type appear by default on all purchasing documents for this business unit.

SS Unit(strategic sourcing business unit)	Enter the PeopleSoft Strategic Sourcing Business unit. This is to be used by PeopleSoft Services Procurement during the bidding process.

See *PeopleSoft Purchasing 9.1 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options," Establishing PeopleSoft Purchasing Business Units.

Purchasing Business Unit - Business Unit Options page

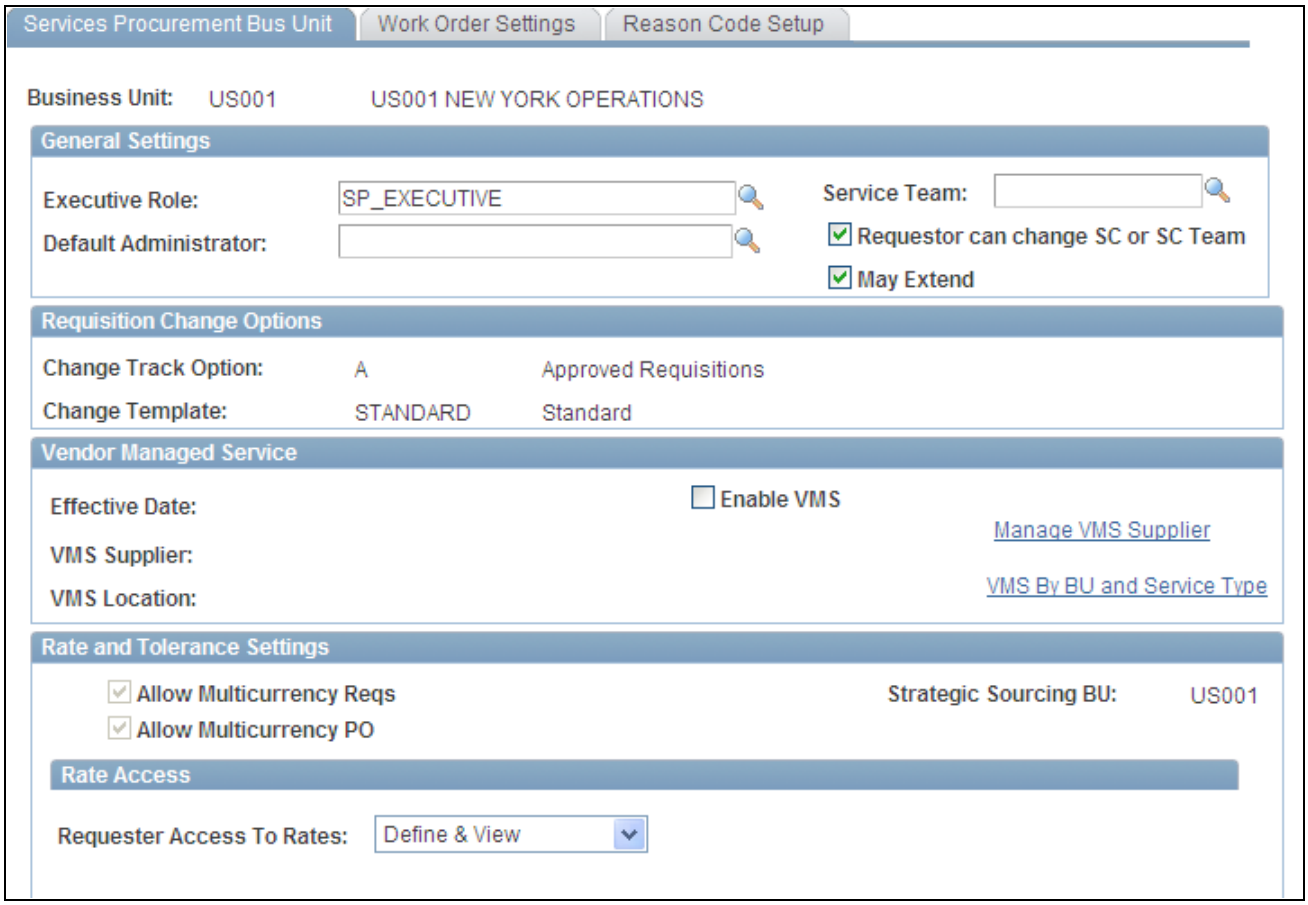
Use the Purchasing Business Unit - Business Unit Options page to define the multicurrency settings for the requisitions and purchase orders. If the PeopleSoft Services Procurement application is installed, use this page to define settings that have a direct impact on the service requisitions and work orders. To access the page, select Set Up Financials/Supply Chain, Business Unit Related, Purchasing.

See Also

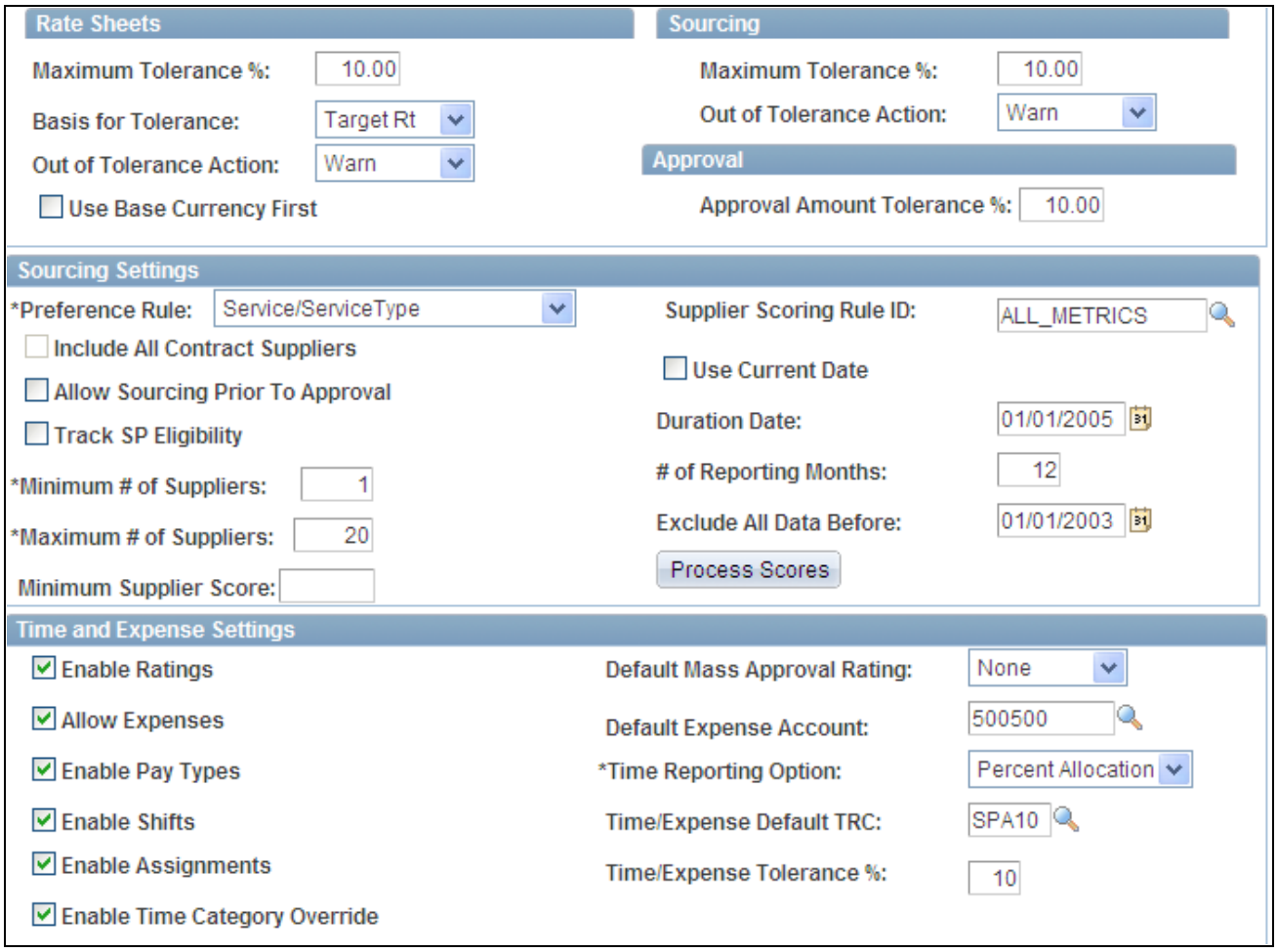
PeopleSoft Purchasing 9.1 PeopleBook, "Defining PeopleSoft Purchasing Business Units and Processing Options," Creating Business Unit Options

Defining PeopleSoft Services Procurement Business Units

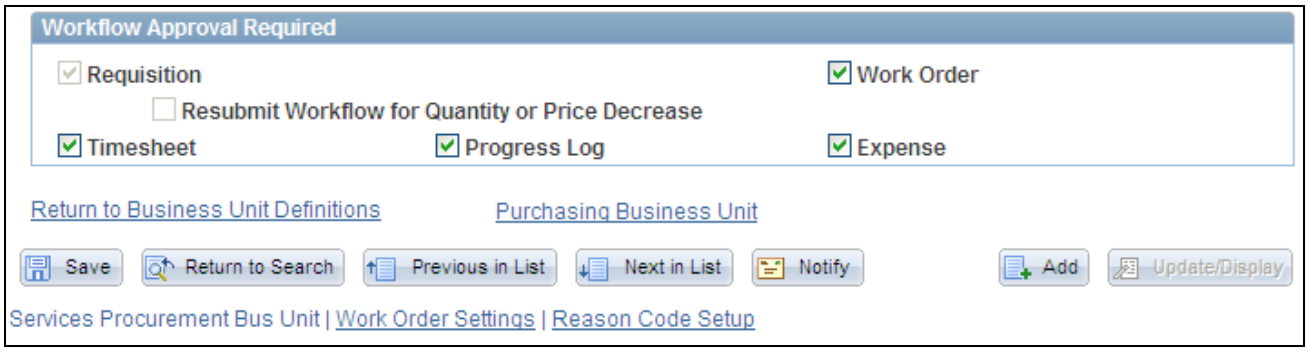
Access the Services Procurement Bus Unit page (Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Defn).



Services Procurement Bus Unit page (1 of 3)



Services Procurement Bus Unit page (2 of 3)



Services Procurement Bus Unit page (3 of 3)

Note. You should set up the PeopleSoft Purchasing business unit before you set up the PeopleSoft Services Procurement business unit.

Click the Purchasing Business Unit link at the bottom of the page to access the PeopleSoft Purchasing business unit setup information for the current business unit.

General Settings

Executive Role Enter the executive role that has full access to all reporting business units for interactive reporting.

Service Team Click to add a default service coordinator team to the PeopleSoft Services Procurement business unit. The system uses this default if the service requester does not have a default team, and the requisition region/service type does not have a team defined. The service team is not required.

Default Administrator Select the user that should receive any administrator notifications for this business unit.

Note. When you create a new requisition, the system checks for a service team or service coordinator. First, the system looks for a default team on the service requester, then it looks for a team by region and service type, and then for a team on the business unit. If a team exists, the system supplies the team ID and description by default. If no team is defined at any of those levels, the default service coordinator for the service requester is used. The user can select another team or individual service coordinator instead of the default if the Requestor can change SC or SC Team check box is selected.

Requester can change SC or SC Team(requester can change service coordinator or service coordinator team) Select to specify whether a requester can override the service coordinator or service coordinator team that is supplied by default onto the requisition.

Note. The requester cannot override the default service coordinator or team for requisitions or work orders that are under VMS (vendor managed services) management, regardless of this setting.

May Extend Select to enable a requester or a service coordinator to extend a requisition or a work order. If this check box is not selected, you cannot extend a requisition or work order. Extending a requisition or work order enables a service to be assigned to a fixed-price requisition or multiple unique service providers that can be sourced to a requisition to fill the required services. When the requisition is filled, the system enables the multiple unique service providers to report time against a single work order. Service providers can enter time against multi-resource work orders and then the reported time triggers consumption against a single top-line, multi-resource work order.

Requisition Change Options

Use this section to set up requisition change tracking for PeopleSoft Services Procurement. You can also track the changes within the system and have the changes go through the appropriate approvals. This requisition audit trail is similar to those used in PeopleSoft Purchasing requisitions. You can set up and capture change order reason codes for PeopleSoft Services Procurement requisitions and purchase order change orders to identify why a change was made. The change tracking audit trail includes changes to header, line, and distribution information in requisitions.

See *PeopleSoft eProcurement 9.1 PeopleBook*, "Determining Functional Implementation Options," Creating a PeopleSoft Purchasing Business Unit.

Change Track Option

Select an option that indicates whether you are going to track changes made to PeopleSoft Services Procurement requisitions and purchase orders and the category of requisition that are eligible for change order tracking.

If the system you are using does not have PeopleSoft eProcurement installed, you can edit the change fields using this page. When eProcurement is installed the change fields are display-only fields. You can edit them using the eProcurement Business Unit page.

Change track options include:

- *A:* Select to start tracking changes after the requisition status is Approved. The system continues to track changes for the requisition after it has been budget checked and as it goes through sourcing.
- *B:* Select to start tracking changes after the requisition has a budget check status of Valid. If PeopleSoft Commitment Control has not been enabled, this option does not appear.
- *N:* Do not track requisition changes.
- *S:* Select to start tracking changes after the requisition status is Sourced.

See *PeopleSoft eProcurement 9.1 PeopleBook*, "Changing Requisitions and Using Change Requests," Changing Requisitions.

Change Template

Select the template that you want to use to track change orders. The template determines the records and fields the system tracks for changes. If the Change Track Option field value is not None, then this field is a required field and the system uses this change template for tracking changes.

The system uses the change template to track PeopleSoft Services Procurement requisitions and to determine whether re-approval of the requisition is necessary after changes, if you are using PeopleSoft Approval Framework for approvals. Fields that are defined in the change template and that have the Reapprove check box selected are automatically resubmitted through PeopleSoft Approval Framework for re-approval.

See *PeopleSoft Purchasing 9.1 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options," Defining Purchase Order Change Options and Approval Requirements.

Vendor Managed Service (VMS)

Effective Date

Displays the effective date for the vendor-managed service.

Enable VMS(enable vendor managed services)	Select this option to determine whether requisitions or work orders for this business unit are under VMS management by default. After you select this option, you must define at least one VMS supplier and VMS fee. **Note.** VMS vendor and markup costs that are defined here apply for the VMS services provided within the business unit that do not have a service type level VMS override defined. If you select this option, the current VMS Supplier and VMS Location fields associated with the VMS provider appear on the page.
VMS Supplier(vendor managed services supplier) and **VMS Location**	Displays the VMS supplier and location that has been defined on the Manage VMS Supplier page.
Manage VMS Supplier (manage vendor managed services supplier)	Click to access the VMS Supplier by Business Unit page, where you can define the effective-dated VMS vendor and vendor location information.
VMS by BU and Service Type (vendor managed service by business unit and service type)	Click to access the VMS by BU and Service Type page, where you can define any override of the business unit's VMS settings for this service type, and view the current VMS suppliers and locations defined for business unit and service type combinations.

Note. The VMS section appears only for a non Managed Services Provider (MSP) implementation. The VMS section is replaced by an MSP section on this page if the MSP installation option is enabled.

Rate and Tolerance Settings

Allow Multicurrency Reqs (allow multicurrency requisitions)	Determines whether the selected business unit allows multiple currency requisitions. If this check box is selected, then the requester's currency automatically appears on the requisition and the user can change it to another currency. To modify this field, access the Purchasing Business Unit Definition page. If the check box is not selected, the system uses the business unit currency as the requisition currency and the you cannot change it.
Allow Multicurrency PO (allow multicurrency purchase orders)	Determines whether the selected business unit allows multicurrency work orders and POs. If this check box is selected, the user can enter expenses in a currency other than the work order currency. To modify this field, access the Purchasing Business Unit Definition page. If the check box is not selected, expenses must be entered in the currency that you establish on the work order.
Strategic Sourcing BU (PeopleSoft Strategic Sourcing business unit)	Displays the PeopleSoft Sourcing business unit.

Note. The system can have multicurrency purchase orders with single currency requisitions or it can have multicurrency requisitions with single currency purchase orders.

Rate Access

Requester Access to Rates

Select a value to define what occurs when requesters view pages that contain rate information: Values are:

Define and View: Requester has access to define and view rates when creating requisitions and manual work orders.

No Access: Requesters do not have access to rates when creating requisitions and manual work orders.

View Only: Requesters have access to view rates only when creating requisitions and manual work orders.

Skip SC Rate Definition When Rate Sheet Present(skip service coordinator rate definition when rate sheet is present)

Select to not route, requisitions and work orders to service coordinators when a rate sheet is present. This check box appears only when you select the *View Only* or the *No Access* value in the Requester Access to Rates field.

If you do not select this option, all requisitions and work orders are routed to the service coordinator for rate definition prior to approval when the requester has no access to define rates.

Rate Sheets

Maximum Tolerance % (maximum tolerance percentage)

Enter the total percentage by which the requisition and work order rates can exceed the rate defined on the rate sheet.

Basis for Tolerance

Select *Range* or *Target Rt* (target rate). The base for tolerance is recognized on the rate sheet. Select *Range* if the tolerance cannot exceed the minimum or maximum range defined on the rate sheet. Select *Target Rate* if the tolerance cannot exceed the target range defined for the rate sheet.

Out of Tolerance Action

Select *Not Allow* or *Warn* as the action that occurs when a requisition is outside the tolerance. The *Not Allow* option prevents the requisition or work order from being saved.

Use Base Currency First

Select to define currency for rate sheet tolerance. If this check box is selected, the system uses the currency and rate type defined on the purchasing business unit rate sheet for the selected region and role. The system then uses the base currency amount defined in the rate sheet for tolerance checking. If the check box is not selected, then the system uses the transaction currency. If a rate sheet does not exist for the transaction currency, then the system uses the base currency to search for a comparable rate sheet.

Sourcing

Maximum Tolerance % (maximum tolerance percentage)

Enter the total percentage by which suppliers can exceed the defined rate on a requisition when submitting bids. For resource-based requisitions, the tolerance check is against the requisition rate. For deliverables-based requisitions, the tolerance check is against the requisition amount.

Out of Tolerance Action

Select *Not Allow* or *Warn* as the action that occurs when a supplier submittal is outside the tolerance. The *Not Allow* value prevents the supplier from submitting the bid if it is out of tolerance.

Approval

Approval Amount Tolerance %(approval amount tolerance percentage)

Enter the total percentage by which the filled requisition can exceed the rate defined on the requisition. The default value is *0*, indicating that no tolerances are used for the business unit.

Sourcing Settings

Preference Rule

Select *Region* or *Service/Service Type* as the preferred sourcing method when you source requisitions to suppliers. For example, if you select *Region* as the preference rule, all suppliers defined for that region appear first on the sourcing selection page. If *Service/Service Type* is the preferred rule, all suppliers defined for the service or service type appear on the sourcing selection page. This is a required field.

Supplier Scoring Rule ID

Enter the scoring rule (group of matrixes) used to score suppliers.

Include All Contract Suppliers

If this check box is enabled, suppliers with contracts are returned in the sourcing selection even if they are not defined for the requisition region or service type. If this check box is disabled, the sourcing selection ignores contract suppliers.

Note. This check box is enabled only if the PO Service Contracts Enabled check box is selected on the Services Procurement Installation Options page.

Use Current Date

Select this box to use the current date rather than a specific date as the starting point for reporting.

Allow Sourcing Prior to Approval

Select to indicate that sourcing is allowed before requisition approval is granted.

Track SP Eligibility(track service provider eligibility)

Click to indicate that you want to control the use of reason codes when the status of a supplier changes. The eligibility feature tracks service providers that have been identified as not eligible for new assignments and provides warnings that these service providers should not be selected to fill new work orders.

The services administrator maintains setup data related to the service provider and maintains the provider's acceptability status in the system. As part of tracking the eligibility of service providers, service coordinators receive services bid submittals from suppliers. They can then initiate work order replacements and determine whether a candidate submitted with similar identifying information as an individual who was previously identified as ineligible is actually the same person.

To support comparing and determining potentially ineligible service providers, the system uses service provider identifiers. These identifiers provide high-level unique information about a service provider. Examples of service provider identifiers include Social Security numbers, driver's licenses, and passport IDs.

Duration Date

Enter the date used to determine the absolute beginning date of the analysis data. The system retrieves data from this date forward. The current system date appears by default. This field appears only when the Use Current Date check box is not selected.

Note. If the values that you enter in the Duration Date and # of Reporting Months (number of reporting months) fields define a date before the entered start date, the system does not retrieve data prior to the entered start date. For example, if the start date is 01/01/2010, the duration date is 06/30/2010, and the number of reporting months is 12 (indicating 12 months of data prior to 06/30/2010), the system retrieves data only for the period between 01/01/2010 and 06/30/2010. The system does not retrieve data prior to 01/01/2010 or, in this example, between 07/01/2009 and 12/31/2009.

Minimum # of Suppliers (minimum number of suppliers) and **Maximum # of Suppliers** (maximum number of suppliers)

Enter the minimum and maximum number of suppliers to be returned from the sourcing rules that should appear on the sourcing selection page.

# of Reporting Months (number of reporting months)

The system uses this date to determine the period to use to retrieve the analysis data. Enter the number of months before or after the duration date for which the system retrieves data.

Enter a positive value in the # of Reporting Months field to indicate the number of months starting from the duration data to be included in the process. Enter a negative number to indicate the number of months before the duration date to include in the process.

Note. The system does not retrieve data prior to the entered start date, regardless of the values entered in the Duration Start Date and # of Reporting Months fields.

Exclude All Data Before The system uses this date to retrieve data

Minimum Supplier Score Enter the minimum score that a supplier must have to bid on a requisition. Suppliers must have this score or higher to meet the requisition requirements and appear on the sourcing selection page. Suppliers below the score do not appear on the sourcing selection page.

Note. You can also define a minimum supplier score at the service type level. If a minimum score is defined, that score takes precedence over the minimum score setting defined at the business unit level.

Process Scores Click to access the Supplier Score page, where you can process scores for the specified scoring rule ID.

Time and Expense Settings

Enable Ratings Select to enable use of performance ratings on time sheets and progress logs. By default, the check box is deselected.

Default Mass Approval Rating Select the rating to be used when you are approving time sheets and progress logs en masse. Values are *Excellent, Fair, Good, Poor,* and *None.*

Note. This field is accessible only if *Enable Ratings* is selected.

Note. If you leave this field blank, the rating of *None* appears by default on all time sheets and progress logs that are mass approved.

Allow Expenses Select to allow the entry of expense amounts on requisitions and work orders. By default, the check box is deselected, meaning that expenses are not allowed.

Note. This check box is enabled only if the SP Expenses Enabled check box is selected on the Services Procurement Installation Options page.

Default Expense Account Select the account to use as the default expense account for submitted expenses.

Enable Pay Types Select to allow suppliers to enter the breakdown of the rate that they are bidding, for example, how much goes to the service provider, how much is vendor markup, and so forth. By default, the check box is deselected, meaning that the supplier enters one rate inclusive of all rate breakdowns.

Note. This check box is enabled only if the SP Pay Types Enabled check box is selected on the Services Procurement Installation Options page.

Note. This check box is also used in conjunction with the SP_HIDE_RATE_BREAKDOWN role action to determine whether the rate breakdown components are specified and displayed on requisitions.

Time Reporting Option

Use this option to determine whether the service provider reports time against specific ChartField distributions, or whether the total time is entered and distribution percentages are used to automatically split time or progress according to the percentage on the ChartField distribution defined for the work order.

This is the highest-level default and you can override it by the setting defined for individual service types. Values are:

- *Actual Allocation:* Select to enable the service provider to report actual time against each ChartField distribution line defined on the work order.

  Note. This option applies to resource-based requisitions and work orders only.

- *Percent Allocation:* Select to enable the service provider or service provider contact to report total time or progress against a work order.

  The distribution percentage is used to automatically allocate time or progress across the predefined ChartField distribution lines.

Enable Shifts

Select to enable the business unit to use shifts on time sheets.

Time/Expense Default TRC (time and expense default time reporting code)

Select a TRC. The system uses this TRC as the default for time calculations when no time reporting rule is associated with the time template.

Note. It is advised that you select a TRC with a multiplication factor of 1.0, because the TRC is used in all invoice calculations for time with no associated time reporting rule. For example, if you select a TRC that has a multiplication factor of 2.0, the invoice amounts using this TRC are equal to the total hours multiplied by the rate on the work order multiplied by 2.0. The system displays a warning message if you use a multiplication factor other than 1.0 as the default.

Enable Assignments

Select to enable the business unit to use assignments when entering time sheets for this business unit.

Time/Expense Tolerance % (time/expense tolerance percentage)

Enter a tolerance percentage that the system can use to determine whether the time and expense is within an acceptable range.

Enable Time Category Override

Select this option if time reported can be overridden.

Workflow Options

Use this section to define PeopleSoft Approval Framework options for PeopleSoft Services Procurement processes.

Requisition	Select to use the approval framework for approving requisitions. When PeopleSoft eProcurement is installed, this check box setting is determined by the eProcurement setting. When eProcurement is not installed, you can change this check box value and the Resubmit Workflow When Quantity or Price Decreases check box value.
Resubmit Workflow When Quantity or Price Decreases	Select to use the approval framework to approve requisitions again when there is a decrease in the quantity or price on the requisition. This check box is available only when PeopleSoft eProcurement is not installed and the Requisition approval check box is selected. The change template is used for tracking sPro requisitions as well as to reapprove requisitions if workflow approval is required. If any field in the change template is marked for re-approval and changed in the pending/approved requisition, then the requisition is resubmitted to PeopleSoft Approval Framework.
Work Order	Select to indicate that the work order requires submission to and approval by the work order approver. The work order approval process is used for work orders that are related to the specified business unit.
Timesheet	Select to indicate that you want to require that the approval framework is used for time sheet approvals.
Progress Log	Select to indicate that you want to require that the approval framework is used for progress log approvals.
Expense	Select to indicate that you want to require that the approval framework is used for expense approvals.

See Also

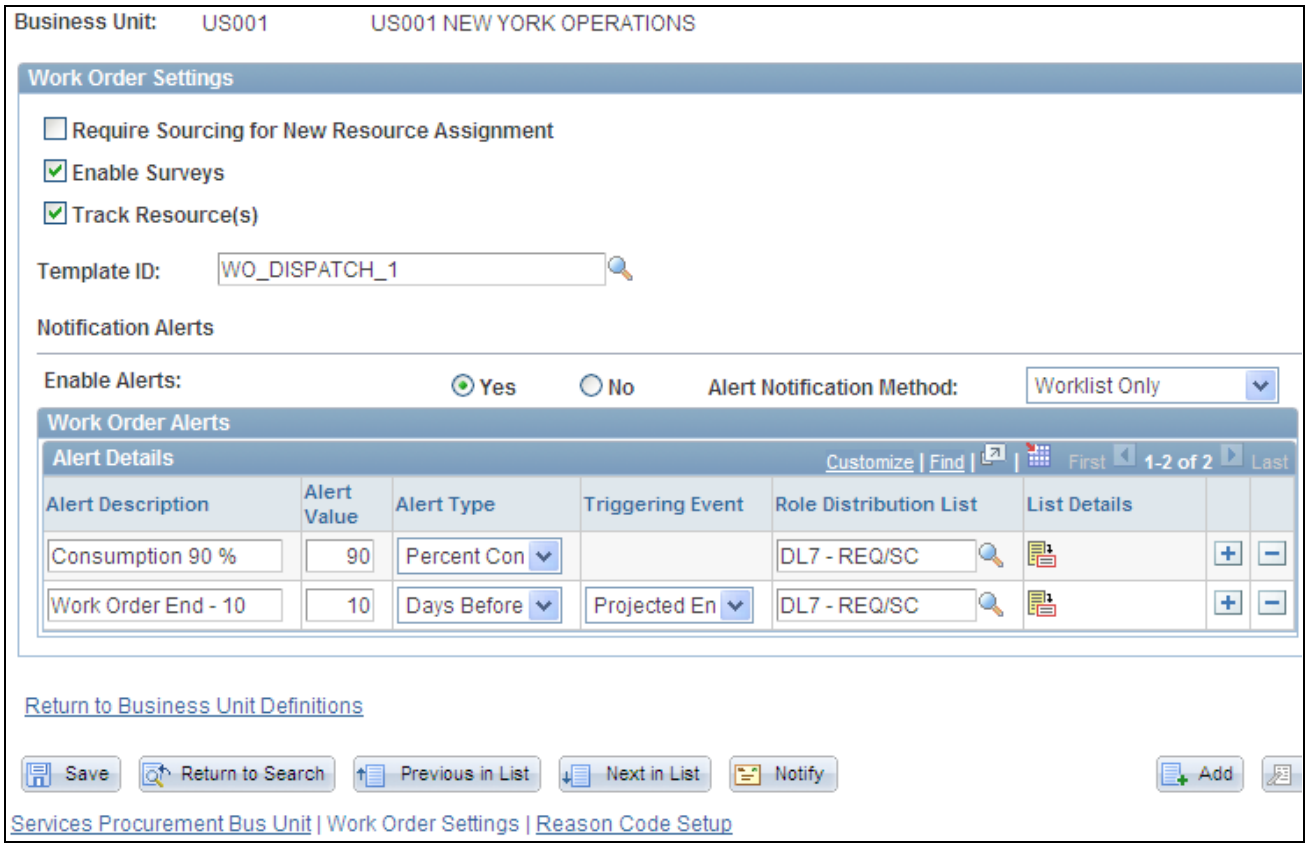
Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Using Shifts on Timesheets, page 180

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Defining Assignments for Use on Timesheets, page 187

Chapter 19, "Managing Time in PeopleSoft Services Procurement," Editing Time Categories on Timesheets, page 507

Defining Work Order Settings

Access the Work Order Settings page (select the Work Order Settings tab on the Services Procurement Business Unit page).



Work Order Settings page

The system administrator can set up role distribution lists so that one or more users can be notified when the work order reaches a particular threshold.

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Role Distribution Lists, page 87.

Note. This alert runs in the background as a scheduled process. To activate the process, select PeopleTools, Process Scheduler, Processes and select *SP_WO_ALERT* as the process name.

Work Order Settings

Require Sourcing New Resource Assignment

Select to indicate that service coordinators must use the sourcing process when choosing a work order replacement for this business unit

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Note. If you do not select this option, service coordinators can bypass the sourcing process when choosing a work order replacement.

Enable Surveys

Select to indicate that surveys can be used for work orders that are related to the specified business unit.

Track Resources(s) Select to enable tracking of individuals who provide services on deliverable-based work orders for this business unit.

Template ID Enter the template type that you want to use to print the Purchase Order Dispatch report. The template controls the report layout used by BI Publisher to generate reports. The template provides a common framework across PeopleSoft Purchasing, eProcurement, and Services Procurement for purchase order dispatches. The purchase order dispatch incorporates BI Publisher to segregate the data from the layout. Templates enable you to easily format purchase order layouts and better meet specific requirements for the Purchase Order report.

Enable Alerts Select to indicate whether to use alerts for the work order. Values are *Yes* and *No*.

Alert Notification Method When the Enable AlertsYes button is selected, the alert notification must be sent using a worklist only or email and worklist. The Work Order grid also appears when the button is selected.

Work Order Alerts

The system provides alert notification values by default from the business unit onto the work order if alert notification values are not found on the requester default, service coordinator default, or service type. Notifications are used to notify users when work orders reach a certain threshold event or consumption amount. This acts as a warning that some action must be taken, such as extending the work order if the project does not appear to be finishing on time.

Alert Description When the Enable Alerts option is set to *Yes*, enter a brief description for the work order alert notification.

Alert Value Enter a value to determine when the work order event triggers.

Note. This value is represented in days and percent.

For example, you might create a work order alert for Consumption 80%, with the alert value set to *80*. When the system reaches an 80% consumption rate, the work order event triggers. As well, you might create a work order alert for Work Order End - 10, with the alert value set to *10*, to indicate that the work order will trigger 10 days before the work order is scheduled to end.

Alert Type

Select the type of alert that the system uses to trigger the work order notification. Values are:

- *Days Before:* Indicates the number of days before a specific event that the notification triggers.
- *Days After:* Indicates the number of days after a specific event that the notification triggers.
- *Percent Consumption:* Indicates a percent that must be reached for a work order event notification to trigger.

Note. The Alert Type and Alert Value fields work in combination together.

Triggering Event

Select to indicate the type of work order event that will trigger this alert notification when the alert type is set to either *Days After* or *Days Before.* Values are:

- *Actual End Date*
- *Actual Start Date*
- *Approval Date*
- *Cancel Date*
- *Closed Date*
- *Entered Date*
- *Projected End Date*
- *Projected Start Date*
- *Released Date*
- *Terminated Date*
- *Work Order End Date*

If the alert type is *Days After*, all of these values except for *Work Order End Date* are available.

If the alert type is *Days Before*, then only the *Projected End Date,Projected Start Date*, and *Work Order End Date* fields are available.

Role Distribution List

Select the list of users who will receive the work order notification.

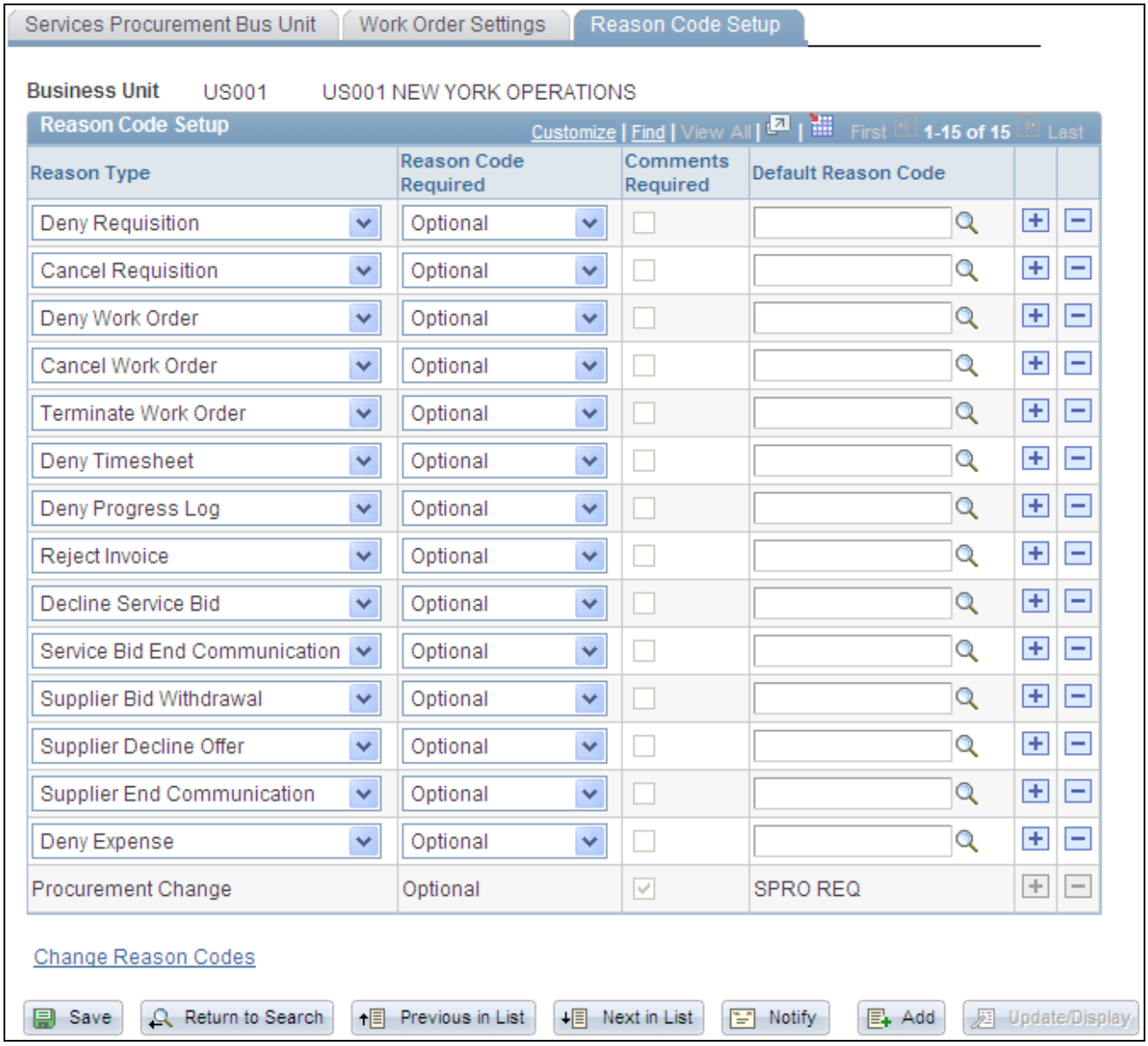
Click the List Details button to view the list of roles that are included on the selected distribution list.

Click to add a new default alert for the service type.

Click to delete a new default alert for the service type.

Setting Up Reason Codes

Access the Reason Code Setup page (Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Defn. Select the Reason Code Setup tab on the Services Procurement Business Unit page).



Reason Code Setup page

You use this page to define the use of reason codes at the business unit level. This includes making the code required when you use the associated reason type and requiring comments when a negative transaction occurs. To create reason codes, you use the Reason Code page.

See Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining Services Reason Codes, page 68.

You use reason codes to track why requesters, service coordinators, approvers, and service provider contacts perform certain actions. These actions might include denying a time sheet or withdrawing a bid. You can also, for example, decline, reject, end, terminate, and cancel transactions. You cannot have duplicate entries for a reason type.

Along with defining services reason codes, you can assign a default change reason code for requisition changes. To define a default code, click the Change Reason Code link at the bottom of the page to access the Purchasing Options page. Using this page you can click the Change Reason Code link on that page to access the PeopleSoft Purchasing Procurement Change Reason Codes page. You can then select a default change reason code for use with PeopleSoft Services Procurement. The change reason code is to the Procurement Change reason type.

Reason Type

Select a PeopleSoft Services Procurement reason type. Reason types correspond to actions and reason codes are the reasons given for the action. You can add a reason code that provides more specific reasons for performing an action. Services Procurement provides reason types and codes, but you can add more to meet business requirements.

As an example, for using the Eligibility Status reason type, you can establish several reason codes that describe the possible reasons why a service provider would be ineligible for an assignment. An example might be a reason code for poor performance or a personnel issue. Then, when the service provider is not used, the service coordinator can select which reason code best describes why the provider is not eligible.

System-supplied reason types include:

- *Cancel Requisition:* Used as a reason to cancel a services requisition.
- *Cancel Work Order:* Used to cancel a service work order.
- *Decline Service Bid:* Used to decline a services bid submission.
- *Deny Expense:* Used to deny an expense.
- *Deny Progress Log:* Used to deny the approval of a progress log.
- *Deny Requisition:* Used to deny the approval of a requisition.
- *Deny Timesheet:* Used to deny a timesheet.
- *Deny Work Order:* Used to deny the approval of a work order.
- *Eligibility Status:* Used as a reason when a service provider is not eligible to fill a work order.
- *Reject Invoice:* Used to reject an invoice.
- *Service Bid End Communication:* Used as a reason when the bid process between the service coordinator and the supplier officially ends.
- *Supplier Bid Withdrawal:* Used as a reason when a supplier withdraws a bid.
- *Supplier Decline Offer:* Used when the supplier has declined an offer.
- *Supplier End Communication:* Used when the supplier ends communication related to a bid.
- *Terminate Work Order:* Used to terminate a work order.
- *Procurement Change:* Used for change tracking on requisitions. This value is display only, it appears when a value has been defined on the Procurement Change Reason Codes page. It is not editable from the Services Procurement Reason Code Setup page

Reason Code Required

Select to indicate whether reason codes are *Mandatory,Not Used,* or *Optional* for the related reason type.

Comments Required

Select if reason comments are required for this reason type.

Note. Comments can be required only if the Reason Code Required field is set to *Mandatory*.

Default Reason Code

Select the reason code that you want the system to automatically apply when you are performing the task for the corresponding reason type. You can override the code if needed.

Change Reason Code

Click to access procurement options for PeopleSoft Purchasing. When the system uses reason codes from the Purchasing business unit, you can use the Procurement Change Reason Codes page to update reason code settings for changes in PeopleSoft Services Procurement. These settings enable you to define default reason codes for reason types. You can also define whether reason codes or comments should be required when changing a requisition.

You can use reason codes for reason type *Procurement Change*. This reason type enables you to select the default reason code for users entering a change request.

Defining PeopleSoft eProcurement Business Unit Options

Access the eProcurement Business Unit Options page (Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, eProcurement Options).

The business unit enables you to determine whether to use workflow approvals.

Workflow Approval Required

Select to enable the workflow for the PeopleSoft eProcurement business unit.

Note. The setting that you define here is used for Services Procurement requisitions as well.

Resubmit Workflow for Quantity or Price Decrease

Select to indicate that you want to resubmit a requisition for approval when the quantity or price has decreased. This check box is available when you select to enable workflow approval for the business unit.

Note. It is recommended that you create setIDs or business units that are at least five characters long. Performance degradation occurs if setIDs or business units have fewer than five characters.

Setting Up PeopleSoft Project Costing Definitions

Access the Project Costing Definition page (Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Project Costing Definition).

The business unit enables you to plan the projects based on the way that you work instead of the way that you do the financial posting and reporting.

Note. This page is available only if Project Costing is enabled on the Installation Options - Products page.

See Also

PeopleSoft Application Fundamentals 9.1 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Defining Services Procurement Installation Options

Setting Up PeopleSoft Project Costing Options

Access the Project Costing Options page.

The business unit enables you to plan the projects based on the way that you work instead of the way that you do the financial posting and reporting.

Note. This page is available only if Project Costing is enabled on the Installation Options - Products page.

Note. Create setIDs or business units that are at least five characters long. Performance degradation occurs if setIDs or business units have fewer than five characters.

Defining System-Wide Definitions

To define reason codes, use the Reason Code (SPB_REASON_CD) component. To define region codes, use the Region Codes (SPB_REGION_CD) component.

To set up locations by region, use the Locations by Region (SPB_REGIONLOCATION) component.

This section provides an overview of reason codes and discusses how to:

- Define automatic numbering.
- Define region codes.
- Set up file attachment servers.
- Build Verity search indexes.
- Define services reason codes.

Use general options to set up the basic table structure. You can access all of the tables discussed in this section from most PeopleSoft applications.

See Also

PeopleSoft Application Fundamentals 9.1 PeopleBook, "Defining and Using ChartFields," Defining Account Types

PeopleSoft Application Fundamentals 9.1 PeopleBook, "Defining and Using ChartFields," Adding Department Values

PeopleSoft Application Fundamentals 9.1 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Setting Up Locations

PeopleSoft Application Fundamentals 9.1 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Establishing Regions and Region Codes

PeopleSoft Application Fundamentals 9.1 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Defining Additional Common Information

Understanding Reason Codes

PeopleSoft Services Procurement supports reason codes for certain actions. Supported actions include, but are not limited to, transactions that are denied, withdrawn, declined, rejected, ended, terminated, or canceled. Reason codes are used to track the reason that requesters, service coordinators, approvers, and service provider contacts perform certain actions. Reason codes are defined by reason type. Reason types correspond to actions and reason codes are the reasons given for the action. You can add a reason code that provides more specific reasons for performing an action. PeopleSoft Services Procurement provides reason types and codes, but you can add more to meet business requirements.

Use of the reason codes is determined at the business unit level. By default, reason codes are not enforced or required. The system administrators can select the reason code tab on the Business Unit page to enable the use of reason codes for specific reason types. Reason codes can be mandatory, optional, or not used.

Note. You create the appropriate reason codes to use throughout the fulfillment process for each reason type.

When a user denies a transaction for a business unit that uses reason codes, the appropriate reason code confirmation page automatically appears so that you can enter the reason that the transaction was denied. Comments entered for the reason code are supplied by default, but you can change the values.

If the reason code and comments are mandatory for a business unit, all actions associated with that reason type within the business unit require a reason code and comments.

Pages Used to Define System-Wide Definitions

Page Name	*Definition Name*	*Navigation*	*Usage*
Account Types	ACCT_TYPE	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Account Types • Set Up Financials/Supply Chain, Common Definitions, Design ChartFields, Define Values, Account Types	Maintain account types such as asset, liability, or expense.
Assign Catalogs to Business Unit	PV_REQ_BU_CAT	Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Assign Catalog to Bus Unit	Assign catalog values for a business unit. The catalog that you choose determines the categories that are available when creating service types.
Auto Numbering	AUTO_NUM_PNL	• Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Auto Numbering • Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Auto Numbering	Define automatic numbering specifications for PeopleSoft fields, such as a unique prefix for regular customers or for customers who are also vendors. The system automatically increments numbers by one.
Calender Builder	CALENDAR_BUILDER	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Calendar Builder • Set Up Financials/Supply Chain, Common Definitions, Calendars/Schedules, Calendar Builder	Define and reference a calendar as the base for other calendars.

Page Name	*Definition Name*	*Navigation*	*Usage*
Currency Code	CURRENCY_CD_TABLE	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Currency Code • Set Up Financials/Supply Chain, Common Definitions, Currency, Currency Code	Define currency. **Note.** To meet the needs of your multicurrency business, Oracle supports the euro and delivers the Currency Code table with many common currencies identified according to ISO standards.
Department	DEPARTMENT	Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Department	Manage department numbers and department names.
Detail Calendar	DETAIL_CALENDAR1	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Detail Calendar • Set Up Financials/Supply Chain, Common Definitions, Calendars/Schedules, Detail Calendar	Define begin and end dates and the number of accounting periods in the fiscal year calendar.
Administer File Attachments	SAC_ATT_ADMIN	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, File Attachment Server • Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments	Add new file attachment servers, and change the currently active server.

Page Name	*Definition Name*	*Navigation*	*Usage*
Location Definition	LOCATION_TBL	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Location • Set Up Financials/Supply Chain, Common Definitions, Location, Location	Define a location code, such as a branch office or shipping office.
Location Detail	LOCATION_TBL2	Select the Locations Details tab on the Location Definition page.	Add details to a location definition.
Define Data Object Set	SAC_IDX_DO_SET	Services Procurement, Define Services Procurement, System-Wide Definitions, Search Indexes, Define Data Object Set	Define data object sets by identifying groups of related records to use for a search index. Data object sets are sets of data objects that are related to each other with level and parent/child information. See "Configuring Search and Building Search Indexes," *PeopleTools PeopleBook: PeopleSoft System and Server Administration*
Source Data Object	EOEW_SRCDO	Click the Define Data Objects link on the Define Data Object Set page.	Define data objects. A data object is an Enterprise Common Component object that defines records relationship and is the basis for setting up Verity searches.
Define Search Index	SAC_IDX_DEFINE	Services Procurement, Define Services Procurement, System-Wide Definitions, Search Indexes, Define Search Index	Locate predefined search indexes. Also, to define a new search index and a specific data object set for use with the index. You can define specific fields that the system will store in the search index. This search retrieves and processes data from a group of records that have multilevel parent and child relationships.

Page Name	*Definition Name*	*Navigation*	*Usage*
Build Search Index	SAC_IDX_RUN_CTRL	Services Procurement, Define Services Procurement, System-Wide Definitions, Search Indexes, Build Search Index	Build service provider search indexes.
Search Test Page	SAC_IDX_TEST_SEC	Click the Test Index link on the Build Search Index page.	Test the index before running it. The system checks for the text that you enter and displays the results about where the text is used and when the element in which it is used has been updated. The display is sequenced and in text format.
Define Search Query	SAC_SRCH_QRY	Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Define Search Query	Group search fields, field labels, and application classes into a search index that you can use to perform Verity searches for service providers. Search queries can include the system-supplied search index SP_PROVIDER_SRCH.
Define Search Results	SAC_SRCH_RSLT	Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Define Search Result	Group search fields, field labels, and application classes into a search index that you can use to perform Verity searches for service providers. Search results can include the SP_PROVIDER_RSLT system-supplied search result.
Define Search Options	SAC_SRCH_OPTIONS	Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Define Search Options	Activate option codes for searches. For example, these codes include codes that indicate the system should match the case or match the word exactly when searching.

Page Name	Definition Name	Navigation	Usage
Maintain Verity Thesaurus	SAC_SRCH_THESAURUS	Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Maintain Thesaurus	Build a thesaurus for Verity searches, which makes it possible to search for a word that is similar to the search word you use. You build the list starting with a search word and enter the similar or related words. When the system searches on the word, it also includes the synonyms that you define in the search results.
Reason Code	SPB_REASON_CD	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Service Reason Code • Set Up Financials/Supply Chain, Product Related, Services Procurement, Reason Codes	Define reason codes related to each reason type.
Region Codes	REGION_CD	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Service Region Code • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Regions/Ratesheets, Service Region Code	Define Services Procurement region codes.
Region Codes Address	REGION_CD_ADDR	Select the Region Codes Address tab on the Region Codes page.	Enter service region code address information.

Page Name	*Definition Name*	*Navigation*	*Usage*
Service Region Structure	PSTREEMGR or SPB_REGIONLOCATION	Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Service Region Structure	Maintain region structures using region tree or location by region. **Note.** The Region Tree Structure check box on the Services Procurement Installation Options page determines which method is used. **Note.** The navigation for this page changes depending on your setting for the Use Region Tree Structure check box defined on the Services Procurement Installation Options page. When you select the Use Region Tree Structure option on the Services Procurement Installation Options page, the system accesses the Tree Manager page, where you can maintain the region structure. If you do not select the Use Region Tree Structure option, the system navigates you to the Location by Region page, where you can specify locations that are included in each region.
Ship to Location Definition	SHIPTO_HDR	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Ship To Location • Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Ship to Locations	Define a ship to location code. This location is used on the service requisition as the place where the services are to be performed.

Page Name	Definition Name	Navigation	Usage
Tree Manager	PSTREEMGR	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Tree Manager • Tree Manager, Tree Manager	View and modify trees needed for service regions and purchase items.
Units of Measure	UNITS_OF_MEASURE	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Units of Measure • Set Up Financials/Supply Chain, Common Definitions, Units of Measure, Units of Measure	Establish units of measure for your resources.

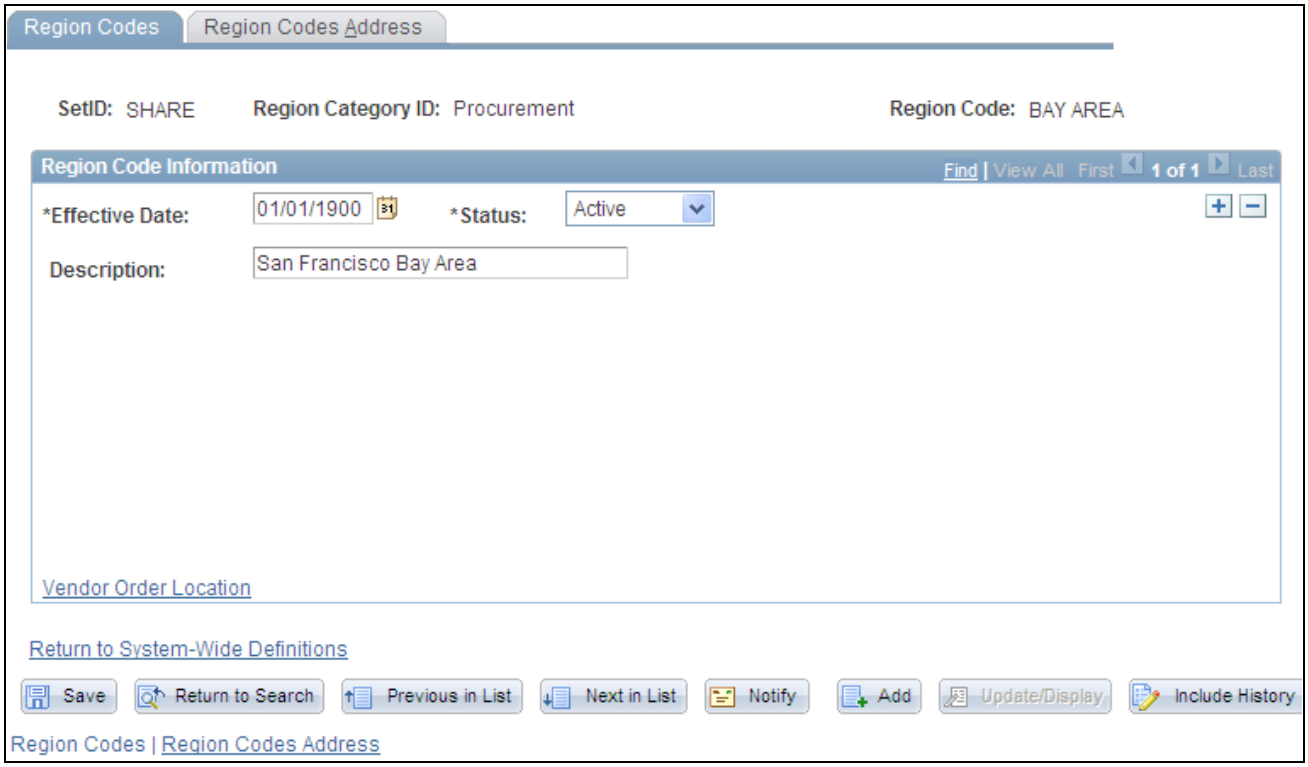
Defining Automatic Numbering

These Services Procurement fields use automatic numbering:

Field Name	Field Value	Description	Short Description
NUM_TYPE	*SPID*	Person ID	Person ID
NUM_TYPE	*SPIN*	Service Procurement Invoice	Srvc Inv
NUM_TYPE	*SPRQ*	Service Requisition	Srvc Req
NUM_TYPE	*SPWO*	Work Order Code	Work Order
NUM_TYPE	*SPAT*	Timesheet	Timesheet
NUM_TYPE	*SPPL*	Progress Logs	Progress Logs

Defining Region Codes

Access the Region Codes page (Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Service Region Codes).



Region Codes page

After you enter information on the Region Codes page, you can select the Region Codes Address tab to enter related information on the Region Codes Address page.

Only regions with a category of procurement are used in PeopleSoft Services Procurement. Regions added from the link on the Define Services Procurement page are automatically created with a category of procurement.

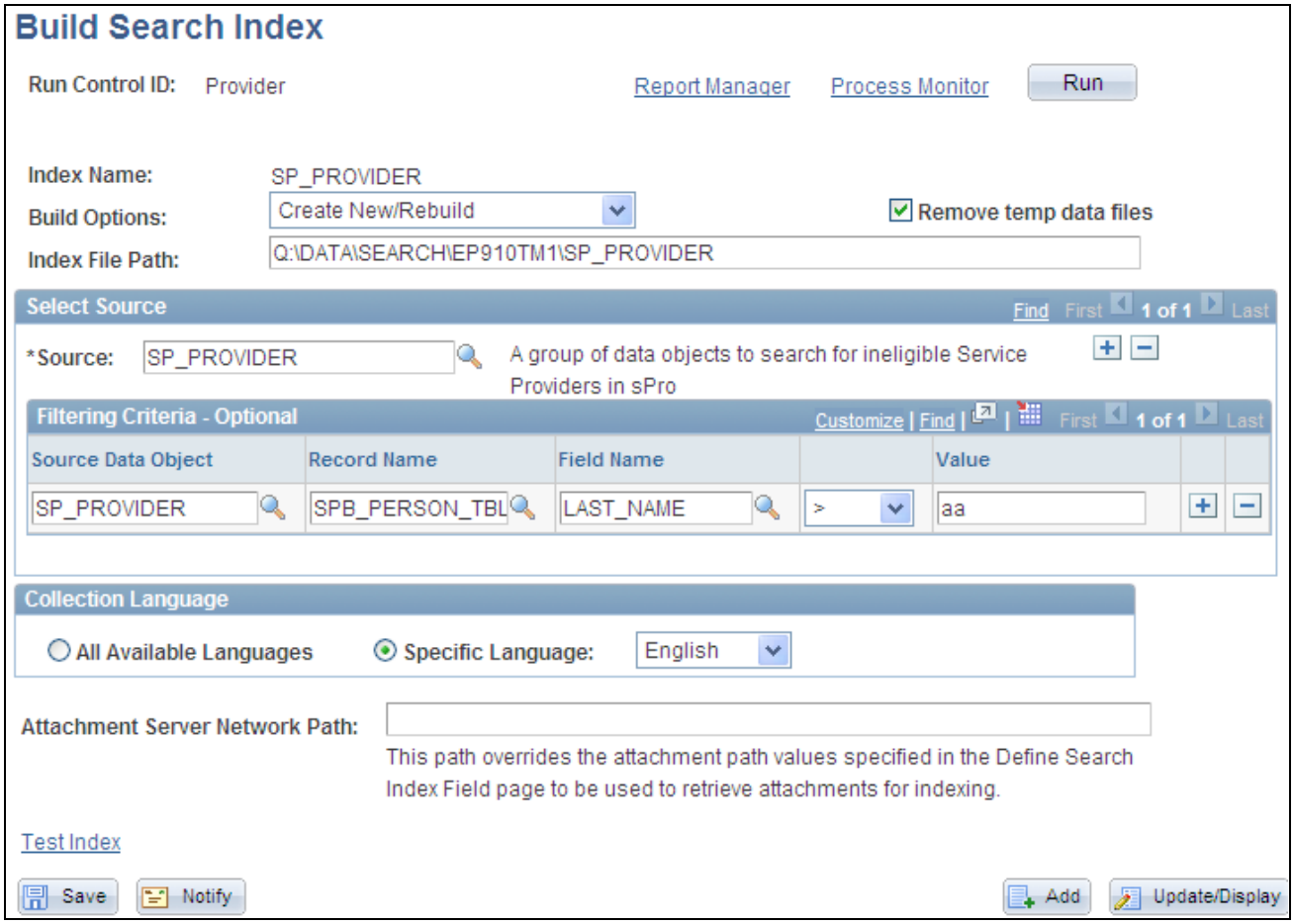
Setting Up File Attachment Servers

Access the Administer File Attachments page (Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, File Attachment Server).

1. Click the Add FTP Server button.
2. Enter the login name, password, server name for *AUC_ATTACH*, and path name.
3. Repeat steps 1 and 2, and create a server named AUC_TEMP.

Building Verity Search Indexes

Access the Build Search Index page (Services Procurement, Define Services Procurement, System-Wide Definitions, Search Indexes, Build Search Index).



Build Search Index page

Use this page to create and update the Verity search indexes and collections to enable service provider searches. The system initializes the page with values based on the index name that you select. Verity searching assists in advanced, text-based searches. You enable search content by creating or updating file-based search collections. The system creates these collections by extracting current information and key values from the PeopleSoft database using predefine application engine jobs.

The Verity search index process extracts information from the PeopleSoft Services Procurement database and loads it into Verity formatted files on a process scheduler server. The Verity indexing application transforms those record files into flat files in an index that the system uses for searching. Values indexed in Verity fields are returned back to PeopleSoft Services Procurement using a PeopleSoft PeopleTools search application program interface. The returned values are based on the search attributes that you enter for the search.

PeopleSoft delivers predefined system data for setting up Verity searches for ineligible service providers. To create the initial search indexes, create the run control for SP_PROVIDER and submit it for processing.

Run Control ID

Displays the run control ID for either building or updating search indexes. You initially define the value for this field.

Index Name

Displays the search index that you will build or update. You initially build the index. Then, you can perform net-change updates to the index.

Build Options

Select a build option. Build options are the methods that you use to create and update a search index. Options include:

Create New/Rebuild: Select to create the initial search index. You must run this option for the service provider search index before you can refresh the index file. After creating the initial file, you can then maintain the file using the *Update Last Modified* option.

When you create the initial file, the system gathers the fields that are defined for the search index, creates a flat file from the fields, and stores the file on the server that is defined in the Index File Path field.

Update: Select to build a search index based on additional structured query language selection criteria.

Note. You do not need to use this option to create or update predefined searches.

Update Last Modified: Select to update a Verity search index based on the last modified records from various records. This option is mainly for incremental-search index updates. Each time that you build or update the index, the system stores the last modified date and time stamp.

When you select this option, the system only selects the elements and their contents that have the last modified date and time stamp that is greater than the index's last modified date and time stamp. The system updates the search index file accordingly.

Remove temp data files

Select this check box to remove temporary data files that the system stores when it builds a Verity collection. The system creates temporary data files (.bif and .dat) from extracted database information to be included in the index. These files can be large. You might want to remove them unless you are reviewing them after builds for debugging purposes.

Index File Path

Displays where the Verity index flat file is located. When you build or update searches, the system updates files at this location.

Source

Displays the source data set from which you will build or update this search index.

Test Index

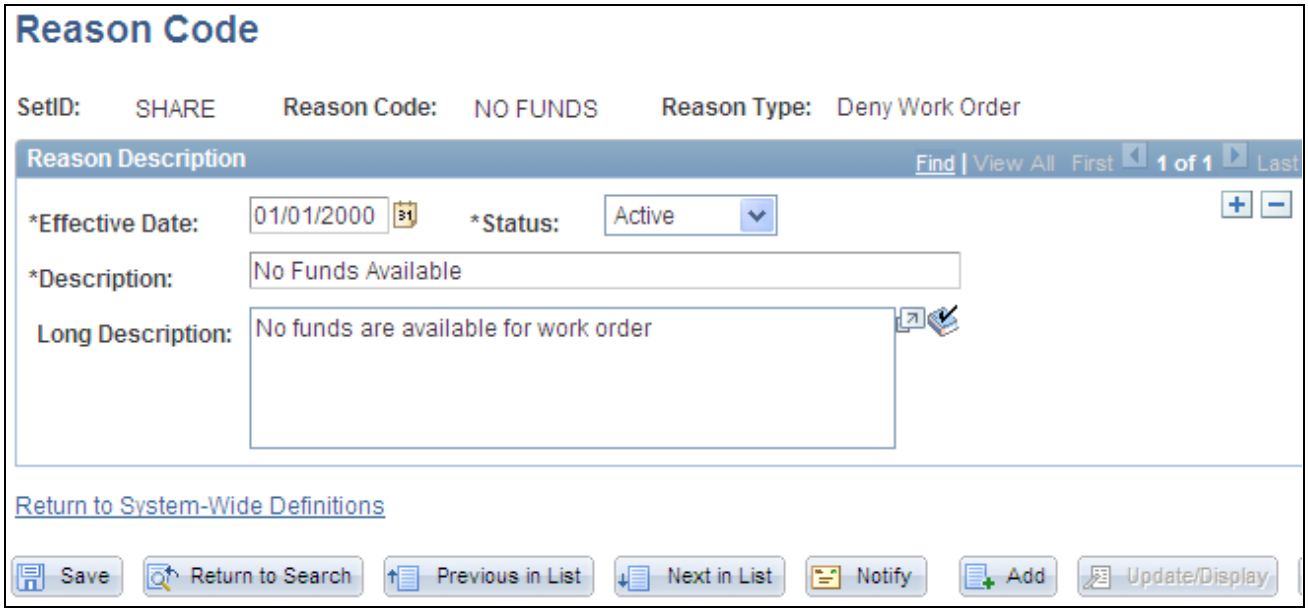
Displays the search index that you will build or update. When you access the page, you can enter a text string on which to search. The system checks for the text and displays the information about where the text is used and when the element in which it is used was updated. The system displays the information in sequence and in text format.

Attachment Server Network Path Enter a value to override the attachment path values specified on the Define Search Index Field page that the system will use to retrieve attachments for indexing.

See "Configuring Search and Building Search Indexes," *PeopleTools PeopleBook: PeopleSoft System and Server Administration*

Defining Services Reason Codes

Access the Reason Code page (Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Service Reason Code).



Reason Code page

Reason Codes - Requisitions

Reason codes are available on requisitions when the following actions are performed:

- Requisition Approvals: The requisition approver denies requisition or requisition lines. A confirmation page appears and the approver can enter a reason code and related comments.
- Cancel Requisition Header or Lines Confirmation: The requester cancels a requisition header or line. A confirmation page appears and the user can enter a reason code and comments to support their reasons for canceling the requisition.

Note. If a requester cancels the requisition header, the reason code and comments are copied to all canceled lines. If a requester cancels individual lines and the last line is canceled, the system prompts the requester to cancel the header as well. If the requester cancels the header, the reason code for the header is supplied by default from the last line, and you can change it to a different reason code.

If encumbrances are enabled (in a commitment-controlled environment), the canceled line amounts are deducted from the encumbrance amount.

- Requisition Changes: Changes made to a requisition after approval, budget checking, or sourcing may require the assignment of a reason code, based on the related template and business unit definition set up.

To maintain reason codes for a requisition change, retrieve the tracking change reason code setup from the PeopleSoft Purchasing processing option and show it as a display-only grid. Change templates are used to determine whether changes are tracked, require re-approval, and are used to update purchase orders. Records available for tracking depend upon the installed products.

Reason Codes - Sourcing

Reason codes are available for sourcing when the Service Coordinator cancels a requisition header or line. A confirmation page appears, and the service coordinator can enter the reason code and related comments.

Reason Codes - Bidding

Reason codes are available for bidding when the following actions are performed:

- Bid Response: The service coordinator or requester declines a bid or ends communications.

  A confirmation page appears, and the service coordinator or requester can enter a reason code and related comments.

- Incoming Bid: The service coordinator or requester ends communications.

  A confirmation page appears, and the service coordinator or requester can enter a reason code and related comments

- Supplier Bid Response and Incoming Bid: A service provider contact withdraws a bid, declines an offer, or ends communication.

  A confirmation page appears, and the service provider contact can enter a reason code and related comments.

Reason Codes - Work Orders

Reason codes are available for work orders when the following actions are performed:

- Work Order Approval: The work order approver denies a work order.

  A confirmation page appears, and the work order approver can enter a reason code and related comments.

- Work Order Details: The requester or service coordinator cancels or terminates a work order.

  A confirmation page appears, and the requester and service coordinator can enter a reason code and related comments.

Reason Codes - Timesheets

Reason codes are available for time sheets when the following actions are performed:

- Time/Expense Summary: Time sheet approvers deny a time sheet.

  A confirmation page appears, and the approver can enter a reason code and related comments.

- Project Time Details: Time sheet approvers deny a time sheet line.

  A confirmation page appears, and the approver can enter a reason code and related comments.

Reason Codes - Progress Logs

Reason codes are available for progress logs when the progress log approvers deny a progress log. A confirmation page appears, and the approver can enter a reason code and related comments.

Reason Codes - Invoices

Reason codes are available for invoices when the following actions are performed:

- Manage Invoice Approval: A supplier invoice approver rejects an invoice header.

  A confirmation page appears, and the supplier invoice approver can enter a reason code and related comments.

- Invoice Approval - Line Summary: The supplier invoice approver rejects an invoice.

  A confirmation page appears, and the supplier invoice approver can enter a reason code and related comments.

- Manage Invoice Approval: An enterprise invoice approver rejects an invoice header.

  A confirmation page appears, and the enterprise invoice approver can enter a reason code and related comments.

- Manage Invoice Approval - Line Summary: An enterprise invoice approver rejects an invoice line.

  A confirmation page appears, and the enterprise invoice approver can enter a reason code and related comments.

Defining Project and Activities Definitions

To set up activities by service, use the Activities by Service (SPB_SRC_ACT) component or the Activities by Service (SP_ACT_BY_SVTYP) component. To define project activities, use the Project Activities (SPA_PROJ_ACT) component. To define project roles associated with activities, use the Service/Project Role (SPB_PROJ_ROLE) component.

To maintain project information, use the Maintain Service Projects (SPA_PROJECT) component. To set up project types, use the Project Types (SPA_PROJ_TYPE_DEFN) component. To set up service activities, use the Service Activities (SPB_ACTIVITY_TBL) component.

This section discusses how to:

- Define project types.
- Maintain service projects.
- Define project activities.
- Set up service activities.

- Set up activities by service.
- Set up activities by service type.

Pages Used to Define Project and Activities Definitions

Page Name	*Definition Name*	*Navigation*	*Usage*
Project Types	SPA_PROJ_TYPE_DEFN	• Services Procurement, Define Services Procurement, General Setup, Project/Activities Definitions, Project Types • Set Up Financials/Supply Chain, Product Related, Services Procurement, Projects, Project Types	Maintain project types.
Manage Services Projects	SPA_MANAGE_PROJ	Services Procurement, Define Services Procurement, General Setup, Project/Activities Definitions, Service Projects	Manage services projects from a central location.
Maintain Services Projects	SPA_PROJECT	Click the Add button or click the link for an existing project from the Manage Service Projects page.	Maintain project information. **Note.** This page is available only when Project Costing is implemented.
Project Activities	SPA_PROJ_ACT	• Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Project Activities • Services Procurement, Manage Projects and Activities, Project Activities	Define a project activity.

Page Name	*Definition Name*	*Navigation*	*Usage*
Service Activities	SPB_SETID_ACTIVITY	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Services, Service Activities • Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Service Activities	Define service activities for deliverables-based services.
Bid Factors by Activity	SP_BDFTR_BY_ACT_PG	Click the Bid Factors by Activities link on the Service Activities page.	Define the bid factors by deliverable activity.
Bid Factor Group	SP_BDFTR_GRP_SRCH	Click the Select Bid Factor Group link on the Bid Factor by Activities page.	Select bid factors to add to the service activity.
Activities by Service	SPB_SRC_ACT	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Services, Activities by Service • Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions,	Associate one or more activities with a service.
Activities by Service Type	SP_ACT_BY_SVTYP	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Services, Activities by Service Type • Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Activities by Service Type	Associate one or more activities with a service type. **Note.** This page is available only when Project Costing is not implemented.

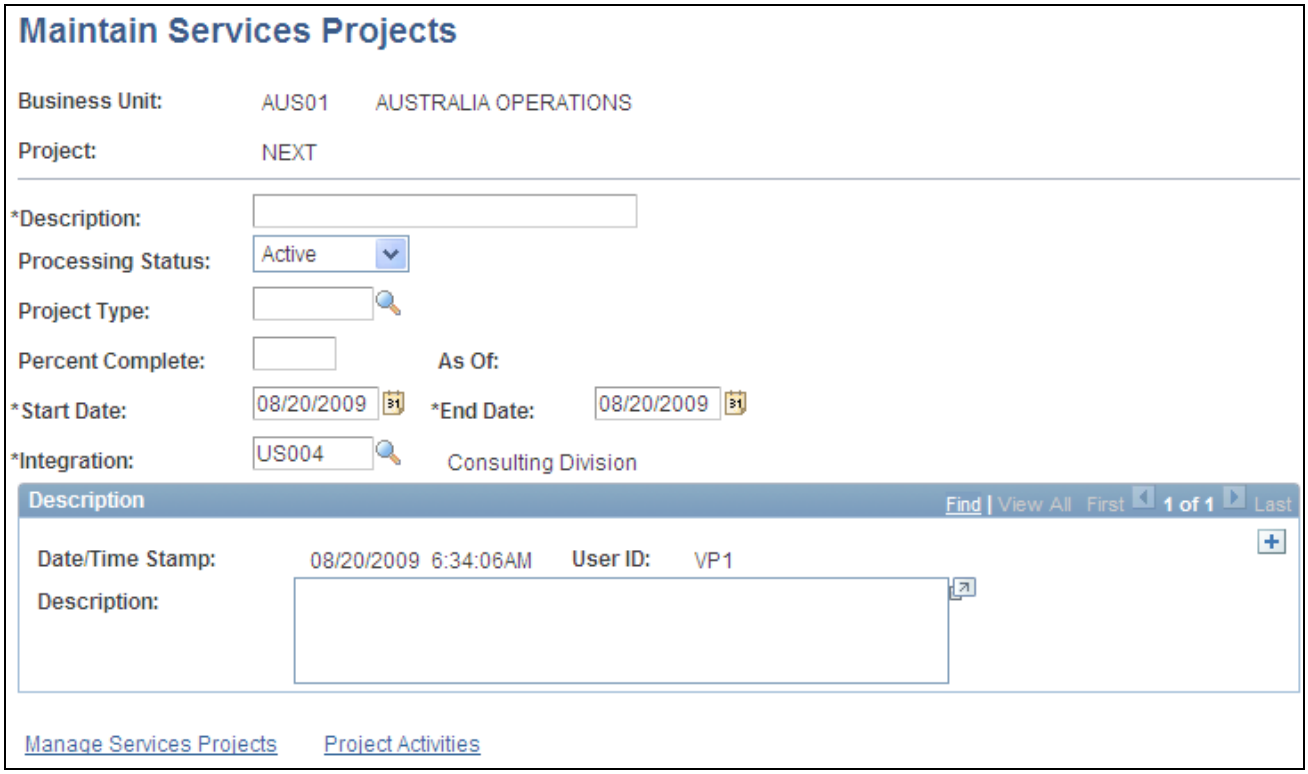
Defining Project Types

Access the Project Types page (Services Procurement, Define Services Procurement, General Setup, Project/Activities Definitions, Project Types).

Projects are classified in groups called *project types.* For example, you can have construction projects, maintenance projects, and capital projects. Setting up project types and assigning them to projects enables you to analyze all projects of a certain type in relation to one another.

Maintaining Service Projects

Access the Maintain Services Projects page (Services Procurement, Define Services Procurement, General Setup, Project/Activities Definitions, Service Projects. Click the Add button or click the link for an existing project on Manage Services Projects page).



Maintain Services Projects page

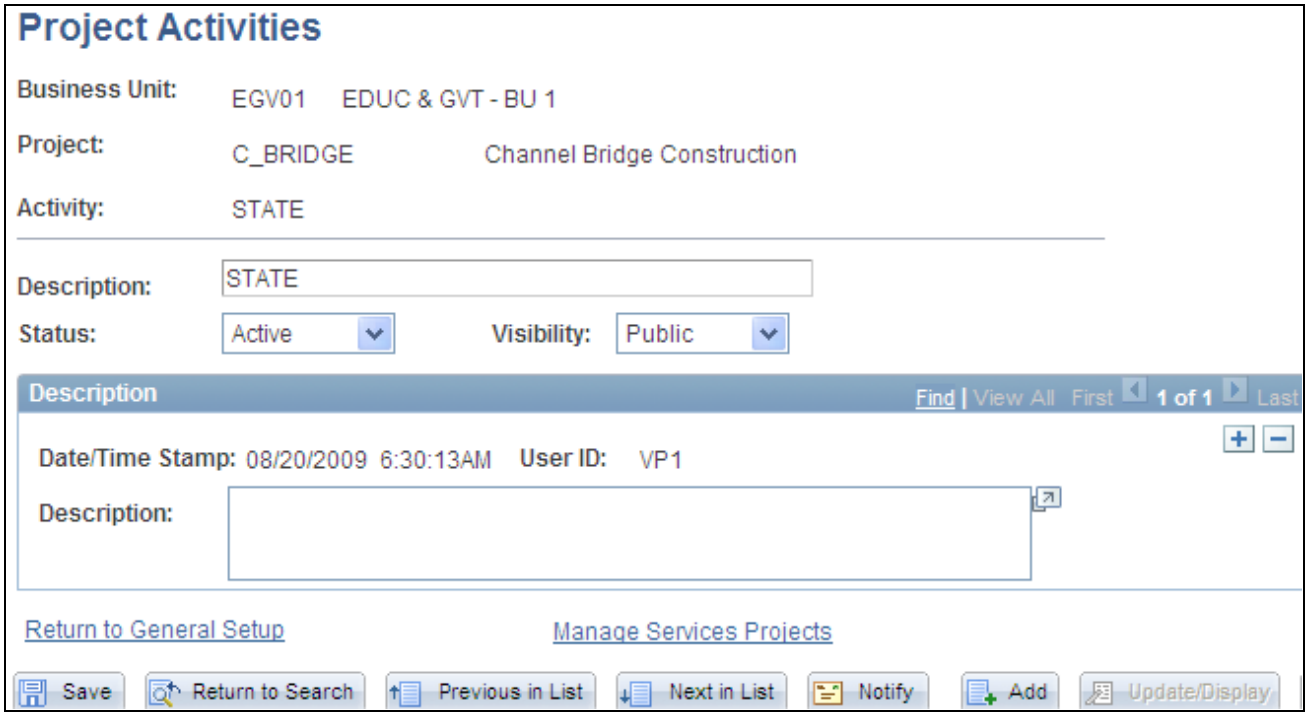
Processing Status	Select the activity status. Values are *Active* and *Inactive.*
Project Type	Enter the project type.
Percent Complete	Enter the percentage completed for the activity and the as of date for the specified percentage.
Start Date	Enter the project start date.

End Date Select the project end date

Time Template Enter the time template associated with the project

Defining Project Activities

Access the Project Activities page (Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Project Activities).



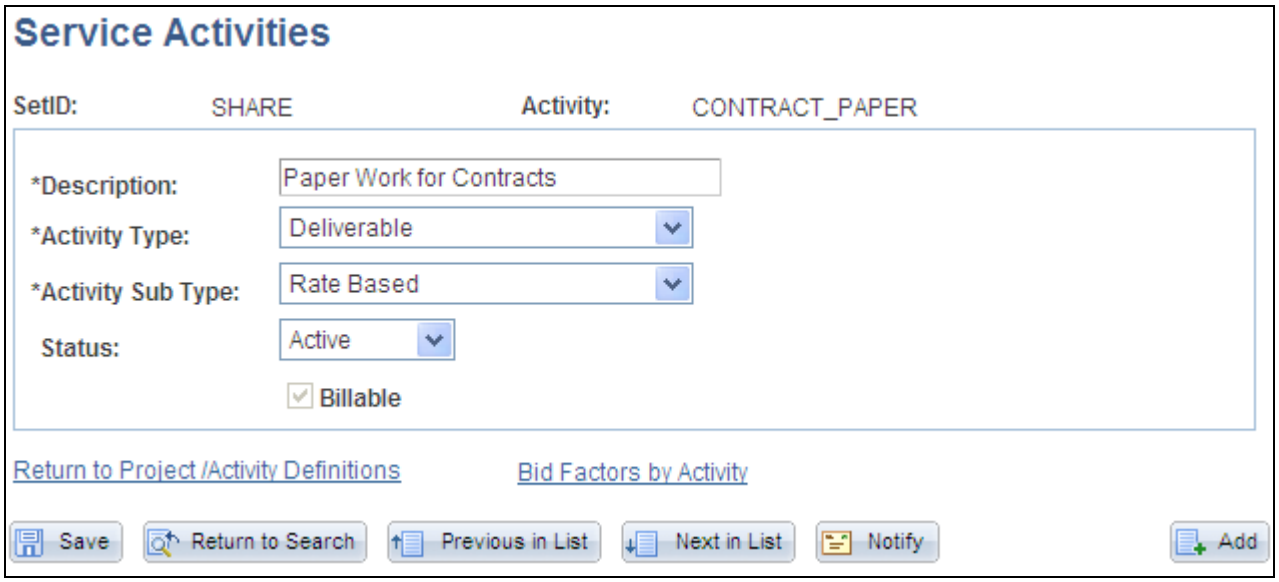
Project Activities page

Description Enter the activity description.

Status Select the activity status. Values are *Active* and *Inactive.*

Setting Up Service Activities

Access the Service Activities page (Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Service Activities).



Service Activities page

When Project Costing is not installed, service activities replace project activities and are used for both resource and deliverable-based services. When Project Costing is installed, service activities are defined for resource-based generic activities and for deliverables-based services. When the deliverables-based service is selected on a requisition, the activities linked to the service are also linked to the requisition. The bid factors linked to the activities appear by default on the Bid Factors by Requisition page.

Unlike project activities, service activities are not linked to projects. Therefore, service activities can be shared across projects.

Activity Type

Select an activity type. Values are:

- *Deliverable:* Select to activate the Activity Sub Type field values of *Rate Based* and *Milestone* activities.
- *Resource:* Select to activate the Activity Sub Type field values of *Generic Activity* and *Specific Activity.*

Activity Sub Type

Activity sub type is used to indicate the type work that this activity can be used for. The available values depend on the activity type that was selected.

When the activity type is *Resource*, the available Activity Sub Type values are *Generic Activity* and *Specific Activity.* Specific activities can be associated with resource-based service types and selected on related work orders to make them available during time entry. Generic activities are not related to work orders, but are available during time entry for any resource-based work order.

When the Activity Type is *Deliverable*, the available Activity Sub Type values are *Milestone* and *Rate Based.* Specific activities can be associated with deliverable-based work orders to make them available during time entry.

Status Select a status. Values are *Active*and *Inactive.*

Inactive activities cannot be added to a service type or work order.

Billable Select to indicate that time associated with this activity is billable. This value acts as a default for the Activities by Service Type page.

Bid Factors by Activity Click to access the Bid Factors by Activity page. You use the page to associate bid factors with activities. When you enter a service on a deliverable-based requisition, the bid factors linked to the activities for the service appear on the requisition. This enables suppliers to enter responses to these bid factors. The suppliers responses can be compared with each other to determine which supplier has the best bid.

Click Select Bid Factor Group to select bid factors from existing bid factor groups. Click OK to return to the Bid Factors by Service page.

Setting Up Activities by Service

Access the Activities by Service page (Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Services, Activities by Service).

Activities can be linked to deliverables-based services. If activities exist that are typically performed for a service, you can link the activities to the service. When a requisition is created for a deliverables-based requisition, the activities linked to that service appear by default on the requisition, as well as bid factors linked to the activity.

Activity Enter an activity to associate with a service.

Rate Amount Enter a deliverable rate amount.

Note. This option is used for rate-based activities only.

Rate Unit of Measure Enter the rate in the unit of measure that is used throughout the fulfillment process.

Note. This option is used for rate-based activities only.

Allow Delete Activity Use this option during sourcing to control whether the service coordinator can remove bid factors associated with this activity from a requisition.

Setting Up Activities by Service Type

Access the Activities by Service Type page (Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Services, Activities by Service Type).

Activities can be linked to service types when Project Costing is not implemented. The activities available for a work order will be limited to those that have been linked to the related service type.

Activity	Enter an activity to associate with a service type.
Billable	Indicate whether this is a billable activity for the service type.
Status	Indicate whether the status of the activity is active or inactive for the service type. Inactive activities cannot be selected during time or progress entry.

Establishing Services Procurement ChartField Security

ChartFields are the fields that store charts of accounts and provide the system with the basic structure to segregate and categorize transactional and budget data. PeopleSoft software enables you to restrict access to your financial data within PeopleSoft Services Procurement 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 software enable you to restrict access by business unit, ledger, setID, pay cycle, 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 requisitions and work order costs, and still restrict access to sensitive data, such as service costs. Using ChartField security, you can enable access to sensitive ChartField combinations by user IDs, user roles, or permission lists.

The following components in PeopleSoft Services Procurement can be restricted with ChartField security:

- SPF_WORK_ORDER_CMP – Work Order Component (secures prompt edit table values).
- SPF_WORK_ORDER_CMP – WorkOrder Component (secures work order cost information).
- SPF_REQ_LINE – Maintain SP Requisition Line (secures prompt edit table values).
- SPF_REQ_SUMMARY – SP Requisition Summary (secures requisition line job information).

The core system for setting up and using ChartField security is described in the ChartField Security feature, including specific information about PeopleSoft Services Procurement components. For more information, see the Securing ChartFields chapter of the PeopleSoft Components for FSCM 9.1 PeopleBook.

Chapter 5

Setting Up Application Specific Options for PeopleSoft Services Procurement

This chapter provides a list of prerequisites and discusses how to:

- Maintain service setup.
- Setting up integration for work order logistical tasks with Microsoft Outlook.
- Define service supplier setup.
- Define sourcing setup.
- Maintain users and team setup.
- Maintain workflow setup.
- Maintain settlement setup.

Prerequisites

You must perform the following:

- Register user profiles.
- If you want to be able to replace service coordinators, you must define a URL for the email notification.

  Modify the SP_REPLACESC_EM and SP_REPLACETEAM_EM URL identifiers on the URL Maintenance page (PeopleTools, Utilities, Administration, URLs) to indicate the location to which email notifications should be sent regarding the replacement service coordinators or teams.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Replacing Service Coordinators, page 159

Maintaining Service Setup

To define competency types, use the Competency Types (RS_CM_TYPE_TABLE) component. To define competencies, use the Competencies (RS_CM_COMPTNCY_TBL) component. Use the RS_CM_COMPTNCY_TBL component interface to load data into the tables for this component.

To set up competencies by setID, use the Competency by Set ID (SP_COMP_BY_SETID) component. To maintain role distribution, use the Role Distribution (SP_DSTRLST) component.

To set up rating models, use the Rating Models (RS_CM_REVW_RAT_TBL) component.

To capture years of experience, use the Maintain Experience (SP_EXPERIENCE) component. To maintain service requests, use the Service Request Type (SP_REQUEST_TYPE) component. To set up service types by service, use the Service Types by Service (SPB_PJROLE_SERVICE) component.

To maintain logistical tasks, use the Logistical Task (SPB_TASK_CMP) component. To define logistical task groups, use the Logistical Task Group (SPB_TASK_GROUP_CMP) component. To associate tasks by task groups, use the Assign Tasks to Task Group (SPB_TASKTOGROUP) component.

To set up service types, use the Service Types (SPB_ROLE_TYPE) component.

To maintain rate sheets, use the Services Rate Sheet (SPB_RATESHEET) component. To set up services/roles by service types, use the Services/Roles by Service Types (SPB_ROLESBYTYPE) component. To set up service and project role attributes, use the Service/Project Roles Attributes (SPB_ROLE_COMP) component. To assign task groups to service types, use the Assign Tasks Groups to Service Types (SPB_ROLE_TASKGP) component.

This section discusses how to:

- Maintain role distribution lists.
- Maintain competencies.
- Maintain competencies by setID.
- Maintain rating models.
- Maintain service types.
- Maintain services/roles by service type.
- Maintain service/project role.
- Maintain service/project role attributes.
- Maintain rate sheets.
- View rate sheet lists.
- Maintain logistical tasks.

Pages Used to Maintain Service Setup

Page Name	*Definition Name*	*Navigation*	*Usage*
Service Request Types	SP_REQUEST_TYPE	• Services Procurement, Define Services Procurement, Service Setup, Service Request Type • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Request Type	Maintain service request types.
Role Distribution List	SP_DSTRLST	• Services Procurement, Define Services Procurement, Service Setup, Role Distribution Lists • Set Up Financials/Supply Chain, Product Related, Services Procurement, Role Distribution Lists	Specify the role distribution lists that receive work order surveys and alerts.
Competency Types	RS_CM_TYPE_TBL	• Services Procurement, Define Services Procurement, Service Setup, Competency Setup, Competency Types • Set Up Financials/Supply Chain, Common Definitions, Resource Data, Competency Types	Enter a long or short description for new competency types.
Competency	RS_CM_COMPTNCY_TBL	• Services Procurement, Define Services Procurement, Service Setup, Competency Setup, Competencies • Set Up Financials/Supply Chain, Common Definitions, Resource Data, Competencies	Define competencies.

Page Name	*Definition Name*	*Navigation*	*Usage*
Competencies by SetID	SP_COMPBYSETID_PG	Services Procurement, Define Services Procurement, Service Setup, Competency Setup, Competencies by SetID	Define competencies by setID.
Rating Model	RS_CM_REVW_RAT_TBL	• Services Procurement, Define Services Procurement, Service Setup, Competency Setup, Rating Models • Set Up Financials/Supply Chain, Common Definitions, Resource Data, Rating Models	Select the model used to rate a candidate's competency.
Service Types	SPB_ROLE_TYPE	• Services Procurement, Define Services Procurement, Service Setup, Service Type Setup, Service Types • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Services, Service Type	Set up service types.
Service/Roles by Service Type	SPB_ROLESBYTYPE	• Services Procurement, Define Services Procurement, Service Setup, Service Type Setup, Services/Roles by Service Type • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Services, Services/Roles by Service Type	Define Service (project roles) by role type.

Page Name	*Definition Name*	*Navigation*	*Usage*
Surveys by Service Type	SP_SURVEY_BY_SVTYP	• Services Procurement, Define Services Procurement, Service Setup, Service Type Setup, Surveys by Service Type • Set Up Financials/Supply Chain, Product Related, Services Procurement, Surveys, Surveys by Service Type	Associate service type with one or more surveys.
VMS by BU Service Type	SPB_VMS_BU_SRVC	Services Procurement, Define Services Procurement, Service Setup, Service Type Setup, VMS by BU Service Type	Associate the VMS supplier by business unit and service type. **Note.** This page is only available if you do not have the Managed Service Provider Installation option enabled on the Services Procurement Installation Options page. See Chapter 10, "Establishing and Managing VMS," page 257.
Assign Individual Services to Multi Resource Service	SPB_MULTI_SRVC	Services Procurement, Define Services Procurement, Service Type Setup, Service Type/Service by Multi Resource Service Type/Service	Maintain service type/service by multi-resource service type.
Service/Project Role	SPB_PROJ_ROLE	• Services Procurement, Define Services Procurement, Service Setup, Service (Project Role) Setup, Service/Project Role • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Services, Service/Project Role	Set up service (project role).

Page Name	*Definition Name*	*Navigation*	*Usage*
Service/Project Role Attributes	SPB_ROLE_COMP_PG	• Services Procurement, Define Services Procurement, Service Setup, Service (Project Role) Setup, Service/Project Role Attribute • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Services, Service/Project Role Attribute	Maintain service (project role) attributes
Service Types by Service	SPB_PJROLE_SERVICE	• Services Procurement, Define Services Procurement, Service Setup, Service (Project Role) Setup, Service Types by Service • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Services, Service Types by Role	View service types associated with services.
Years of Experience	SP_EXPERIENCE_PG	• Services Procurement, Define Services Procurement, Service Setup, Service (Project Role) Setup, Experience • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Services, Years of Experience	Maintain Experience values.

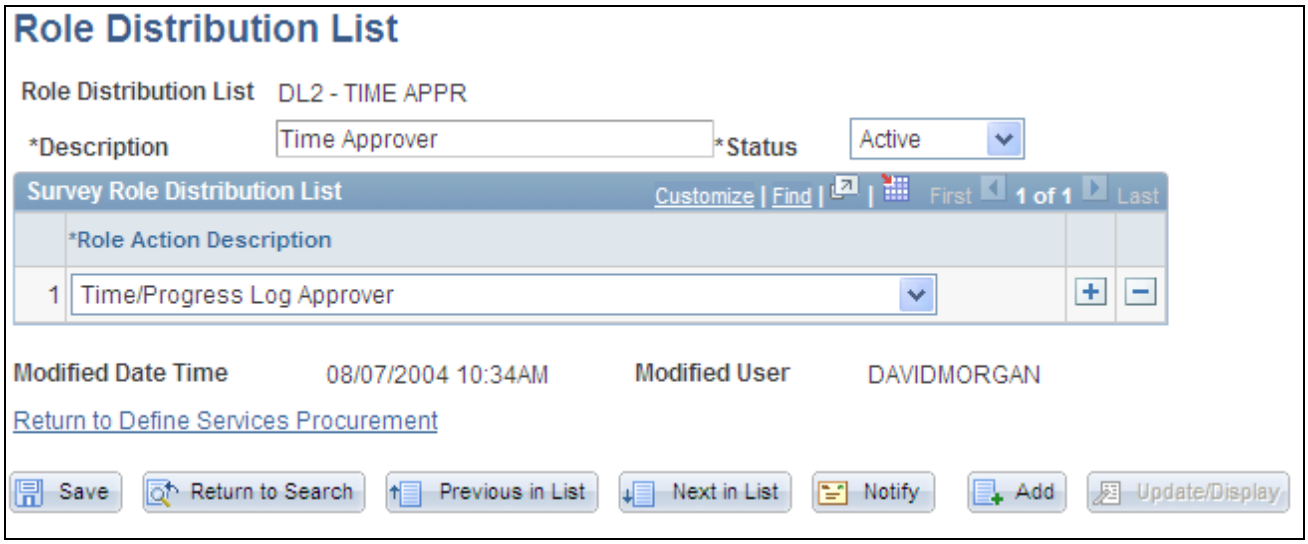
Page Name	*Definition Name*	*Navigation*	*Usage*
Maintain Rate Sheets	SPB_RATESHEET_NEW	• Services Procurement, Define Services Procurement, Service Setup, Rate Sheet Setup, Maintain Rate Sheets • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Regions/Rate Sheets, Maintain Rate Sheets	Maintain standard rates by region and service (project role).
Rate Sheet List	SPB_RS_LIST	• Services Procurement, Define Services Procurement, Service Setup, Rate Sheet Setup, Rate Sheet List • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Regions/Rate Sheets, Rate Sheets List	View rate sheet lists.
Logistical Task	SPB_TASK_PG	• Services Procurement, Define Services Procurement, Service Setup, Tasks and Task Groups, Logistical Tasks • Set Up Financials/Supply Chain, Product Related, Services Procurement, Work Order Tasks, Logistical Tasks	Maintain work order logistical tasks.

Page Name	*Definition Name*	*Navigation*	*Usage*
Logistical Task Group	SPB_TASK_GROUP_PG	• Services Procurement, Define Services Procurement, Service Setup, Tasks and Task Groups, Logistical Task Group • Set Up Financials/Supply Chain Management, Product Related, Services Procurement, Work Order Tasks, Logistical Task Group	Define logistical task groups.
Tasks by Task Groups	SPB_TASKTOGROUP_PG	• Services Procurement, Define Services Procurement, Service Setup, Tasks and Task Groups, Tasks by Task Groups • Set Up Financials/Supply Chain Management, Product Related, Services Procurement, Work Order Tasks, Tasks by Task Groups	Associate one or more tasks to a task group.
Task Group by Service Type	SPB_ROLE_TASKGP_PG	• Services Procurement, Define Services Procurement, Service Setup, Tasks and Task Groups, Task Group by Service Type • Set Up Financials/Supply Chain Management, Product Related, Services Procurement, Work Order Tasks, Task Group by Service Type	Define task groups by service type.

Page Name	*Definition Name*	*Navigation*	*Usage*
Response Types	SP_SUR_RESTYP	• Services Procurement, Define Services Procurement, Service Setup, Survey Setup, Response Types • Set Up Financials/Supply Chain Management, Product Related, Services Procurement, Surveys, Response Types	Define formats and answer choices for work order survey questions. See Chapter 23, "Using Surveys in PeopleSoft Services Procurement," page 599.
Survey Setup	SP_SUR_DEFN	• Services Procurement, Define Services Procurement, Service Setup, Survey Setup, Survey Setup • Set Up Financials/Supply Chain Management, Product Related, Services Procurement, Surveys, Survey Setup	Define questions, role distribution lists and response types for work order surveys. See Chapter 23, "Using Surveys in PeopleSoft Services Procurement," page 599.
Survey Setup - Service Type	SP_SUR_DEFN_SVTYP	Select the Service Type tab on the Survey Setup page.	View the service types related to the survey.

Maintaining Role Distribution Lists

Access the Role Distribution List page (Services Procurement, Define Services Procurement, Service Setup, Role Distribution Lists).



Role Distribution List page

Use role distribution lists to send survey and work order alert notifications.

Role Distribution List Indicates the name of the new distribution list.

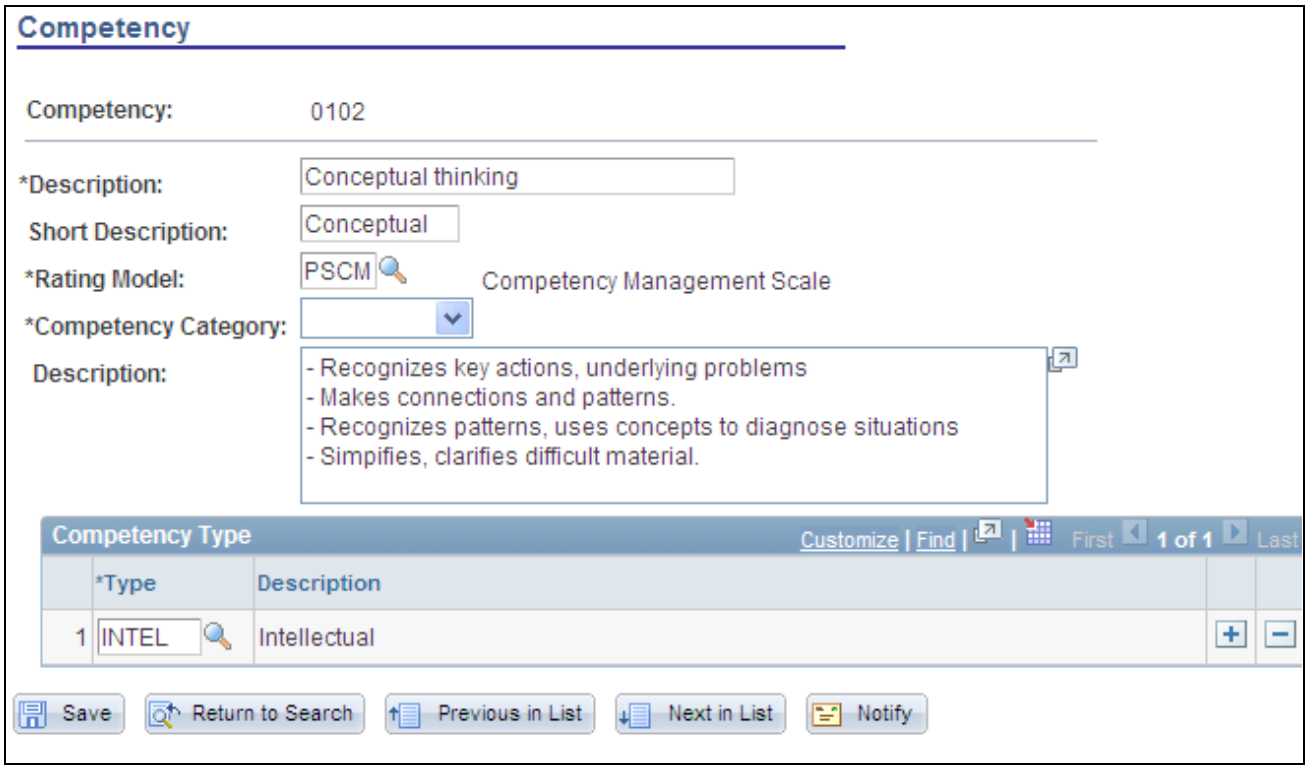
Role Action Description Select from the available work order role actions for the distribution list.

See Also

Chapter 23, "Using Surveys in PeopleSoft Services Procurement," Setting Up Surveys, page 599

Maintaining Competencies

Access the Competency page (Services Procurement, Define Services Procurement, Service Setup, Competency Setup, Competencies).



Competency page

Use competencies from requisitions to indicate the skills that you need on the project.

Competencies also exist in the PeopleSoft Human Resource Management (PeopleSoft HRMS) database. If you are integrating with a PeopleSoft HRMS database, access the Resource Management Installation options page and define which product "owns" the competency tables.

Rating Model Select the model used to rate a candidate's competency.

Competency Type

Type and **Description** Enter values to create a logical grouping of competencies.

Maintaining Competencies by SetID

Access the Maintain Competencies by SetID page (Services Procurement, Define Services Procurement, Service Setup, Competency Setup, Competencies by SetID).

Competency Select to determine which competencies are available for selection when defining service attributes or creating requisitions and work orders.

Maintaining Rate Models

Access the Rating Model page (Services Procurement, Define Services Procurement, Service Setup, Competency Setup, Rating Models).

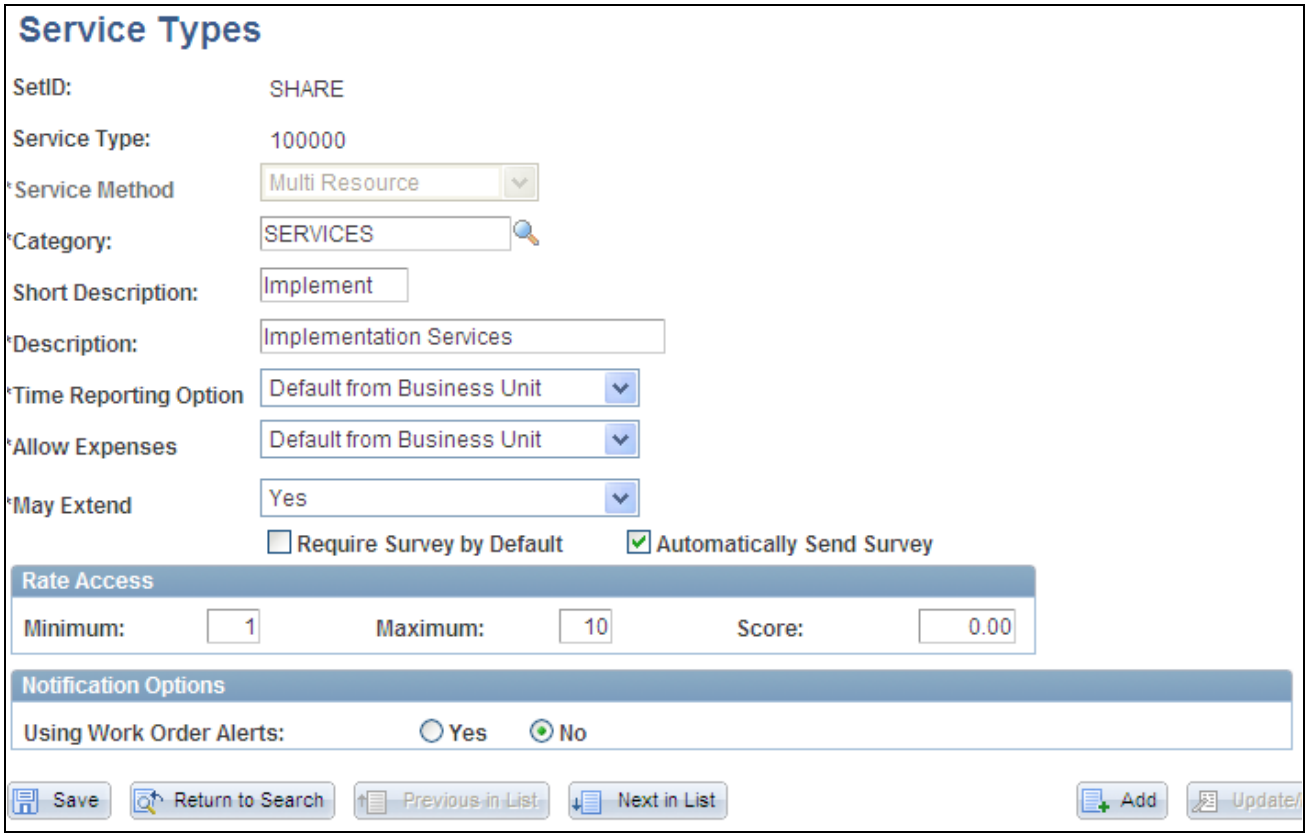
Rating Enter a rating number. Use this number to determine the range for the best and worst ratings.

Review Pts (review points) Enter the review points associated with the rating code, if desired.

Note. This value is not used within services procurement.

Maintaining Service Types

Access the Service Types page (Services Procurement, Define Services Procurement, Service Setup, Service Type Setup, Service Types).



Service Types page

Service types are a way of grouping roles or services. For example, you can have a service type of DEV and roles of java developer, QA engineer, and so forth that are linked to that service type. You define service types at the setID level.

Service Type

Enter a name for the service type. After you save the service type, you cannot update the name.

Service Method

Select the service method for the service type. Available options are:

Deliverable: Select to request services that are generally performed by an entire work force, such as a requisition for an entire project, not just the hours worked by a single service provider.

Multi Resource: Select to request services that support multiple unique services and service providers. When you select this value and enter a service type, the system displays the Multi Services Information grid box when you enter a service type.

Resource: Select to request the services of an individual service provider.

Track Resources

Use this option to track resources for deliverable-based work orders. The system firsts looks to the service type to determine if resources should be tracked for deliverable-based work orders. If you do not select this option, the business unit setting is used.

Note. This option is only available for deliverable-based engagements.

Category

Select the item category for the service type.

Time Reporting Option

Use this option to determine whether service types with a service method of *Resource* require the service provider to report time against specific ChartField combinations, or whether the total time is entered and distribution percentages automatically split time or progress according to the ChartField distribution defined for the work order. Values are:

- *Actual Allocation:* Select to enable the service provider to report actual time against each ChartField distribution line defined on the work order.
- *Default from Business Unit:* Select to use the default reporting option specified for the business unit.
- *Percent Allocation:* Select to enable the service provider or service provider contact to report total time or progress against a work order.

  The distribution percentage is used to automatically allocate time or progress across the predefined ChartField distribution lines.

Note. Service types defined with a service method of *Deliverable* are automatically set to a time reporting option of *Percent Allocation.*

Allow Expenses

Select how you want to track and report expenses for assignments. You can use the default value assigned at the business unit level, allow expenses or not allow expenses.

Note. When you select *Yes* value, the expense rate and expense amount fields are available on requisitions and work orders.

You can also enter and modify expenses for Progress Logs and Invoices.

May Extend

Select the value that you want to control whether requesters or service coordinators can extend requisitions or work orders that use this service type. Extending a requisition or work order enables a service to be assigned to a fixed-price requisition or multiple-unique service providers that can be sourced to a requisition to fill the required services. When the requisition is filled, the system enables the multiple-unique service providers to report time against a single work order. Service providers can enter time against multi-resource work orders and then the reported time triggers consumption against a single top-line, multi-resource work order.

Field values include:

Default from Business Unit: Select to use the value defined for the May Extend check box on the Services Procurement Bus Unit page. When the check box is selected requesters and service coordinators can extend requisitions or work orders. When the check box is deselected, they cannot extend requisitions or work orders.

No: Select to prevent requesters or service coordinators from extending requisitions or work orders that use this service type.

Yes: Select to enable requesters and service coordinators to extend requisitions and work orders that use this service type.

Require Survey by Default

Select to indicate that surveys are mandatory for work orders that are associated with the specified service type. If you select this check box, surveys must be complete before the work order is finalized.

Note. You can override the status of a mandatory survey on a work order.

Automatically Send Survey

Select to indicate that a survey will be automatically sent to a recipient at the time the work order is terminated, closed, or canceled. If a survey is not sent automatically, then you must click the Send Survey to Recipients button on the work order.

Note. If a survey is automatic, it is sent to all recipients that are tied to the role as specified on the role distribution list.

Rate Access

Minimum and **Maximum**

Enter the minimum and maximum number of suppliers to be returned from the sourcing rules.

Score

Enter a score range between 0 and 100. Supplier scores must fall within the required score range to meet requisition source requirements.

Notification Options

The field values in this group box are identical to the field values that are discussed on the Services Procurement - Work Order Settings page. For more information about the notification option settings on this page, refer to the Defining Work Order setting section within this PeopleBook.

See Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining Work Order Settings, page 48.

Using Work Order Alerts Select to define alerts for work orders. Alert values on the service type default onto the work order alerts if alert defaults are not previously taken from the Requester Defaults or Service Coordinator Defaults.

See Also

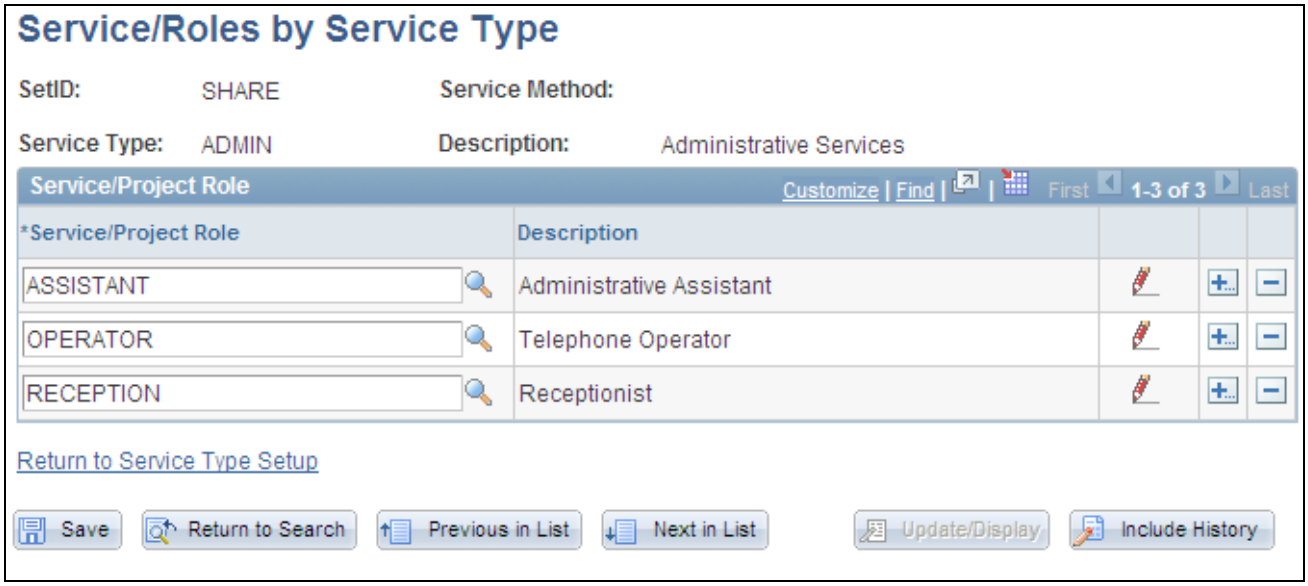
Chapter 19, "Managing Time in PeopleSoft Services Procurement," page 477

Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining Work Order Settings, page 48

Chapter 18, "Managing Work Orders," page 413

Maintaining Service/Roles by Service Type

Access the Service/Role by Service Type page (Services Procurement, Define Services Procurement, Service Setup, Service Type Setup, Services/Roles by Service Type).



Service/Role by Service Types page

Service types are a way of grouping roles or services. For example, you can have a service type of DEV and roles of java developer, QA engineer, and so forth that are linked to that service type. When a service type is selected on a requisition, the services and roles that you can select are only those which are linked to the service type using this page.

Service/Project Role Select the title for the services and project role.

Description Displays the description for the services and project role.

Maintaining Multi-Resource Services

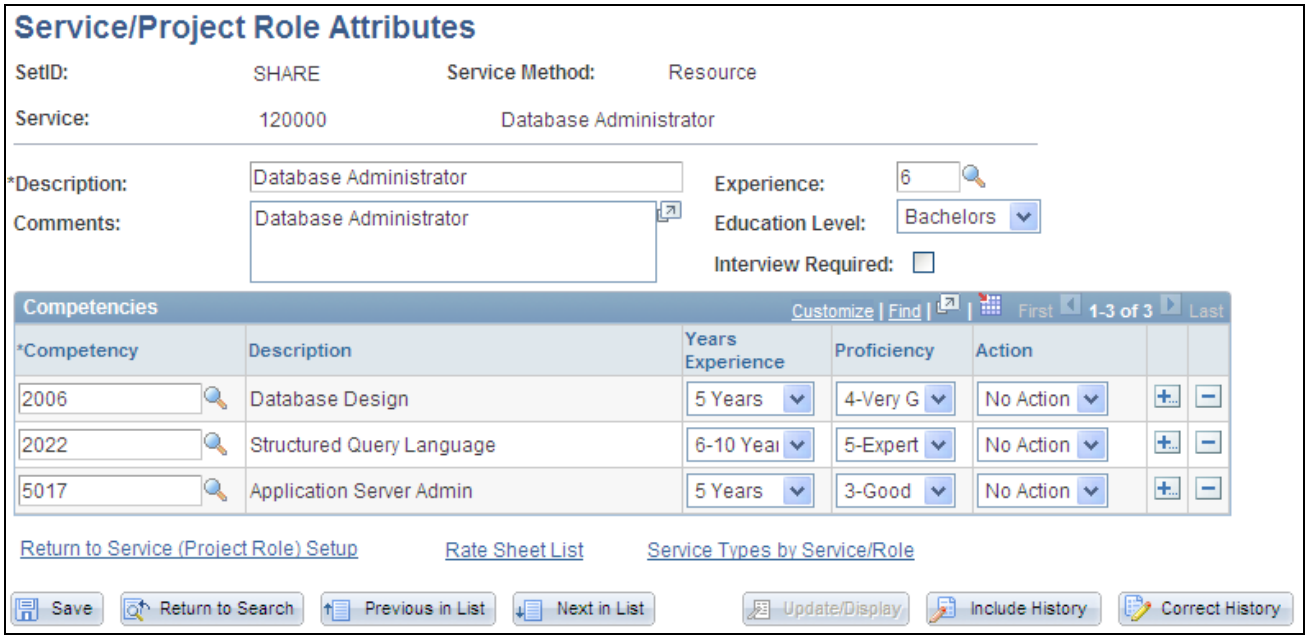
Access the Assign Individual Services to Multi Resource Service page (Services Procurement, Define Services Procurement, Service Setup, Service (Project Role) Setup, Multi Resource Assignments).

You use this page to assign default information for individual services related to a multi-resource service requisition or work order. The services identified here can then be automatically associated to a transaction for the specified multi-resource service.

Service/Project Role Select a service and project role combination that you want to use.

Maintaining Service/Project Role Attributes

Access the Service/Project Role Attributes page (Services Procurement, Define Services Procurement, Service Setup, Service (Project Role) Setup, Service/Project Role).



Service/Project Role Attributes page

Service and project role attributes appear by default on the requisition. Define them here for simplified requisition entry.

Description Enter the description of the service (project role).

Note. This value appears by default on the requisition as the job title.

Comments Enter comments that describe the service (project role).

Note. This value appears by default on the requisition as the scope of work.

Experience

Enter the years of experience that this service (project role) requires.

Note. This value appears by default on the requisition as the experience.

Education Level

Enter the lowest level of education that this service (project role) requires.

Note. This value appears by default on the requisition as the education level.

Interview Required

Select if this service (project role) requires an interview before hiring someone for the position. If an interview is required, the system does not allow a service provider to be hired until interviews have been conducted.

Note. This value appears by default on the requisition as the interview required.

Competencies

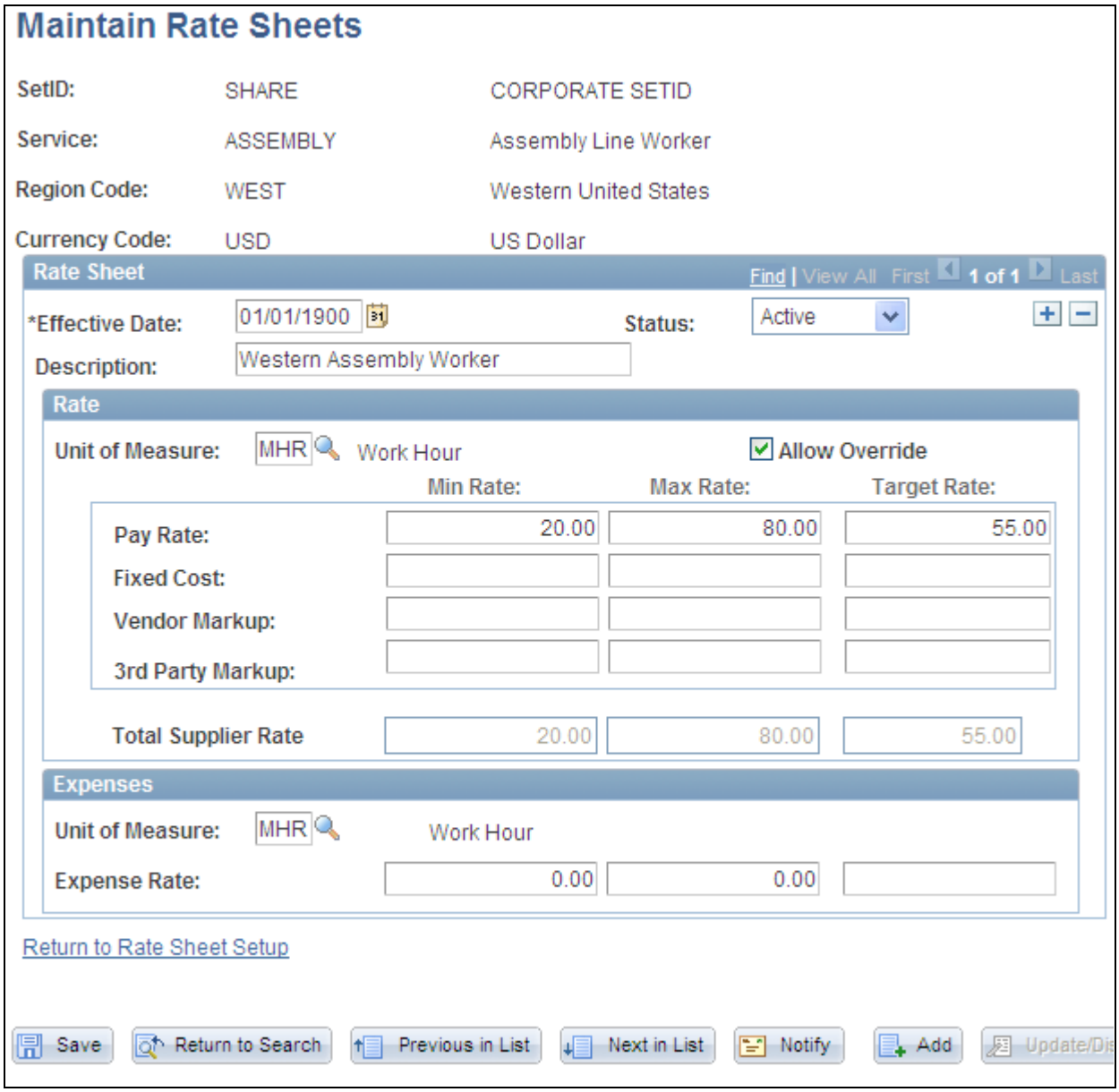
Add or delete competencies to a service.

Note. The competencies associated to the services default onto the requisition.

Note. The experience, education level and interview required fields are available only for resource-based requisitions. Experience and education level are informational only and are not used to filter resource skills on a requisition or work order.

Maintaining Rate Sheets

Access the Maintain Rate Sheet page (Services Procurement, Define Services Procurement, Service Setup, Rate Sheet Setup, Maintain Rate Sheets).



Maintain Rate Sheets page

Use rate sheets to enforce that rates entered on a requisition are reasonable for a particular location. Rate sheets are defined for a region, project, role and currency. Rate sheets are only applicable to resource-based roles and services, because deliverables-based services are created for an entire amount, not a specific rate.

Rate

Allow Override Select to override the default rate defined on the rate sheet when you create requisition or work orders.

Min Rate (minimum rate) Enter the minimum rate amount that requesters should use when creating a requisition for the rate sheet role, region, and currency.

Max Rate (maximum rate) Enter the maximum rate amount that requesters should enter when creating a requisition for the rate sheet role, region, and currency.

Target Rate Enter the rate that appears by default when creating a requisition for the rate sheet role, region, and currency.

Note. If you select SP Pay Types Enabled on the Services Procurement Installation Options page, you can enter minimum, maximum, and target rates for pay rate, fixed cost, vendor markup, and third-party markup rates on the rate sheet.

Expenses

If you have expenses enabled for the business unit, you can associate expense rates to the rate sheet.

Viewing Rate Sheet Lists

Access the Rate Sheet List page (Services Procurement, Define Services Procurement, Service Setup, Rate Sheet Setup, Rate Sheet List).

Region Select to access the Maintain Rate Sheets page, where you can access the rate sheet for the selected region and service and also view the rate breakdown.

Maintaining Logistical Tasks

Access the Logistical Tasks page (Services Procurement, Define Services Procurement, Service Setup, Tasks and Task Groups, Logistical Tasks).

You associate logistical tasks with a work order when the work order is created manually or generated from a requisition. The tasks related to the service type selected on the work order are automatically linked to the work order.

Work Order Type Select a work order type. Values are:

- *Original:* Select to associate the logistical task to normal work orders.
- *Extension:* Select to associate the logistical task ton extended work orders.
- *Both:* Select to associate the logistical task to both normal and extended work orders.

Approval Type

Select work order approval type. Values are:

- *Pre-approval:* Select if tasks must be completed after creating the work order and before submitting the work order for approval.

  For example, a pre-approval logistical task might include assigning a new badge or ordering a new laptop.

- *Post-approval:* Select if tasks must be completed after the work order is approved and before a work order is released to a service provider.

  For example, a post-approval logistical task might include scheduling orientation or setting up the service provider email account.

- *Off-board:* Select if tasks must be completed after the work order release date and before closing the work order.

  For example, off-board logistical tasks might include collecting the laptop or closing the email account after the service provider has quit the job.

Terminate: Select if supplier must confirm a termination action before continuing with the work order.

Execution Type

Select work order execution type. Values are:

- *Automatic:* Select if tasks assigned to the work order are automatically assumed to be complete.

  Note. An email notification is automatically sent to the appropriate person.

- *Mandatory:* Select if pre-approval tasks have to be completed before approving the work order or if post-approval tasks have to be completed before releasing the work order.

- *Optional:* Select if it is optional to complete the tasks before approving or releasing the work order.

Assign To

Select a default assigned to person. This field dynamically generates and assigns logistical tasks to the default assigned to person. Email notification is automatically sent to this person. Values are:

- *Invoice Approver*
- *Requester*
- *Time Approver*
- *Service Provider Contact*
- *Other*: If you select *Other*, you must specify the user who will perform the task.

Setting Up Integration for Work Order Logistical Tasks with Microsoft Outlook

This section provides an overview of how Desktop Integration can be used to integrate work order logistical tasks with Microsoft Outlook and discusses how to:

- Enable task integration.
- Assign a system ID.
- Register Services Procurement logistical tasks for Desktop Integration.
- Set up Desktop Integration to share work order tasks.
- Set up Microsoft Outlook to integrate with work order logistical tasks.

Understanding How Desktop Integration Can Be Used to Integrate Work Order Logistical Tasks with Microsoft Outlook

This section discusses:

- Desktop Integration and PeopleSoft Services Procurement.
- Desktop Integration process flow.
- Email workflow.

Desktop Integration and PeopleSoft Services Procurement

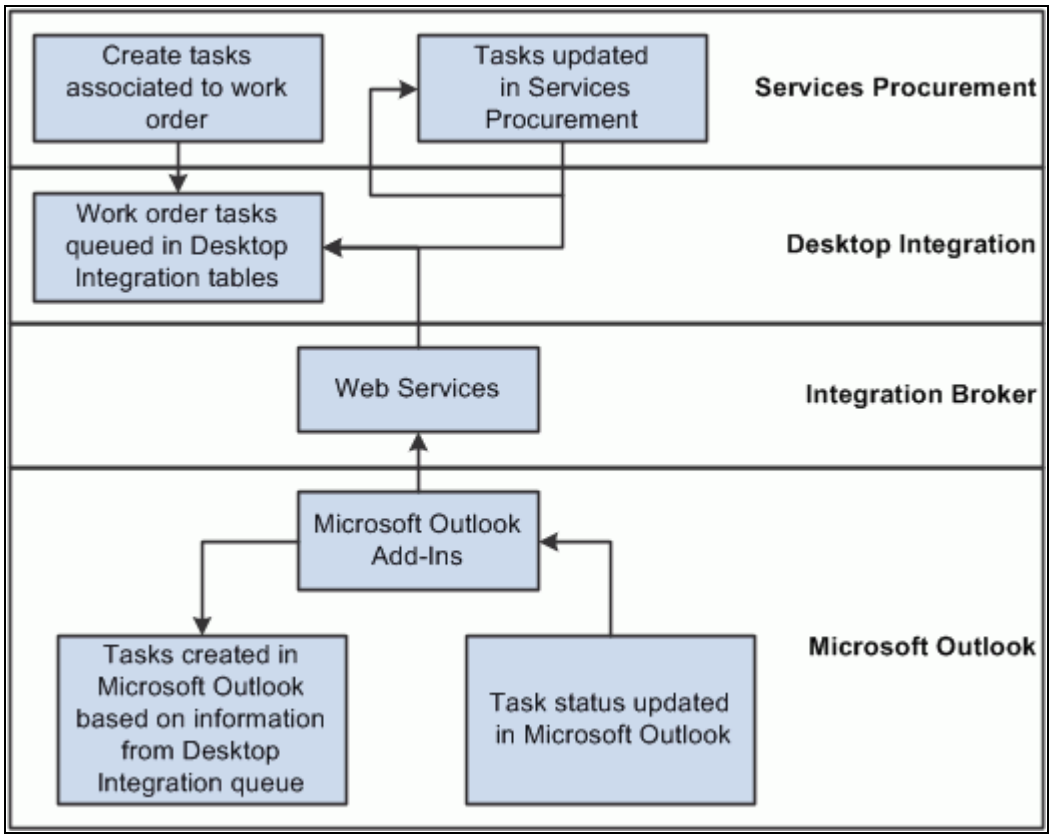
Desktop Integration framework provides integration between Microsoft Outlook and PeopleSoft applications, enabling you to schedule and track appointments, meetings, tasks, and corresponding documentation with Microsoft 2007 Outlook and later versions. You can set up Desktop Integration to share PeopleSoft Services Procurement work order logistical tasks with Microsoft Outlook enabling you to carry out work order logistical tasks without being signed in to the PeopleSoft system.

The Desktop Integration framework enables work order-associated tasks to be passed from Services Procurement to Microsoft Outlook clients as standard Outlook tasks. Updates that are made to the tasks in Outlook can then be sent back to Services Procurement, where they can be acted upon within Services Procurement.

See *PeopleSoft 9.1 PeopleBook: Integration Interfaces*, "Using Desktop Integration."

Desktop Integration Process Flow

This diagram illustrates how work order logistical tasks originate in PeopleSoft Services Procurement and, by means of Desktop Integration tables and the Integration Broker, interact with Microsoft Outlook Add-Ins to create the task in Outlook. From there, you can update the task in Microsoft Outlook and, using the same services, send the updated task back to Services Procurement.



Desktop Integration process flow

To start the integration, you create and save a work order in PeopleSoft Services Procurement. The system associates the required logistical tasks with the work order. When you save the work order:

1. The system extends the base application class provided by Desktop Integration and queues the task information in Desktop Integration queueing tables.
2. Microsoft Outlook Add-Ins checks the queue for new tasks, and when it finds task information, pulls the information from the queue and creates the tasks in Microsoft Outlook.
3. Microsoft Outlook Add-Ins checks for local changes to Services Procurement tasks and synchronizes those changes with the Desktop Integration queue tables.
4. The Desktop Integration framework calls the appropriate Services Procurement application class to update the appropriate work order logistical tasks.

Note. You can update task statuses in Microsoft Outlook or Services Procurement. The updates are synchronized in the respective systems.

Four types of work order tasks exist:

- Pre-Approval
- Post-Approval
- Off-Board
- Terminate

Only tasks that are defined with an execution type of Mandatory or Optional are sent to Outlook. Tasks that are defined with an execution type of Automatic are not sent to Outlook because they are carried out automatically in Services Procurement.

When a work order is created and saved, the Pre-Approval tasks are queued in the Desktop Integration queueing tables. When a work order is approved, the Post-Approval tasks are queued in the Desktop Integration queuing tables.

Terminate type tasks that are mandatory or optional are queued to Desktop Integration queueing tables when the user clicks the Terminate button and the work order status changes to Pending Terminate.

Off-Board type tasks that are mandatory or optional are queued in the Desktop Integration queuing table when the user clicks the Close or Cancel work order button.

Email Workflow

Once a task is completed in PeopleSoft Services Procurement, you cannot change the task status. In Outlook, after a task has been set to Completed status, the user can change the task status back to a status prior to Completion. If this happens, no changes are made in Services Procurement, but a notification is sent to the user informing that the task has already been carried out in Services Procurement. A new generic template is created to send the notification.

See Also

Chapter 18, "Managing Work Orders," Understanding the Work Order Process Flow, page 420

Chapter 18, "Managing Work Orders," Viewing Task Checklists, page 459

Prerequisites

Desktop Integration requires a secure connection for all communication with Microsoft Outlook, so make sure that the Secure Socket Layer (SSL) is configured and you can connect to the PeopleSoft system using an https:// URL.

See *PeopleTools PeopleBook: Security Administration*, "Employing LDAP Directory Services," Setting Up SSL in PeopleSoft Applications.

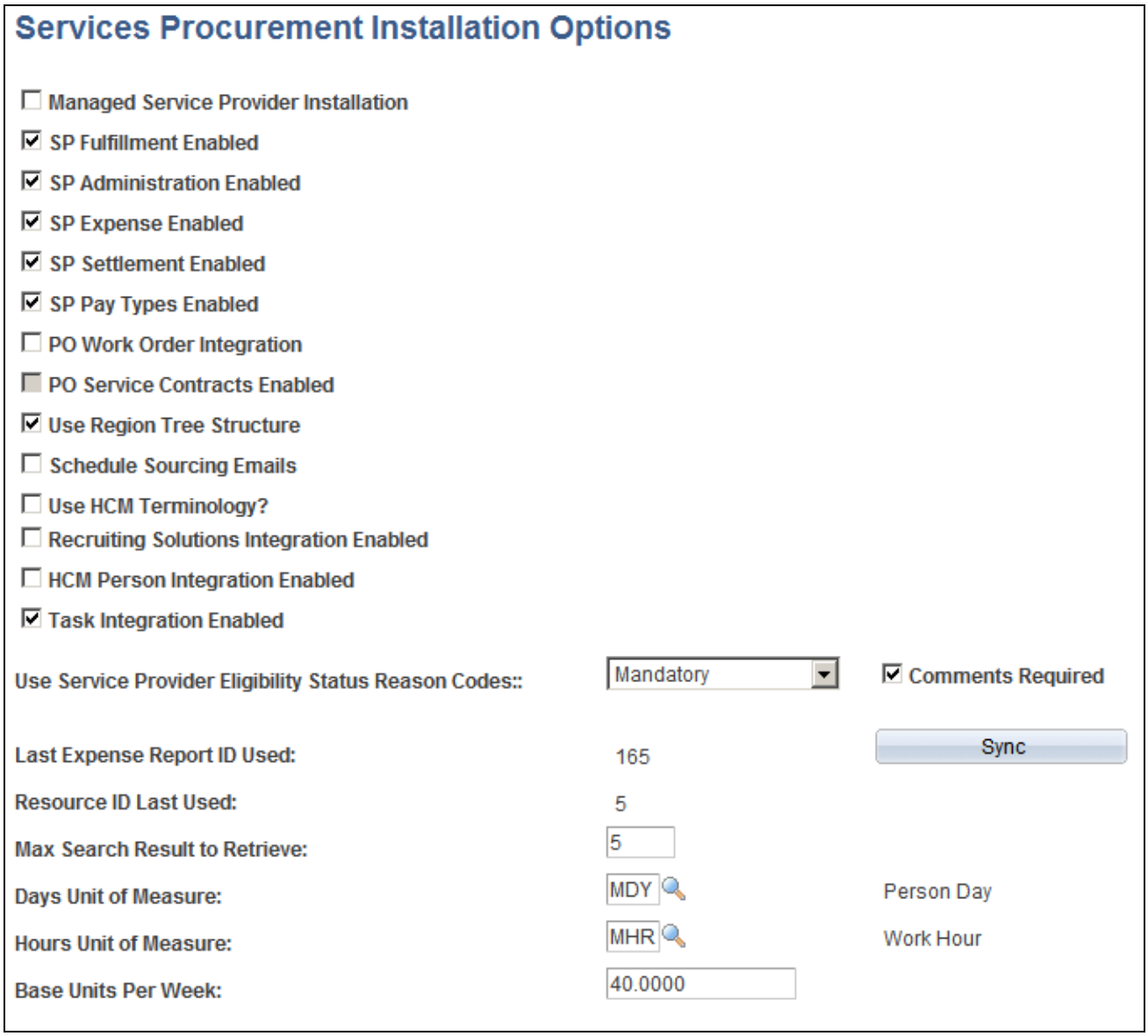
Pages Used to Set Up Integration for Work Order Logistical Tasks with Microsoft Outlook

Page Name	*Definition Name*	*Navigation*	*Usage*
Services Procurement Installation Options	Installation_SP	Services Procurement, General Setup, Installation Options	Enable task integration.
Desktop Integration - System Setup	EODI_SYSTEM_SETUP	Enterprise Components, Desktop Integration, System Setup	Assign a system ID.

Page Name	*Definition Name*	*Navigation*	*Usage*
Desktop Integration - Task Registration	EODI_TSK_REG	Enterprise Components, Desktop Integration, Task Registration	Register Services Procurement logistical tasks for Desktop Integration.
Permission Lists	ACL_MENU2	PeopleTools, Security, Permissions & Roles, Permission Lists Open the permission list for the Providers or Provider contacts, and select the Pages tab	Define permission lists.

Enabling Task Integration

Access the Services Procurement Installation Options page (Services Procurement, General Setup, Installation Options).

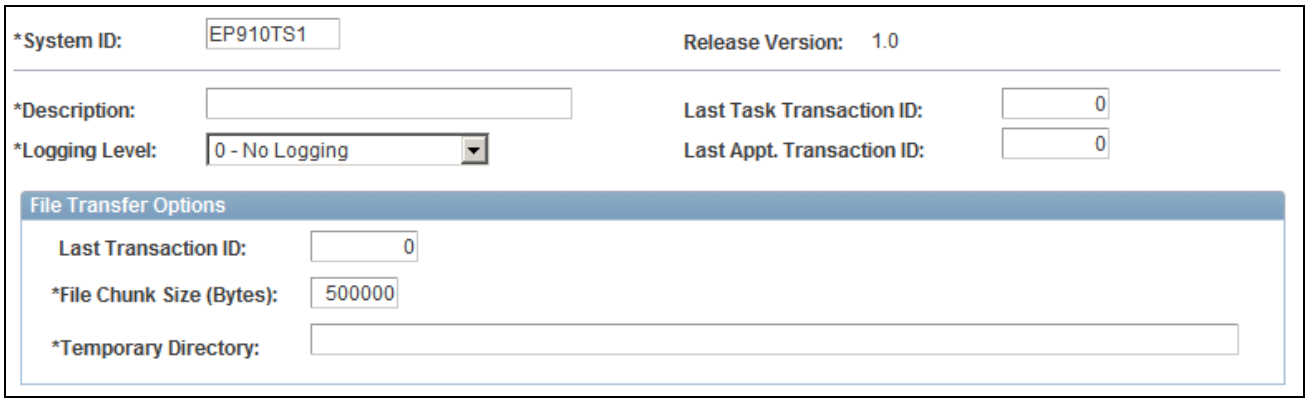


Services Procurement Installation Options page

Task Integration Enabled Select to enable Services Procurement to share work order tasks.

Assigning a System ID

Access the Desktop Integration - System ID page (Enterprise Components, Desktop Integration, System Setup).



Desktop Integration - System ID page

System ID Enter your system ID. This identifies the system to Microsoft Outlook so that it knows where to get work order tasks and send updates.

Registering Services Procurement Logistical Tasks for Desktop Integration

Access the Desktop Integration - Task Registration search page (Enterprise Components, Desktop Integration, Task Registration).

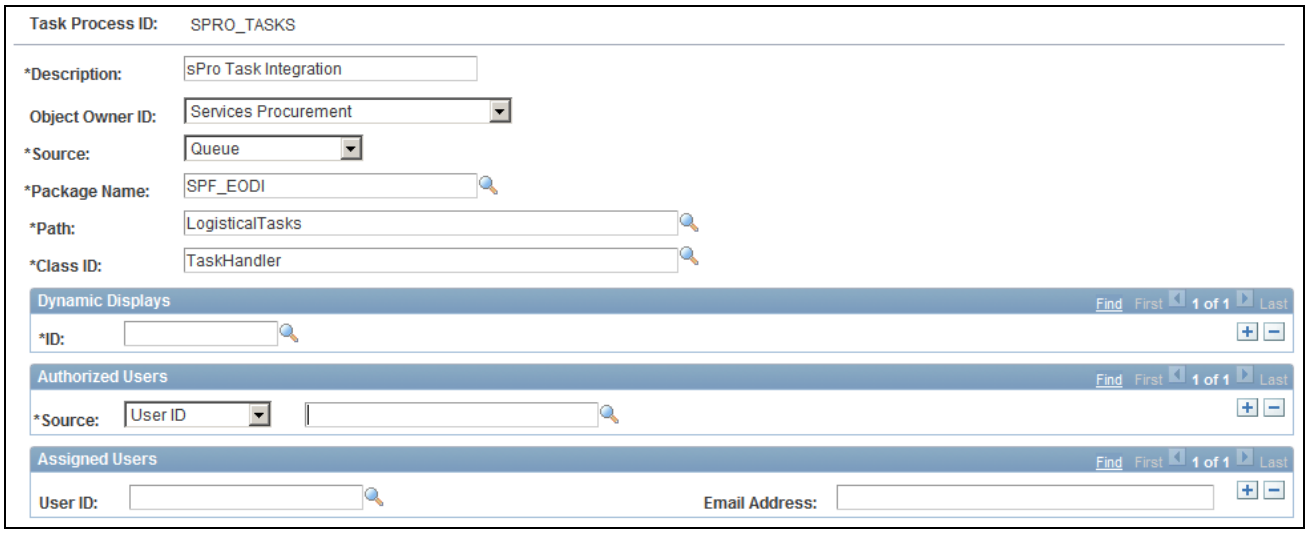
The process ID for task integration is SPRO_TASKS. If this process ID is not available, you need to create it.

To determine whether it is available:

1. On the Find an Existing Value tab of the Task Registration page, select *Task Process ID* in the Search by field.
2. Enter *SPRO_TASKS* in the begins with field.
3. Click Search.

If no values are found:

1. Select the Add a New Value tab.
2. Enter *SPRO_TASKS* in the Task Process ID field.
3. Click Add.



Desktop Integration - Task Registration

Use this page to provide information to Desktop Integration such as who the owner is and which application handler class to call when Microsoft Outlook sends information back to PeopleSoft Services Procurement.

Task Process ID SPRO_TASKS is the ID that identifies the Services Procurement task integration process.

Description Enter a description for the task registration, for example, *sPro Task Integration.*

Object Owner ID Select *Services Procurement.*

Source Select *Queue.*

Package Name Select *SPF_EODI.*

Path Select *LogisticalTasks.*

Class ID Select *TaskHandler.*

Dynamic Displays

Use this group box to specify things that are supplied by default to the task. Select the ID of the display that you want as the default.

See *PeopleSoft 9.1 PeopleBook: Integration Interfaces*, "Using Desktop Integration," Dynamic Displays.

Authorized Users

Authorize users for task integration for the task process ID SPRO_TASKS process ID. When the integration is activated, any of the users included in the definition will have their tasks integrated.

See *PeopleSoft 9.1 PeopleBook: Integration Interfaces*, "Using Desktop Integration," Authorized Users.

Assigned Users

Use this group box to specify users that are assigned by default when something is added to the queue for this registration. For the actual processing, the assigned user on the actual queue item is used.

See *PeopleSoft 9.1 PeopleBook: Integration Interfaces*, "Using Desktop Integration," Assigned Users.

Setting Up Microsoft Outlook to Share Work Order Tasks

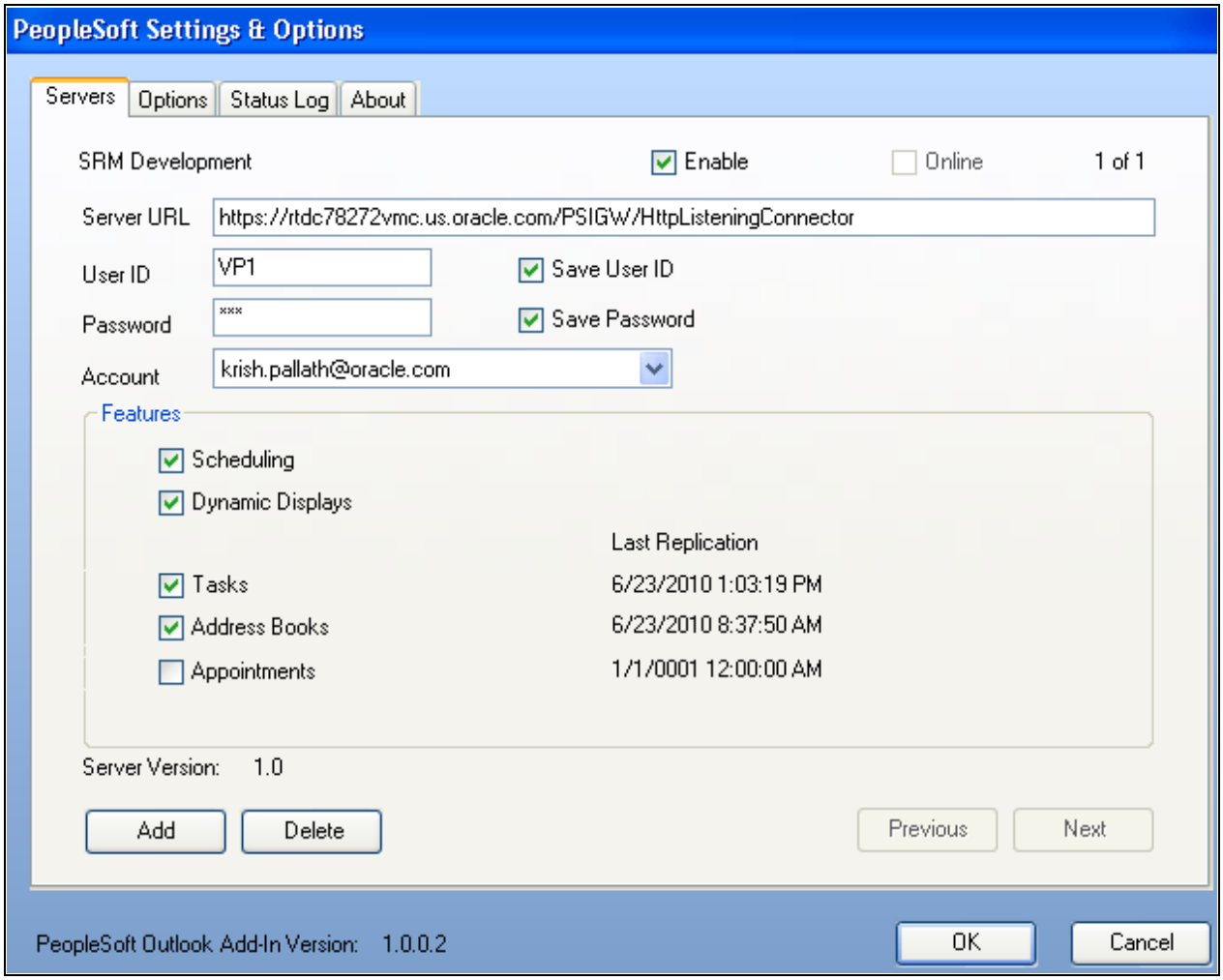
For PeopleSoft Services Procurement to share work order tasks with Microsoft Outlook, you need to install Microsoft Office Outlook 2007 or a later version.

Desktop Integration provides an Add-In for Outlook that enables applications to integrate with Microsoft Outlook. This Add-In needs to be installed and configured before you set up the Outlook client. When the Add-In is installed, a new menu named Peoplesoft is added to Outlook that has the PeopleSoft Settings & Options selection.

See *PeopleSoft 9.1 PeopleBook: Integration Interfaces*, "Using Desktop Integration," Understanding Desktop Integration.

To set up the Outlook client:

1. From the PeopleSoft menu in Outlook, select Settings & Options.



PeopleSoft Settings & Options page

2. Select the Enable check box to enable integration with PeopleSoft Services Procurement.
3. Enter the server URL.

   Microsoft Outlook requires a secure connection, so the URL should start with https.
4. Enter the user ID and password for connecting to the PeopleSoft system.
5. In the Account field, select the email account for Microsoft Outlook.
6. Select the Task check box to enable Outlook to share tasks with PeopleSoft Service Procurement.

When you complete the page and save it, Microsoft Outlook attempts to connect to the PeopleSoft system using the information provided. If Outlook can connect to the PeopleSoft system, the Online check box becomes selected, indicating that Outlook can communicate with the PeopleSoft system.

Defining Service Supplier Setup

To create suppliers, use the Vendor (VNDR_ID) component. Use the EM_VENDOR_CI component interface to load data into the tables for this component.

To view suppliers by service, use the Supplier By Service (SPB_SPLR_PROJROLE) component. To set up supplier sourcing, use the Supplier Sourcing (SPB_SUP_SRC_SETUP) component. To define services by supplier, use the Services by Supplier (SPB_PROJROLEBYSUPL) component.

To set up suppliers by service types, use the Suppliers by Service Types (SPB_SUPLBYROLETYPE) component. To define regions by supplier, use the Regions by Supplier (SPB_SPLR_REGION) component.

To define regions and service types by suppliers, use the Regions/Service Types by Supplier (SPB_SPLR_REGSER) component. To define suppliers by region, use the Suppliers by Region (SPB_REGION_SPLR) component. To set up suppliers by region and service type, use the Suppliers by Region/Service Type (SPB_REGSER_SPLR) component. To set up suppliers by region and service, use the Suppliers by Region/Service (SPB_REGROLE_SPLR) component. To set up services supplier information, use the Services Details (VENDOR_SPRO) component.

This section discusses how to:

- Build the region hierarchy using PeopleSoft Tree Manager.
- Enter supplier information.
- Maintain services supplier information.
- Maintain the supplier network.
- Maintain sourcing supplier setup.
- Set up suppliers by region.

Pages Used to Define Service Supplier Setup

Page Name	*Definition Name*	*Navigation*	*Usage*
Tree Definitions and Properties	PSTREEDEFN	• Tree Manager, Tree Manager • Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Tree Manager	Build the region tree hierarchy.

Page Name	*Definition Name*	*Navigation*	*Usage*
Region Codes	REGION_CD	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Service Region Code • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Regions/Ratesheets, Service Region Code	Define procurement region codes.
Identifying Information	VNDR_ID1_SUM	• Services Procurement, Define Services Procurement, Services Supplier Setup, Vendor Information • eProcurement, Buyer Center, Vendors, Maintain Vendors, Vendor Information	Maintain vendor information. See *PeopleSoft Source-to-Settle Common Information 9.1 PeopleBook*, "Maintaining Vendor Information."
Services Supplier Info	VENDOR_SPRO_PG	• Services Procurement, Define Services Procurement, Services Supplier Setup, Service Supplier Information • Services Procurement, Define Services Suppliers, Service Details	Maintain vendors as service suppliers.
Supplier Network Setup	SPB_SUP_NETWORK	• Services Procurement, Define Services Procurement, Services Supplier Setup, Supplier Network Setup • Services Procurement, Define Services Suppliers, Supplier Network Setup	Maintain a network of service suppliers for each business unit.

Page Name	*Definition Name*	*Navigation*	*Usage*
Supplier Sourcing Setup - Region	SPB_SPLR_REGION_PG	• Services Procurement, Define Services Procurement, Services Supplier Setup, Supplier Sourcing Setup • Services Procurement, Define Services Suppliers, Supplier Sourcing Setup	Maintain sourcing rules for suppliers by associating them with regions, service types and services.
Supplier Sourcing Setup - Service Type	SPB_ROLETYPEBYSUPL	Click the Service Type tab from the Supplier Sourcing Setup - Region page.	Associate resource suppliers with service types.
Supplier Sourcing Setup - Service Type by Region	SPB_SPLR_REGSER_P	Click the Service Type by Region tab from the Supplier Sourcing Setup - Region page.	Associate active resource suppliers with regions and service types, and associate regions and service types with a resource supplier.
Supplier Sourcing Setup - Service	SPB_PROJROLEBYSUPL	Click the Service tab from the Supplier Sourcing Setup - Region page.	Associate services with deliverables suppliers.
Supplier Sourcing Setup - Service by Region	SPB_SPLR_REGROL	Click the Service by Region tab from the Supplier Sourcing Setup - Region page.	Associate deliverables suppliers with regions and services.
Suppliers by Region	SPB_REGION_SPLR_PG	• Services Procurement, Define Services Procurement, Services Supplier Setup, Suppliers by Region • Services Procurement, Define Services Suppliers, Suppliers by Region.	Displays suppliers by region.
Suppliers by Service Type (for resource services)	SPB_SUPLBYROLETYPE	• Services Procurement, Define Services Procurement, Services Supplier Setup, Resource Service Setup, Suppliers by Service Type • Services Procurement, Define Services Suppliers, Suppliers by Service Type	Displays resource suppliers by service types.

Page Name	*Definition Name*	*Navigation*	*Usage*
Suppliers by Region/Service Type (for resource services)	SPB_REGSER_SPLR_PG	• Services Procurement, Define Services Procurement, Services Supplier Setup, Resource Service Setup, Suppliers by Region/Service Type • Services Procurement, Define Services Suppliers, Suppliers by Region/Service Type	Displays suppliers by regions and service types.
Suppliers by Service (for deliverable services)	SPB_SPLR_PROJROLE	• Services Procurement, Define Services Procurement, Services Supplier Setup, Deliverable Service Setup, Suppliers by Service • Services Procurement, Define Services Suppliers, Suppliers by Service	Displays suppliers by service.
Suppliers by Region/Service (for deliverable services)	SPB_REGROLE_SPLR	• Services Procurement, Define Services Procurement, Services Supplier Setup, Deliverable Service Setup, Suppliers by Region/Service • Services Procurement, Define Services Suppliers, Suppliers by Region/Service	Displays suppliers by region and service.

Building the Region Hierarchy

Use the region hierarchy tree structure to build the Supplier by Region and Rate Sheets by Region components graphically. This visual structure associates suppliers with procurement regions and enables you to determine the best suppliers for a given region. Expand the region nodes to view specific ship to locations (leafs) within the region.

The region tree is only used within Services Procurement if the Use Region Tree Structure check box is selected on the Services Procurement Installation Options page. If the check box is deselected, there is no parent child relationship defined between the different regions, only locations are assigned to the regions.

With the region hierarchy, you can also:

- Determine the best supplier to fill a requisition requirement.

- Create requisitions for specific regions (ship to locations) and source them to qualified suppliers in those regions.
- Source requisitions to suppliers that match region and rate sheet requirements.

To build the region hierarchy:

1. Access the Region Codes page and set up PeopleSoft Services Procurement region codes.
2. Access the Tree Manager page and set up the tree definition and properties.

   Select *REGION_TREE* as the structure ID, enter a description and setID, and select *Level Not Used* for the Use of Levels field.
3. Add a root node by selecting one of the available values.

See Also

Chapter 6, "Using Default Hierarchies," Defining the Region Hierarchy, page 214

Entering Supplier Information

Access the Identifying Information page (Services Procurement, Define Services Procurement, Services Supplier Setup, Vendor Information).

Note. Administrators can create, approve, and deactivate vendors. To enable administrator access, select all options on the Vendor Processing Authority page.

See Also

PeopleSoft Source-to-Settle Common Information 9.1 PeopleBook, "Maintaining Vendor Information"

Maintaining Services Supplier Information

Access the Services Supplier Info page (Services Procurement, Define Services Procurement, Services Supplier Setup, Services Supplier Information).

Supplier Type

Select *Resource,Deliverable,* or *Both.* The supplier type determines what type of requisitions the supplier can fill. If a supplier only provides hourly employees, select *Resource.* If a supplier only provides services that are paid in one total amount, select *Deliverable.* If the supplier can provide both types of services, select *Both.*

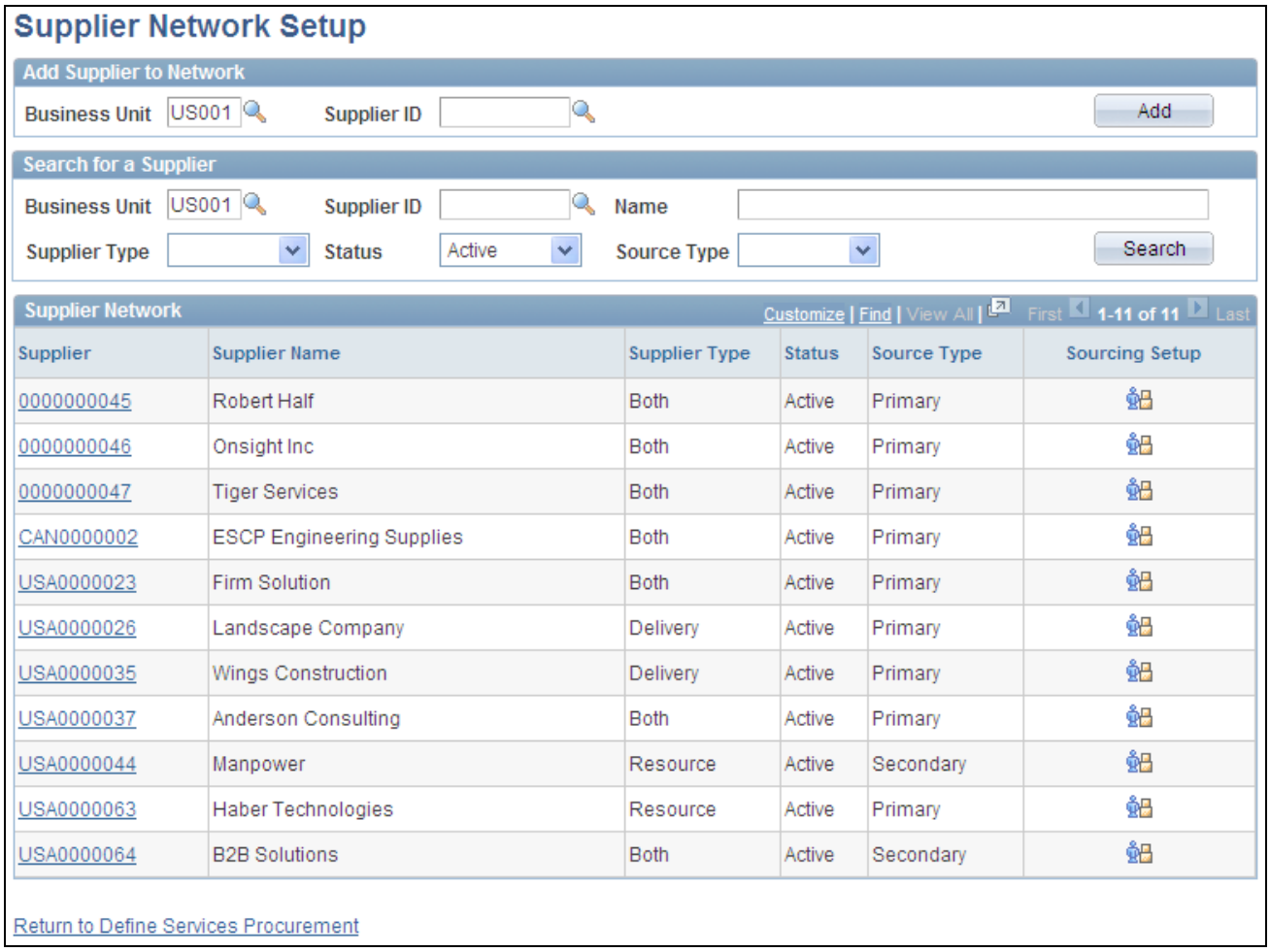
Multi Resource Supplier

Select to indicate that this supplier can be included for multi-resource transactions. These transactions support multiple, unique services and service providers in Services Procurement requisitions, sourcing, and work orders. You must select this check box to enable this supplier to be used use multiple resource services.

Internal Supplier	Select if the supplier is internal to your organization.
Include in Invoice Approval	Select if invoices should be routed to the supplier for approval before being routed internally for approval. If this option is selected after work orders have already been opened for the supplier, then the Supplier Invoice Approver name on these work orders will be missing. Therefore, the system issues a warning whenever this option is selected to remind the user to review all open work orders for this supplier and to assign a supplier invoice approver. If the Supplier Invoice Approver is missing on any work orders, invoicing will bypass submitting the invoice to suppliers for approval even though this option is selected to Include in Invoice Approval.
Ethnicity	If the vendor is minority owned, select the ethnicity of the owner.
Score	Displays the supplier score as determined from data analysis.

Maintaining the Supplier Network Setup

Access the Supplier Network Setup page (Services Procurement, Define Services Procurement, Services Supplier Setup, Supplier Network Setup).



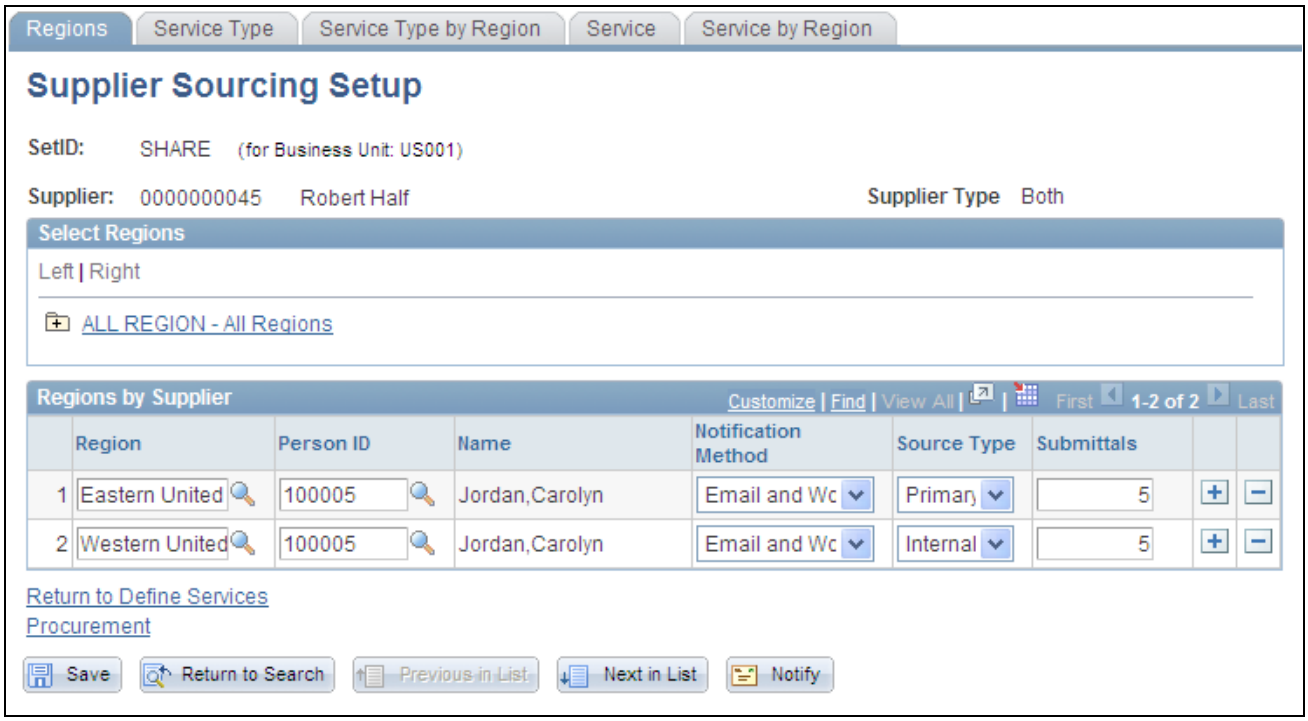
Supplier Network Setup page

Click to access the Supplier Sourcing Setup component, where you can organize service suppliers by business unit, region, service type, and service.

Note. When a supplier is both a resource- and deliverable-type supplier and the supplier is a multiple-resource supplier, multi-resource types are included in the list of values for the Service Type field.

Maintaining Supplier Sourcing Setup

Access the Supplier Sourcing Setup page (Services Procurement, Define Services Procurement, Services Supplier Setup, Supplier Sourcing Setup).



Supplier Sourcing Setup page

Use the Supplier Sourcing Setup component to add suppliers to the supplier network in one central location. Use this component to organize service supplier information by business unit, region, service type, service type by region, service, and service by region.

If a supplier is deliverable-based and also a multi-resource services supplier, all five tabs appear for the supplier, but only the multi-resource service types are selectable from the service type prompt.

Setting Up Suppliers by Region

Access the Suppliers by Region page (Services Procurement, Define Services Procurement, Services Supplier Setup, Suppliers by Region).

Suppliers by Region page

Note. If the region tree structure is enabled, use the region hierarchy tree structure to build the supplier and region associations graphically.

Defining Sourcing Setup

To set up bid factors, use the Bid Factor Setup (BID_FACTOR_COMP) component. To create bid factor groups, use the Bid Factor Group Setup (BID_FCTR_GRP_COMP) component.

To set up services procurement pay types, use the Services Procurement Pay Types (SPB_PAY_TYPES) component. To set up bid factors mapping, use the Bid Factor Mapping (SPF_BIDFCTR_MAP) component. To set up bid factors by category, use the Bid Factor by Category (SP_BDFTR_CAT_COMP) component.

To define autosourcing parameters, use the Autosource (SPF_AUTOSOURCE) component. To define markups by service type, use the Markups by Service Types (SPB_SRVC_MRKUP) component. To maintain markups by region, use the Markup by Region (SPB_RGN_MRKUP) component.

This section provides an overview of the bid factor processes and discusses how to:

- Create bid factors.
- Map bid factors.
- Define bid factors by item category.
- Set up services procurement pay types.
- Enter markups by service type.
- Enter markups by region.

Understanding Bid Factors

With PeopleSoft Services Procurement bid factors, you can:

- Define bid factor rules that help select qualified bids.
- Effectively manage a vast number of bid submittals for a requisition.
- Speed up the submittal process by calculating the best and worst bid scores.
- View bid factor scores across a bid pool.

Bid Factors and Requisitions

PeopleSoft Services Procurement makes it possible for bid factors to appear by default on the requisition. This ensures that bid factors relevant to the requisition automatically appear on the requisition. Bid factors can be added instantly while creating the requisition and can be edited before sourcing the requisition. Setting up the standard bid factors helps alleviate the work during requisition creation and sourcing.

Bid factors appear by default from several setup pages:

- Bid Factor Mapping: Enables the user to define which bid factors should appear on deliverables-based requisitions and which should appear on resource-based requisitions.

  A bid factor can appear on both resource and deliverable requisitions.

- Bid Factors by Category: You can add bid factors to item categories. The item category links to the service type on the requisition.

  When you select the service type on the requisition, the bid factors matching that service type appear by default onto the Bid Factors by Requisition page.

- Bid Factor by Service: You can link bid factors to services and project roles.

  When you select the services and project role on the requisitions, the bid factors linked to that services and project role appear by default on the Bid Factors by Requisition page.

- Bid Factors by Activity: You can link bid factors to deliverable activities.

  When a service is selected on a deliverables requisition, the bid factors linked to the activities by service appear by default on the Bid Factors by Requisition page.

Note. If the same bid factor is defined in multiple defaulting pages, the system deletes the duplicates so that a bid factor only appears once on the Bid Factors by Requisition page.

See Also

Chapter 14, "Creating and Managing Services Procurement Requisitions," page 285

Pages Used to Define Sourcing Setup

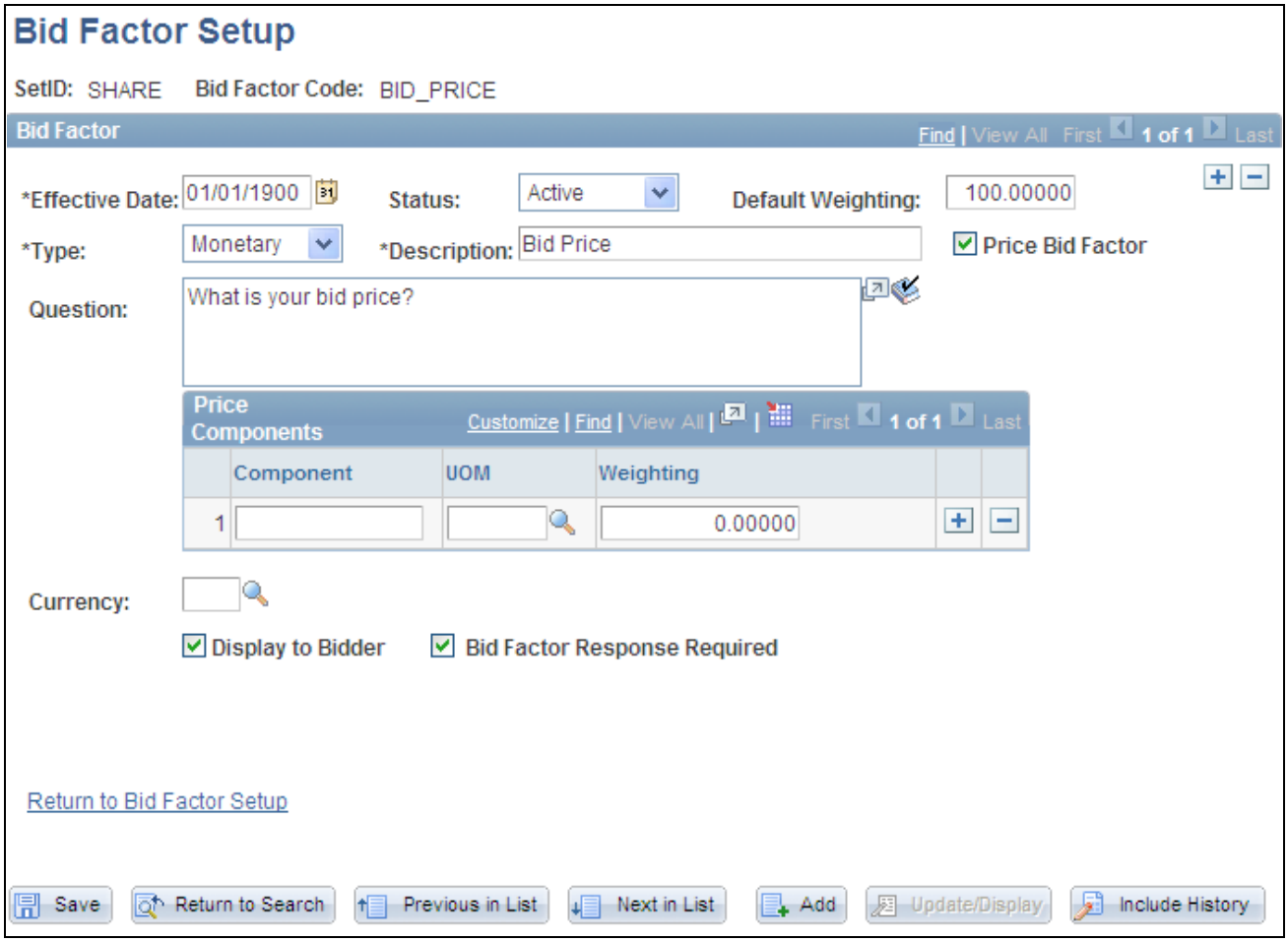
Page Name	*Definition Name*	*Navigation*	*Usage*
Automatic Sourcing	SPF_AUTOSOURCE	• Services Procurement, Define Services Procurement, Sourcing Setup, Automatic Sourcing • Set Up Financials/Supply Chain, Product Related, Services Procurement, Workflow, Automatic Sourcing	Define rules to automatically source upon requisition approval.
Bid Factor Setup	BID_FACTOR_PNL	• Services Procurement, Define Services Procurement, Sourcing Setup, Bid Factor Setup, Bid Factor Setup • Sourcing, Create Events, Bid Factor Setup	Create bid factors.
Assign Business Units and Departments to Bid Factor	BID_FCTR_BUDEPT	Click the Assign BUs and Departments link on the Bid Factor Setup page.	Assign business units and departments to bid factors.
Assign Defaulting Rules to Bid Factor	BID_FACTOR_LINE	Click the Assign Defaulting Rules link on the Bid Factor Setup page.	Assign defaulting rules to bid factors.
Assign Response Query to Bid Factor	BID_FCTR_QRY	Click the Assign Response Query link on the Bid Factor Setup page.	Associate response query to bid factors.
Assign Contract Clauses	BID_FCTR_CLAUSE	Click the Assign Clauses link on the Bid Factor Setup page.	Assign contract clauses to bid factors.
Assign Contract Agreements	BID_FCTR_AGRMNT	Click the Assign Agreements link on the Bid Factor Setup page.	Assign contract agreements.

Page Name	*Definition Name*	*Navigation*	*Usage*
Bid Factor Group	BID_FACTOR_GRP	• Services Procurement, Define Services Procurement, Sourcing Setup, Bid Factor Setup, Bid Factor Group Setup • Sourcing, Create Events, Bid Factor Group Setup	Group bid factors.
Bid Factor Mapping	SPF_BIDFCTR_MAP_PG	• Services Procurement, Define Services Procurement, Sourcing Setup, Bid Factor Setup, Bid Factor Mapping • Set Up Financials/Supply Chain, Product Related, Services Procurement, Bid Factors, Bid Factor Mapping	Map predefined attributes to bid factors in the strategic sourcing module.
Bid Factors by Category	SP_BDFTR_BY_CAT_PG	• Services Procurement, Define Services Procurement, Sourcing Setup, Bid Factor Setup, Bid Factors by Category • Set Up Financials/Supply Chain, Product Related, Services Procurement, Bid Factors, Bid Factors by Category	Associate bid factors by category.
Services Procurement Pay Types	SPB_PAY_TYPES	• Services Procurement, Define Services Procurement, Sourcing Setup, Pay Types and Markups Setup, Services Pay Types • Set Up Financials/Supply Chain, Product Related, Services Procurement, Pay Types, Services Pay Types	Maintain descriptive labels for each pay type.

Page Name	*Definition Name*	*Navigation*	*Usage*
Markup Details	SPB_SRVC_MRKUP	• Services Procurement, Define Services Procurement, Sourcing Setup, Pay Types and Markups Setup, Markups by Service Type • Set Up Financials/Supply Chain, Product Related, Services Procurement, Pay Types, Markups by Service Type	Maintain vendor markup information by service type.
Maintain Markups by Region	SPB_RGN_MRKUP	• Services Procurement, Define Services Procurement, Sourcing Setup, Pay Types and Markups Setup, Markups by Region • Set Up Financials/Supply Chain, Product Related, Services Procurement, Pay Types, Markups by Region	Maintain vendor markup information by region.
Performance Level Codes	SPB_LVL_CD	• Services Procurement, Define Services Procurement, Sourcing Setup, Supplier Scoring Setup, Performance Level Codes • Services Procurement, Define Service Suppliers, Performance Level Codes	Maintain performance level codes for a supplier. See Chapter 25, "Supplier Scoring for PeopleSoft Services Procurement," Setting Up Performance Level Codes, page 644.
Supplier Scoring Rules	SPB_SUP_SCORE_RULE	• Services Procurement, Define Services Procurement, Sourcing Setup, Supplier Scoring Setup, Scoring Rules • Services Procurement, Define Service Suppliers, Scoring Rules	Maintain supplier scoring rules. See Chapter 25, "Supplier Scoring for PeopleSoft Services Procurement," Setting Up Supplier Scoring Rules, page 646.

Creating Bid Factors

Access the Bid Factor Setup page (Services Procurement, Define Services Procurement, Sourcing Setup, Bid Factor Setup, Bid Factor Setup).



Bid Factor Setup page

Default Weighting Assign an ideal default weighting for the bid factor question that you create.

Type

Select the bid factor type. The bid factor type determines the bid factor questions. Values are:

- *Date*
- *List*
- *Monetary*
- *Numeric*
- *Separator*
- *Text*
- *Yes/No*

Additional fields appear, depending on the bid type selection.

Note. The separator bid factor type is used to organize long lists of bid factors by creating headings.

Question

Enter the text of the bid factor question.

Best and **Worst**

Enter the best and worst possible scores that a supplier can bid for a particular question. For example, if you create a new bid factor with type *Date,* and the Question field contains *What is the end date?* the Best and Worst fields represent the best and worst dates on which the candidate can complete the job.

Assign BUs and Departments

Click to access the Assign Business Units and Departments to Bid Factor page, where you can assign business units and departments to bid factors.

Assign Defaulting Rules

Click to access the Assign Defaulting Rules to Bid Factor page, where you can assign default rules to bid factors.

Assign Response Query

Click to access the Assign Response Query to Bid Factor page, where you can assign a response query to bid factors.

Assign Clauses

Click to access the Assign Contract Clauses page, where you can assign contract clauses to bid factors.

Assign Agreements

Click to access the Assign Contract Agreements page, where you can assign contract agreement to bid factors.

Cost Contributions

Use this section to define factor cost contributions based on bid price, bid quantity, cost range, and fixed cost. You can also define cost contributions based on user-defined parameters.

Mapping Bid Factors

Access the Bid Factor Mapping page (Services Procurement, Define Services Procurement, Sourcing Setup, Bid Factor Setup, Bid Factor Mapping).

Predefined PeopleSoft Services Procurement bid factors appear when you create a service requisition. For example, if you have a bid factor of *EXPERIENCE* mapped to the PeopleSoft Services Procurement attribute *Experience*, the experience on the requisition is compared to that of the candidate.

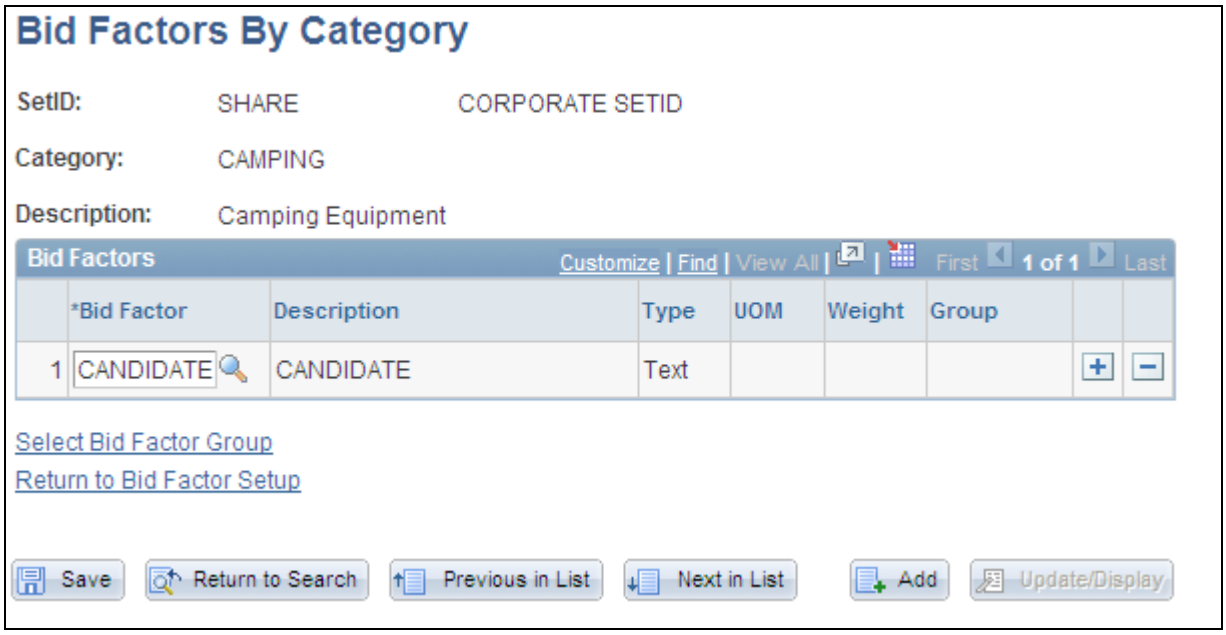
Bid factor attributes appear by default on the Requisition - Bid Factor by Requisitions Lines page.

Bid Factor Code	Enter the bid factor code that maps to the specified services procurement attribute.
Status	Displays the status of the bid factor mapping.
Comment Text	Displays the question related to the bid factor code.
Resource Service type BF (resource service type bid factor)	Select this check box if the bid factor is related to resource-based requisitions. **Note.** The RATE and CANDIDATE bid factor mappings only occur on resource-based requisitions, and therefore, only have the Resource Service type BF check box selected.
Deliverable service type BF (deliverable service type bid factor)	Select if the bid factor is related to deliverables-based requisitions. The *AMOUNT* bid factor mappings only occurs on deliverables-based requisitions, and therefore, only have the Deliverable service type BF check box selected.

Note. Use ad hoc bid factors to create unique bid factor values that appear by default in requisitions.

Defining Bid Factors by Item Category

Access the Bid Factors by Category page (Services Procurement, Define Services Procurement, Sourcing Setup, Bid Factor Setup, Bid Factors by Category).



Bid Factor by Category page

Link bid factors to a specific item category. You can link bid factors to a category for both deliverable- and resource-based services. When a requisition is created for a service type, it looks for any bid factors linked to the item category for that service type. If it finds any bid factors, it lists them on the Bid Factors by Requisition Line page.

Setting Up Services Procurement Pay Types

Access the Services Procurement Pay Types page (Services Procurement, Define Services Procurement, Sourcing Setup, Pay Types and Markups Setup, Services Pay Types).

You can enter labels for each pay type field. The system provides values as a default, which you can override. The pay types are linked to the time reporting codes. The system uses these pay types and multipliers to calculate the rate on the invoice. The total rate is calculated as the total sum of all individual pay types.

Note. This component is only accessible if SP Pay Types Enabled is selected on the Services Procurement Installation Options page.

Entering Markups by Service Type

Access the Markup Details page (Services Procurement, Define Services Procurement, Sourcing Setup, Pay Types and Markups Setup, Markups by Service Type).

When you define markups by service type, you can set limits on the vendor markups for particular service types. You can define the maximum markup as an amount or as a percentage. When the vendor bids on a requisition, the system verifies to whether the vendor markups exceed the maximum amounts defined. The system first checks for a markup on the service type and if it doesn't find one, it looks for a markup on the region. If it doesn't find one on the region, no validation is to be done on the vendor markups.

Max Vendor Markup (maximum vendor markup) Enter the maximum vendor markup rate as percentage or as total amount.

Max Total Markup (maximum total markup) Enter the maximum vendor tolerance rate in percentage.

Note. This component is only accessible if SP Pay Types Enabled is selected on the Services Procurement Installation Options page.

Entering Markups by Region

Access the Maintain Markups by Region page (Services Procurement, Define Services Procurement, Sourcing Setup, Pay Types and Markups Setup, Markups by Region).

When you define markups by region, you can set limits on the vendor markups for a particular region. You can define the maximum markup as an amount or as a percentage. When the vendor bids on a requisition, the system verifies whether the vendor markups exceed the maximum amounts defined. The system first checks for a markup on the service type and if it doesn't find one, it looks for a markup on the region. If it doesn't find one on the region, no validation is to be done on the vendor markups.

Max Vendor Markup (maximum vendor markup) Enter maximum vendor markup rate as percentage or as total amount.

Max Total Markup (maximum total markup) Enter maximum vendor tolerance rate in percentage.

Note. This component is only accessible if SP Pay Types Enabled is selected on the Services Procurement Installation Options page.

Maintaining Users and Team Setup

To set up requesters, use the Requester Setup (REQUESTOR_TBL) component. Use the REQUESTOR_TBL_CI to load data into tables for this component.

To set up user preferences, use the User Preferences (PV_OPR_DEFAULT) component.

This section providers an overview of users and team setup, and discusses how to:

- Set up roles for role actions.
- Set up user profiles.
- Set up user preferences.
- Set up service requester defaults.
- Set up service coordinator defaults.
- Create and edit requesters.

- Create and edit service coordinators.
- Create and edit service provider contacts.
- Create and edit service providers.
- Set up service provider identifiers.
- Maintain service provider information.
- Search for ineligible service providers.
- Create and edit combined service provider/coordinator roles.
- Revoke service provider/coordinator roles.
- Replace service coordinators.
- Replace VMS service coordinators.
- View the Coordinator Replacement log.
- Create and edit service administrators.
- Create and edit approvers.
- Create service coordinator teams.

Understanding Users and Team Setup

This section provides overviews of the users and team setup, and discusses:

- User roles.
- Requesters.
- Service coordinators.
- Service provider/coordinators.
- Provider contacts.
- Service providers.
- Independent providers.

Understanding User Roles

The user role information determines whether the user is an enterprise user or a supplier user.

Here are some examples of enterprise users:

- Requester.
- Service coordinator (employee).
- Approver.

- Services procurement analyst.
- Administrator.
- Invoice manager.

Here are some examples of supplier users:

- Service provider.
- Provider contact.
- Service coordinator (non-employee).
- Independent provider.

Register new requesters, service coordinators, provider contacts, administrators, approvers, independent providers, and service providers. Associate them with appropriate user roles to define which pages they use when entering the procurement environment. Users are only authorized to view pages that are associated with their specified user role type.

Note. An individual user may be associated with one or more of these roles.

The system uses autonumbering to generate unique person IDs while registering a service coordinator, service provider contact, and service provider. The system uses the number type PeopleSoft Services Procurement person ID to generate the person ID automatically.

Warning! The user default setID is the setID for the PeopleSoft Services Procurement person ID. If the default setID is not obtained for the user creating the person ID, the setID from the autonumbering table becomes the setID for the PeopleSoft Services Procurement person ID.

Note. You can attach the number type for the PeopleSoft Services Procurement person ID to any person ID. Be sure to specify a different starting sequence for every setID with a maximum length of three.

Requesters

The Department SetID, ShipTo SetID, Location SetID, and PO Origin SetID fields work together when you establish department, ship to, location, and origin default information for a requester. After you select a setID for each of the defaults, you can select only the defaults associated with that setID.

A requester can create and manage service projects and service activities, create and manage service requisitions, view service sourcing information, view bid and response information, view work orders, and approve time and expense sheets.

Service Coordinators

A service coordinator is an employee or non-employee who is responsible for sourcing and filling a requisition. The service coordinator can view service requisitions and lines, source requisitions, communicate with suppliers, view bid and response information and, depending on their defaults, create and manage work orders.

Provider Contacts

A service provider contact is a supplier who can manage a service provider roster, view service requisitions, submit bids, communicate with service coordinators, view bid and response information, enter progress logs, and view timesheets and expenses.

Note. You must register the service provider contact before you can set up a provider contact user profile or register a related service provider. However, when you register a service provider as an independent provider, you do not need to register the service provider contact first.

Service Providers

A service provider is a person who can record and view time and expense information. Service providers are those supplier users that perform the needed service. Using PeopleSoft Services Procurement, you can manage and monitor the eligibility status of service providers for new assignments. For example, if a new provider has not yet completed the necessary background checks or a previously used provider has performed poorly on an assignment, then the enterprise can prevent the selection of that service provider for new assignments. The system uses global information that you define, such as social security numbers, passport numbers, and tax ID numbers, to determine specific identification for suppliers.

Service Providers/Coordinators

A service provider/coordinator can source and bid for service providers and also perform the duties of a service coordinator (recruiter).

Note that:

- A service provider/coordinator cannot source a requisition to herself on the Sourcing Selection page.
- A service provider/coordinator cannot submit himself as a candidate (service provider) on the Submit Bid page for a requisition that he sourced.
- A service provider/coordinator cannot act on a bid on the Supplier Bid Response page if she submitted the bid or if she is the service provider on the bid.
- On a manual work order, a service coordinator cannot be the same as the service provider, and a service coordinator cannot access work orders for which he is the service provider or service provider/coordinator.

Important! Only *existing service providers* can be switched to this combined role.

Independent Providers

The Independent Provider check box on the Register Service Provider page determines whether the service provider is an independent provider. Select the check box to identify the service provider as an independent provider who is both the provider contact and a service provider.

Note. You must register the service provider user before you can set up a service provider user profile.

An independent provider is a person who acts as both the provider contact and the service provider. An independent provider can record and view time and expense information, manage a consultant roster, view service requisitions, submit bids, communicate with service coordinators, and view bid and response information.

An independent provider has only one person ID and one user profile. An independent provider is assigned both the SP_PROVIDER_CONTACT and the SP_PROVIDER roles, or roles that provide functionality for both service provider and provider contact. You can also attach a resume for a service provider.

Common Elements Used in this Section

Return to Define Services Procurement Click this page to return to the Define Services Procurement home page.

Return to Services User Setup Click this page to return to the Services User Setup page.

Pages Used to Maintain Users and Team Setup

Page Name	*Definition Name*	*Navigation*	*Usage*
User Profiles	SPB_USRPRFL_PG_SEC	• Services Procurement, Maintain Users, Services User Setup On the Services User Setup (page 1), select Edit an existing Services User option in #1, select any type in step #2, and enter a person ID in #3, and then click the Update User Profile link (#7). • Services Procurement, Define Services Procurement, Services User Setup On the Services User Setup (page 1), select Edit an existing Services User option in #1, select any type in step #2, enter a person ID in #3, and then click the Update User Profile link (#7).	Update the user profile for this services user.

Page Name	*Definition Name*	*Navigation*	*Usage*
User Profile Information	SPB_USR_PROFILE_PG	• Services Procurement, Define Services Procurement, Services User Setup On the Services User Setup (page 1), select Create a new Services User option in #1, select any type in step #2, and then click the Next button. Click No in step #3, and then click the User Profile link that appears in step #4. • Services Procurement, Maintain Users, Services User Setup On the Services User Setup (page 1), select Create a new Services User option in #1, select any type in step #2, and then click the Next button. Click No in step #3, and then click the User Profile link that appears in step #4.	Update user profile information.
eProcurement Role Actions	PV_ACTIONS	• Services Procurement, Define Services Procurement, User and Team Setup, Role Actions • Services Procurement, Maintain Users, Role Actions	Assign user roles to delivered role actions.
Role Action for User Setup	SPB_USRSTP_ROLE_PG	• Services Procurement, Define Services Procurement, User and Team Setup, Role Action for User Setup • Services Procurement, Maintain Users, Role Actions for User Setup	Assign roles to predefined role actions to be used when creating a new user.

Page Name	*Definition Name*	*Navigation*	*Usage*
User Preferences	PV_OPR_LINKS	• Services Procurement, Maintain Users, Maintain User Preferences • On the Service User Setup (page 1), choose any existing user in step #1, select any type in step #2, and enter person ID in step #3, and then click the User Preferences link in step #5.	Enter overall and procurement preferences.
Overall Preferences	OPR_DEF_TABLE_FS1	Click the Overall Preferences link on the Users Preferences page.	Capture the default business unit and default setID for the requester, and add all other users.
Requester Defaults	SPB_REQ_USR_DEF_PG	• Services Procurement, Maintain Users, Service Requester Defaults • On Service User Setup (page 1) select the 'existing' option in step #1 and in step #2, select Requester, and click the Requester Default link.	Set up preferences for requesters.
Service Coordinator Defaults	SPB_SRVC_USRDEF_PG	• Services Procurement, Maintain Users, Service Coordinator Defaults • On Service User Setup (page 1) select the 'existing' option in step #1, and select Service Coordinator in step #2, and then click the Service Coordinator Defaults link.	Set up preferences for service coordinators.
Services User Setup (page 1)	SPB_USER_SETUP_PG1	• Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup • Services Procurement, Maintain Users, Services User Setup	Register requesters, service coordinators, service providers, service provider contacts, service administrators, and approvers.

Page Name	*Definition Name*	*Navigation*	*Usage*
Services User Setup (page 2)	SPB_USER_SETUP_PG2	Click the Create a New Services User button, and then click the requester, service coordinators, service providers, service provider contacts, service administrator, or approver option to add a new user.	Determine whether the new user has an existing user profile or needs a new profile, add new users as requesters, and establish security and user preferences for the new user.
User Profile Information	PB_USR_PROFILE_PG	Click the User Profile link on the Services User Setup (page 2).	Enter user ID and password information for the new requester.
Requester Setup	REQUESTOR_TBL	• Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup Click the Add button on the Services User Setup page to add the new user as a requester or click the Edit Requester link to edit an existing requester. • Services Procurement, Maintain Users, Requester Setup	Define requisition and catalog defaults for the requester.
Business Unit Security by User ID	SEC_BU_OPR	Click the Unit by User ID link on the Services User Setup page.	Set up business unit access by user ID.
TableSet Security by User ID	SEC_SETID_OPR	Click the TableSet by User ID link on the Services User Setup page.	Set up TableSet access by user ID.
Maintain Service Coordinator	SPB_PERSON_PAGE	• Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup Click the Add button to add a new Person ID or click the Edit Service Coordinator link to edit an existing service coordinator Person ID. • Services Procurement, Maintain Users, Service Coordinator	Define personal information for the service coordinator

Page Name	*Definition Name*	*Navigation*	*Usage*
Maintain Service Coordinator - Service Coordinator Information	SPB_COORDINATOR_PG	Click the Service Coordinator Information link on the Maintain Service Coordinator page.	Define employee and user ID information.
Maintain Service Coordinator - Phone and Email Details	SPB_USR_PH_EM_PAGE	Click the Phone and Email Details link on the Maintain Service Coordinator page.	Enter telephone and email details for the service coordinator.
User Login Information - User Profile Information	SPB_PERSLGN_SEC_PG	Click the Create User Profile button on the Service Coordinator Information page.	Define login information for the service coordinator.
Maintain Provider Contact	SPB_SP_PERS_PAGE	• Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup Click the Add button to add a new Person ID or click the Edit Service Provider Contact link to edit an existing service provider contact for the selected Person ID. • Services Procurement, Maintain Users, Provider Contact	Define personal information for the provider contact.
Maintain Provider Contact - Provider Contact Information	SPB_PROV_CNTCT_PG	Click the Provider Contact Information link on the Maintain Provider Contact page.	Define supplier, location code, and create user profile.
Maintain Provider Contact - Phone and Email Details	SPB_USR_PH_EM_PG2	Click the Phone and Email Details link on the Maintain Provider Contact page.	Enter telephone and email details for the provider contact.

Page Name	*Definition Name*	*Navigation*	*Usage*
Replace Service Coordinator	SPB_REPLACE_SC	• Services Procurement, Maintain User, Replace Coordinator • Services Procurement, Define Services Procurement, User and Team Setup, Replace Coordinator • Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup Select a person ID in step #3, and then click the Edit Service Provider link in step #4. Change the Person Type to *Service Provider/Coordinator* and then click the Save button. Click the Replace Service Coordinator link.	Use this page to replace the service coordinator. This page is used for non-VMS service coordinators.
Multi Resource Service Information	SPB_REPL_REQ_MRSC	Click the Positions link in the Requisition Details grid on the Replace Service Coordinator page.	View requisition details including the requisition ID, service, service type, and positions for each service.
Multi Resource Service Information	SPB_REPL_WO_MRSC	Click the Positions link in the Work Order grid on the Replace Service Coordinator page.	View work order details including the work order ID, service, service type, and positions for each service.
Replace VMS Service Coordinator	SPB_REPL_VMS_SC	• Services Procurement, Maintain Users, Replace VMS Coordinator • Services Procurement, Define Services Procurement, User and Team Setup, Replace VMS Coordinator	Use this page to replace VMS service coordinators. This page is used to replace VMS service coordinators.

Page Name	*Definition Name*	*Navigation*	*Usage*
Service Coordinator Replacement Log	SPB_REPLASC_LOG	• Services Procurement, Maintain Users, Coordinator Replacement Log • Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup, Coordinator Replacement Log	View requisitions and work orders on which the service coordinator replaced.
Maintain Service Provider	SPB_PERS_PROV_PAGE	• Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup Click the Add button to add a new Person ID or click the Edit Service Provider link to edit an existing service provider for the selected Person ID. • Services Procurement, Maintain Users, Service Provider	Maintain service provider information, including personal information for the provider.
Eligibility Status Confirmation	SP_REASONCD_DTL	Select or deselect the Eligible check box on the Maintain Service Provider page.	Provide a reason code for making the eligibility status change if the installation options have been defined to use reason codes. In addition, if the installation options have been defined to require comments, you must enter comments for the change.
Maintain Service Provider - Service Provider Information	SPB_PROVIDER_PG	Click the Service Provider Information link on the Maintain Service Provider page.	Maintain service provider information. This includes defining work status, project role, supplier, years of experience, and other parameters to define the service provider. **Note.** If you are maintaining an independent service supplier, a similar page is used, but a provider contact is not required.

Page Name	*Definition Name*	*Navigation*	*Usage*
Maintain Service Provider - Service Provider Information	SPB_INDP_PROVIDER_PG	Click the Service Provider Information link on the Maintain Service Provider page.	Maintain independent service provider information. **Note.** This page is similar to the Maintain Service Provider - Service Provider Information page except independent providers do not have provider contacts.
Maintain Service Provider - Phone and Email Details	SPB_USR_PH_EM_PG3	Click the Phone and Email Details link on the Service Provider Information page.	Enter telephone and email details for the service provider.
Service Provider Skills	SPB_PROV_SKILL_PG	Click the Provider Skills link on the Service Provider Information page.	Select appropriate competencies for the service provider.
Service Provider Identifiers	SPB_PRV_ID	Services Procurement, Define Services Procurement, User and Team Setup, Service Provider Identifiers	Set up service provider identifiers. Identifiers are types of identifications that uniquely identify people, such as a social security number.
Service Provider Eligibility Review	SPB_SPELGBLTY_SRCH	Services Procurement, Define Services Procurement, User and Team Setup, Provider Eligibility Search	Search for ineligible service providers. This is a Verity search.
Service Team	SPB_TEAM	• Services Procurement, Define Services Procurement, User and Team Setup, Service Team • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Teams, Service Team	Create service coordinator teams that can source and bid on each other's requisitions and edit each other's work orders.

Page Name	*Definition Name*	*Navigation*	*Usage*
Teams by Region/Service Type	SPB_TEAM_STREG	• Services Procurement, Define Services Procurement, User and Team Setup, Teams by Region/Service Type • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Teams, Teams by Region/Service Type	Determines which team will be defaulted to a requisition or work order. If there is no default team associated to the service requester, the system then looks for a team by region and service type.

Setting Up Roles for Role Actions

Access the eProcurement Role Actions page (Services Procurement, Define Services Procurement, User and Team Setup, Role Actions).

Role actions specify which roles can perform specific actions within the application. The services procurement role actions that PeopleSoft delivers begin with SP.

SP_ADD_SERV_PROVIDER Enables user to add service providers from the supplier portal.

Note. If this role action has an active role associated to it, the Add Service Provider link is visible and editable. If no roles are associated to this role action, the link is hidden.

SP_ADD_WO_ADHOC_ACT Enables you to add ad hoc work order activities.

SP_ALLOW_PASTDATE Enables you to add requisitions with a start date in the past.

SP_APPROVER Enables you to approve service requisitions.

SP_COORDINATOR_BUYER Enables you to edit a sourced requisition, cancel the requisition, and view the life cycle from the Sourcing and Review page.

SP_ENFORCE_PROJ_ATTR Enforces the timesheet attributes (Overtime and expense options) associated with the project on the requisition.

SP_ENTERPRISE_ADMIN Identifies enterprise administrators.

SP_EXP_APPROVER Determines which user roles can approve expenses.

SP_HIDE_SOURCING_PG Hides the sourcing preferences functionality from the requisition. It disables the sourcing preferences from the PeopleSoft Services Procurement requisition page, thus, preventing the requester from specifying preferred vendors.

SP_INVOICE_APPROVER	Enables you to approve invoices.
SP_IGNORE_REAPPR	Does not initiate the re-approval process for the roles assigned to this role action, when the requisition is filled with higher rate.
SP_OVERRIDE_SUR_FLAG	Enables you to override the survey required setting from the service type on the work order.
SP_PROVCNTCT_ACTION	Validates if the logged in user has the Provider Contact role. Determines valid actions on progress logs and work orders.
SP_REQUESTER	Determines which user roles can create service requisitions.
SP_SERVICE_PROVIDER	Identifies service providers.
SP_SRVC_COORDINATOR	Determines which user roles can source requisitions.
SP_SUPPLIER_ADMIN	Identified supplier administrators.
SP_SUPPLIER_INV_APPROVER	Enables service provider contacts to approve invoices.
SP_TIME_ADJUST	Enables you to adjust timesheets.
SP_TIME_APPROVER	Determines which user roles can approve timesheets.
SP_TIME_PROXY	Enables service provider contacts to enter timesheets on behalf of a service provider.
WF_REAAPR_REQUIRED	Enables you to edit a few fields (service coordinator, time approval, and competency description) on the requisition even after it's approved or sourced.
SP_EXPENSE_PROXY	Determines which user roles can enter expenses on behalf of the service provider.
SP_PLOG_APPROVER	Determines which user roles can approve progress logs.
SP_HIDE_RT_BREAKDOWN	Determine which users have access to view the Rate Break Down Details throughout the fulfillment transaction process.
SP_TIME_ADJUST_TRC	Enables which users can adjust time categories during the timesheet approval process.
SP_TIME_HIDE_TRC_SUM	Determines whether a user role can view time reporting code summaries. When you assign this role action to a user role, that role will not be able to view the summaries on the Review Timecard page.
SP_VMS_MSP_BREAKDOWN	Determine which users can view the VMS or MSP breakdown details throughout the fulfillment transaction process.

SP_WRKORDER_APPROVER Enables you to approve work orders.

Setting Up User Profiles

Access the User Profile page (Services Procurement, Maintain Users, Services User Setup, select Edit an existing Services User option in #1, select any type in step #2, and enter a person ID in #3, and then click the Update User Profile link (#7)).

Create a user profile for all users in the PeopleSoft Services Procurement system.

Note. Before you can set up user profiles for the service provider, service coordinator, and provider contact users, register them on the User Setup page.

To set up user profiles:

1. Access the User Profiles page Services Procurement, Maintain Users, Services User Setup, and enter a user ID.

2. Enter the required values, particularly email and address information on the User Profiles - General page.

   Note. To run either the Datamart Application Engine process or the Invoicing Application Engine process, select the permission list value of *SP* for the Navigator Home page, Primary, and Process Profile fields. Select this value only for users who run these processes.

   ---

3. Access the User Profiles - ID page and set user ID attributes.

   This table lists user roles and ID types:

User Roles	***ID Types***
Requester	If the requester is already set up as an employee, select *Employee* as the ID type. If the requester is not an employee, select *None* as the ID type. If you select *Employee* as the ID type, enter the correct employee ID in the Attribute Value field.
Service Coordinator	Select*Service Procurement Person* and *Employee* if the service coordinator is also an employee.
Service Provider	Select *Service Procurement Person.*
Service Provider Contact	Select *Service Procurement Person.*
Approver	Select *Employee* if the approver has an employee ID; otherwise, select *None.*
Invoice Manager	Select *Employee* if the invoice manager has an employee ID; otherwise, select *None.*
Executive	Select *Employee* if the user has an employee ID; otherwise, select *None.*
Administrator	Select *Employee* if the administrator has an employee ID; otherwise, select *None.*

4. Access the User Profiles - Roles page and select one of these role names for the user:

Note. This process can happen automatically based on the values defined in the Role Actions for the User page.

Warning! The *Person ID* selected on the user profile Services Procurement Person field *must* be unique. The person ID is used to send worklist entries, and if two users share the same person ID, the worklist entry may go to the incorrect user.

Note. To run Crystal reports, assign the Invoice Manager role to the user. This role provides access to the tree QUERY_TREE_SP and the access group SP_ACCESS_GROUP, which are necessary to run Crystal reports.

5. Access the User Profiles - Workflow page and enter the name of the approver who approves requisitions entered by the requester.

   Enter the approver name in the Supervising User ID field.

6. Access the Process Group Permission page and attach a process group value.

Note. To run all PeopleSoft Services Procurement application engines, select *POALL*, *GLALL*, *FSALL*, or *TLSALL* in the Process Group field.

Setting Up User Preferences

Access the User Preferences page (Services Procurement, Maintain Users, Maintain User Preferences).

You must set up user preferences for all requesters. You must also enter user preferences for service coordinators to enable service coordinators to create and manage requisitions on behalf of a requester. User preferences are optional for all other users.

To set up user preferences:

1. Select a user ID from the list of available values.
2. (Optional) Click the Overall Preferences link to capture the default business unit and default setID for the requester.
3. Click the Procurement link to enter requester preferences.

   Enter the required values, particularly the requester name. The selected requester has full authorization for creating, updating, and canceling requisitions.

4. Click the Requisition Authorizations link to define a requester's access to requisitions or to add multiple requesters to authorizations.

   The entry in the requisition authorization overrides the requester selected in the Requester field on the Procurement page.

5. Click the Vendor Processing Authority link to enable administrator access to enter, approve, and deactivate vendors.

Setting Up Service Requester Defaults

Access the Requester Defaults page (Services Procurement, Maintain Users, Service Requester Defaults and select the 'existing' option in step #1 and in step #2, select Requester, and click the Requester Default link). Service requester defaults make service requisition entry easier. The defaults that you define on this page are used on the requisition, simplifying the requisition entry process.

Requisition/Work Order

Service Type Select the default service type.

Service (Project Role) Select the default service (project role).

Invoice Approver Select the default invoice approver. The values include users who have at least one of the roles specified for the role action: *SP_APPROVER.*

Allow Time/Expense Overage % Select the default tolerance for time and expense.

Service Coordinator

Service Coordinator Click to add a default service coordinator who will source the requisition.

Service Team Click to add a default service coordinator team for the service coordinator. The system uses this default if the service requester does not have a default team, and the requisition region/service type does not have a team defined. The service team is not required.

Note. You can select a default Service Coordinator or Service Coordinator Team for the selected requester. If a default Service Coordinator team is specified, it will be the first selection for defaulting. If a default Service Coordinator is specified, it will only be used if no team is found on the Service Teams by Region/Service Type or Business Unit.

Notification Options

Requisition Notification Method Select the notification method for requisitions.

See Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining Work Order Settings, page 48.

Permissions

May Enter Work Order Select this option so that the user can add new work orders.

May Extend Work Order Select this option so that the user can extend the duration of the work order contract.

Note. Select this check box to enable users to extend work order agreements.

Authorized to Source to Preferred Suppliers Select this option so that the user can source requisitions to preferred suppliers.

Note. Select this check box to enable users to source requisitions to preferred suppliers in the sourcing details section of the requisition.

Setting Up Service Coordinator Defaults

Access the Service Coordinator Defaults page (Services Procurement, Maintain Users, Service Coordinator Defaults).

Use this page to set up defaults for persons with the Service Provider/Coordinator role.

Requisition/Work Order

Service Type Select the default service type.

Service (Project Role) Select the default service (project role).

Invoice Approver Select the default invoice approver. Values include users who have at least one of the roles defined in the role query: *SP_INVOI CE_APPROVER.*

Allow Time/Expense Overage % Select the default tolerance for time and expense.

Notification Options

Requisition Notification Method Select the notification method for requisitions.

See Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining Work Order Settings, page 48.

Permissions

May Enter Work Order Select this option so that the user can add new work orders.

May Extend Work Order Select this option so that the user can extend the duration of the work order contract.

Note. Select this check box to enable users to extend work order agreements.

Authorized to Delegate Select this option so that the user can delegate another service coordinator to source a requisition.

Authorized to Change Sourcing Rules Select this option so that the user can update the sourcing rules defined on the requisition when sourcing.

Creating and Editing Requesters

To create and edit requesters:

1. Access the Services User Setup page (Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup).

   Select the Create a new Services User option from group #1, and then select the Requester option from group #2.

2. Click the Next button on the first Services User Setup page to continue to the second Services User Setup page.

   Use this page to specify whether the requester has an existing user profile, or if the requester requires a new user profile.

   Note. If you select the option Yes (I need to add an existing user as a Requester), the system adds an additional field so that you select the user that you want to add as a requester. When you select the requester option, the system automatically takes you to the Requester Setup page, where you can edit the requester setup (see step 6.).

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3. If the user does not already exist, select the option No (I need to create a new user profile, then add the new user as a Requester) option on the Services User Setup page.

   When you select this option, the system adds a step for you to create a user profile for the requester.

   Note. If the HCM Person Integration is enabled, the Create User Profile link is not visible on the page when the user selects the option No. However, when the HCM Person integration is enabled, the requester user profiles must be created in the HCM system first.

   See Appendix C, "PeopleSoft Human Capital Management Integration," page 671.

4. Select the User Profile link on the Services User Setup page to access the User Profile Information page, where you can enter user ID and password information for the new user.

   Note. You must fill out this page completely in order to successfully create a new user ID for the user. If you do not fill out all the fields on the User Profile Information page completely, the system will not save the page.

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5. Click the OK button on the User Profile Information page to access the next Services User Setup page.

   After you create the user profile, the system adds another step to the Services User Setup page that enables you to add the new user as a Requester.

6. Click the Add button on the Services User Setup page to access the Requester Setup page.

7. Select the Return to Services User Setup link on the Requester Setup page to access the next Services User Setup page.

   When you return to the Services User Setup page, the system adds more steps for you to define security and user preferences for the requester.

8. Click the Finish button on the Services User Setup page once you complete the requester setup.

Creating and Editing Service Coordinators

To create and edit service coordinators:

1. Access the Services User Setup page (Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup).

   Select the Create a new Services User option from step #1, and then select the Service Coordinator option from step #2.

Person ID	Use this field to search for a Person ID to associate with the new service coordinator. **Note.** If you do not have a pre-existing person ID to associate with the new service coordinator, click the Add button to add a new person ID.
Add	Click to access the Maintain Service Coordinator page, where you can add a new person ID and define personal information for the service coordinator.

2. Click Go on the Services User Setup page to access the Maintain Service Coordinator page.

Person Type

Select to indicate whether the service coordinator is acting in the role of a Coordinator/Provider Contact or Service Coordinator.

Note. If this person has a role of Service Provider/Coordinator, the field is display-only.

Note. If you select the Coordinator/Provider Contact as the person type, the system automatically changes the Personnel Status field to a display-only status of Non-Employee, and you are unable to change the status of the field.

Changing the Person Type field to *Coordinator/Provider Contact* also enables the Create User Profile button on the Service Coordinator Information page. Use this button to access the User Profile Information page, where you can provide the user ID, password, and other information to create a user profile for the non-employee service coordinator.

Person Status

Select a value to indicate the status of the service coordinator. Values are *Active, Inactive,* and *Pending Registration.*

When the value is *Inactive,* the Coordinator Status field on the Service Coordinator Information page is also set to *Inactive.*

Note. If there are open transactions for this service coordinator, you cannot change the status to Inactive.

Note. In addition, if the service coordinator with the person type of service provider/coordinator is the only active member of a team, you cannot change the status to Inactive. You will receive an error message indicating that another active member must be assigned to the team.

Personnel Status

Select to indicate if the service coordinator is an *Employee* or *Non-Emple* (non-employee).

Note. If you select *Employee,* the system will enable you to search for a pre-existing user and employee ID on the Service Coordinator Information page. If you select *Non-Emple,* you can create a new user profile for the non-employee.

3. Access the Service Coordinator Information page.

Supplier Administrator Selecting the Supplier Administrator check box enables the coordinator and provider contact users to register other provider contacts for the same supplier.

Note. This check box appears if you select Coordinator/Provider Contact as the person type on the Maintain Service Coordinator page. Users that are defined with this person type can access to the Maintain Provider Contact and Manage Service Provider functionality from the Supplier portal for the related supplier organization.

Create User Profile Click to access the User Profile Information page, where you can provider a user ID, password, and other information for creating a user profile for the non-employee service coordinator.

Replace Service Coordinator Click this link to access the Replace Service Coordinator page. This link appears if there are any non-VMS transactions for the service coordinator.

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Replacing Service Coordinators, page 159.

Replace VMS Coordinator Click this link to access the Replace VMS Service Coordinator page. This link appears if there are any VMS transactions for the service coordinator.

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Replacing VMS Service Coordinators, page 164.

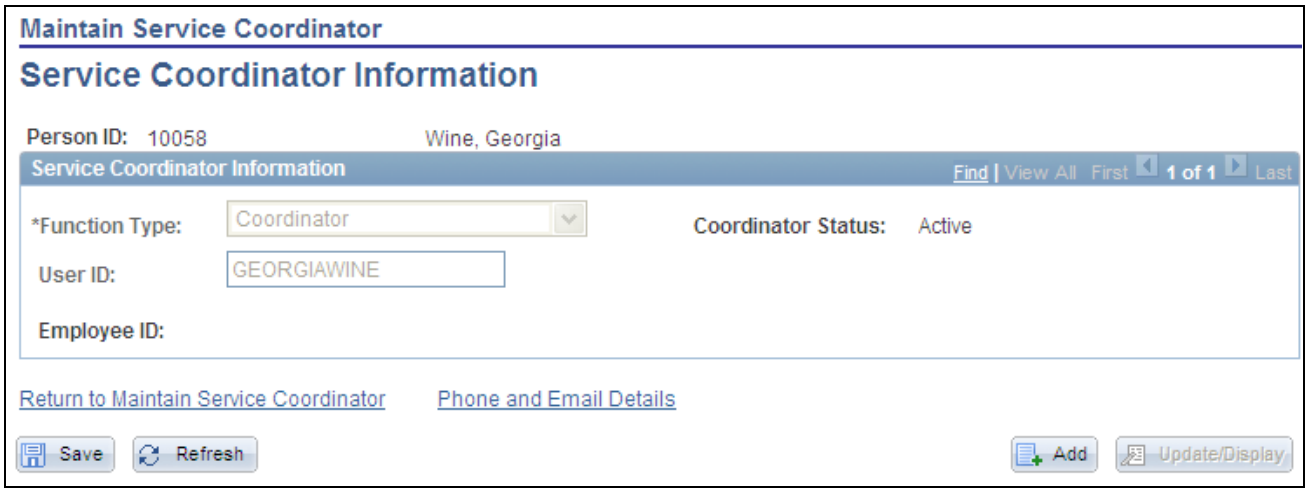
4. After you save the page, select the Return to Services User Setup link on the Maintain Service Coordinator page to access the modified Services User Setup page.

   When you return to the Services User Setup page from the Maintain Service Coordinator page, the system automatically adds additional links for you to add security and user preferences for your new service coordinator.

5. Click the Finish button on the Services User Setup page once you complete the service coordinator setup.

Viewing Service Coordinator Information

Access the Service Coordinator Information page (Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup).



Service Coordinator Information page

Coordinator Status

This field is display-only. If the service provider/coordinator role is revoked, the status is set to Inactive.

Important! The coordinator status on this page should not be confused with the higher level person status of the person as a whole. The higher level person status can also be set to Inactive. If this occurs, it would inactivate both the Service Provider and the Service Coordinator roles for same person. Consequently, the status on the Service Coordinator Information page would then reflect the inactive status of the higher level person status.

In summary, the Coordinator Status could be set to Inactive while the higher level person status may still be set to Active.

Creating and Editing Service Provider Contacts

Access the Services User Setup page.

To create and edit service provider contacts:

1. Select the Create a new Services User option from group #1, and then select the Service Provider Contact button from group #2.

2. Click the Add button on the Services User Setup page to access the Maintain Provider Contact page.

Note. Since the service provider contact is a non-employee, the system creates a new person ID for the new service provider contact.

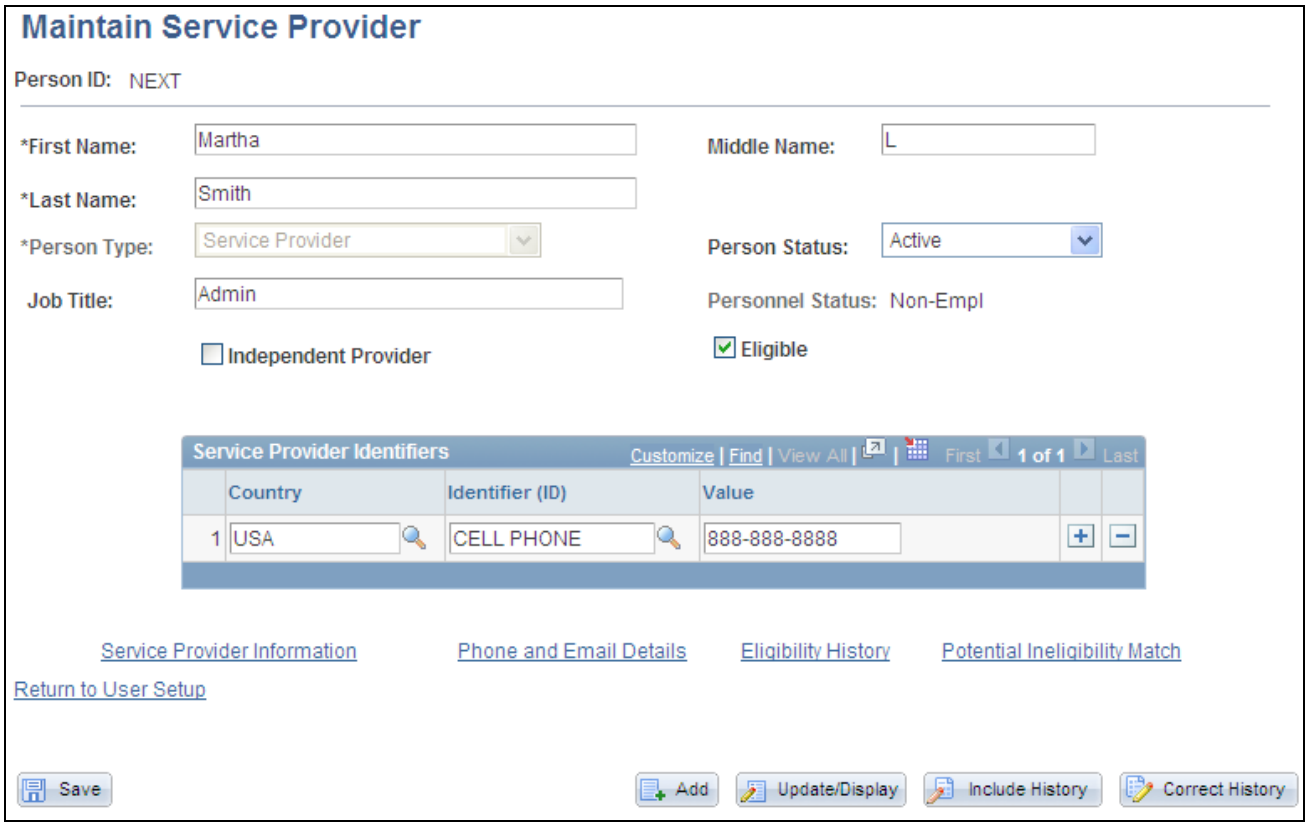
Person Type	Select *Service Provider* or *Service Provider/Coordinator*. **Note.** On the Maintain Provider Contact page, the person type field is always display-only.
Personnel Status	This field always defaults to Non-Employ (non-employee) and cannot be changed.

3. Select the Provider Contact Information link on the Maintain Provider Contact page to access the Provider Contact Information page
4. Select the Phone and Email Details link on the Provider Contact Information page to enter telephone and email details for the service provider contact.
5. After you save the page, select the Return to Services User Setup page link on the Maintain Provider Contact page to access the modified Services User Setup page.

   When you return to the Services User Setup page from the Maintain Provider Contact page, the system automatically adds additional links for you to add security and user preferences for your new service coordinator.

Creating and Editing Service Providers

Access the Maintain Service Provider page (Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup, select the Create a new Services User option from group #1, and then select the Service Provider button from group #2, and click the Add button on the Services User Setup page).



Maintain Service Provider page

Service providers record and view time and expense information and are those supplier users who perform a service. You use this page to add or update information about the supplier and to access additional details about service providers. If you are creating a new service provider, you must provide contact information before saving the information. Click the Service Provider Information link to select a contact. After you save the page, click the Return to Services User Setup link to access the modified Services User Setup page.

When you return to the Services User Setup page from the Maintain Service Provider page, the system automatically adds additional links for you to add security and user preferences for the new service provider.

Note. If you are adding a new service provider, the system creates a new person ID for the provider because service providers are non-employees.

Person Type

Select the type of user for this person. Values include:

Service Provider: This person records and views time and expense information. Service providers are those supplier users that perform the needed service.

Service Provider/Coordinator: This person sources and bids for service providers and also performs the duties of a service coordinator (recruiter).

Person Status

Select the person's status. Values include:*Active, Inactive,*and *Pending Registration.*

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Creating and Editing Service Coordinators, page 144.

Job Title

Enter the job that the person performs for the organization.

Independent Provider

Select to indicate that this service provider or service provider/coordinator does not have any provider contacts that represent them.

Eligible

Click to either indicate that the service provider is eligible or ineligible for new assignments. If the check box is selected, the provider is eligible for assignments. If the check box is deselected, the provider is ineligible for new assignments.

When you select or deselect the check box, the system displays the Eligibility Status Confirmation page. You use the page to assign a reason code for the eligibility change and if required enter comments for the change. The system tracks the changes made to a service provider's eligibility. Administrators and service coordinators can view the history by clicking the Eligibility History link.

Country

Select the country or countries in which you want to use this service provider identifier. The country that you select must have had at least one identifier ID assigned to it using the Service Provider Identifiers page. If IDs have not been assigned, the system cannot populate the Identifier ID field.

Identifier ID

Enter the type of identifier that you want to use to uniquely identify service providers. An identifier ID might be, for example, a US social security number. You must assign an identifier ID to a country to make it available for selection.

Value

Enter the value for the corresponding identifier ID. This value should be unique to the service provider. For example, if the ID is a social security number, the number should belong to the service provider. The system uses this value to match potential ineligible providers.

Service Provider Information

Select to access the Service Provider Information page.

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Service Provider Information, page 152 .

Phone and Email Details

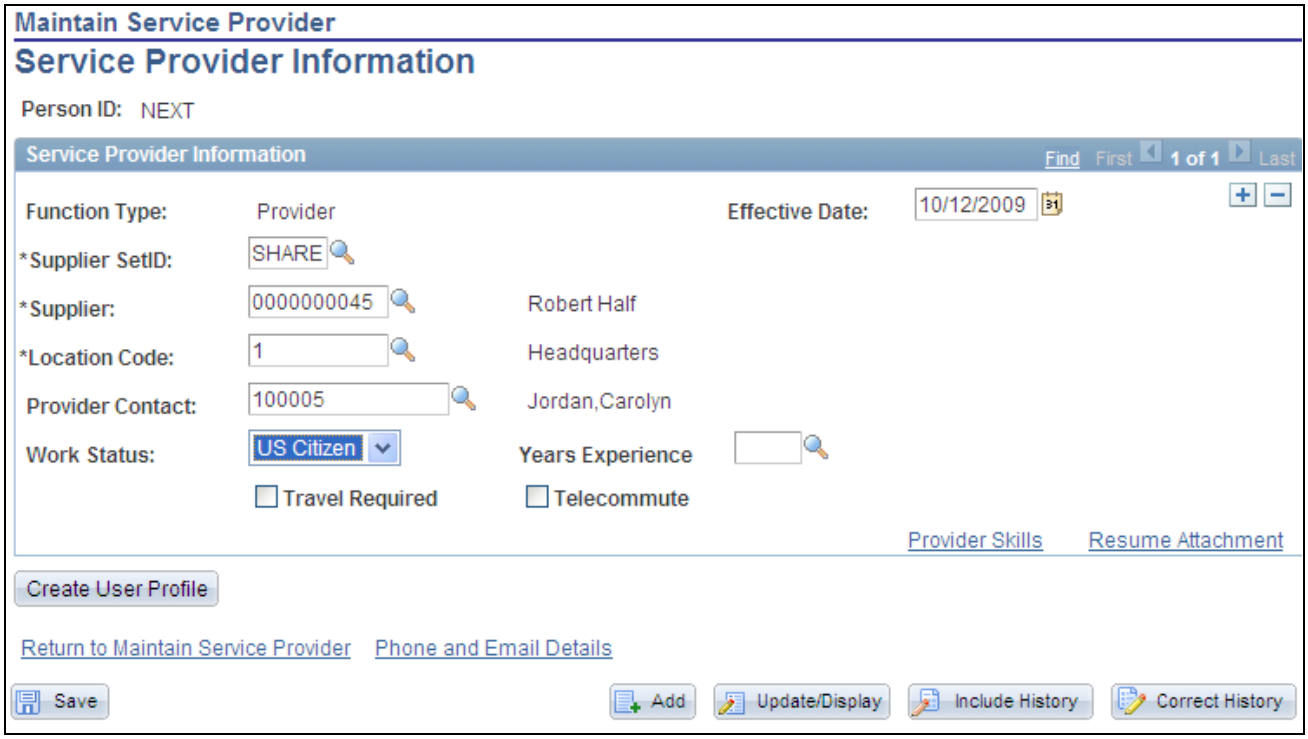
Click to access the Phone and Email Details page where you define phone and email information for the service provider.

Eligible History

Click to view updates that have been made for this service provider. The system displays the reason code for the update and any comments that were made in conjunction with the update. This link is not available for the service provider contact administrato

Maintaining Service Provider Information

Access the Service Provider Information page (click the Service Provider Information link on the Maintain Service Provider page).



Service Provider Information page

Along with maintaining service provider information, you can click the Provider Skills link to maintain skills, and click the Resume Attachment link, to upload and attach a resume.

Note. This page displays fields that you use to define supplier user service providers. If you are defining information for an independent provider, the page provides a Vendor SetID field instead of a Supplier SetID field.

Function Type Indicates if a service provider is an independent provider. Independent providers do not require provider contact information as do supplier providers. This is a display-only field.

Effective Date Select a date for which you want this service provider to become available for actions. The date determines when you can view and change information for the provider.

Supplier Set ID Select a supplier setID. A setID enables the sharing of control data among business units. This value determines the values available for the Supplier field.

Supplier Select a supplier. Only values for the selected supplier setID are available. This field also determines the values that are available for the Location Code field.

Location Code Select a supplier location code. This defines the address for the supplier.

Provider Contact Select a provider contact. A service provider contact is a supplier who can manage a service provider roster, view service requisitions, submit bids, communicate with service coordinators, view bid and response information, enter progress logs, and view timesheets and expenses.

Note. If you are defining an independent service provider this field is not available.

Work Status Select a status that indicates the work status for the service provider. These statuses provide the conditions under which a service provider can be employed and include:

GC Holder: (green card holder)

*H-1 Visa:*A nonimmigrant visa category in the United States under the Immigration and Nationality Act.

NAFTA: (North America Free Trade Agreement)

Other

U.S Citizen

Years Experience Select a value that best describes the service provider's experience.

Travel Required Select to indicate that the service provider is required to travel.

Telecommute Select to indicate that the job allows the service provider to work from home.

Setting Up Service Provider Identifiers

Access the Service Provider Identifiers page (Services Procurement, Define Services Procurement, User and Team Setup, Service Provider Identifiers).

A service provider identifier ID is high-level, unique global information, such as social security, passport, or tax ID numbers. You use this ID to help uniquely identify service providers. You set up identifier IDs by country using this page, and can define as many IDs as you need for any country.

After establishing the country and identifier ID, you can use the information when you create or edit service provider information. The system makes the country and identifier IDs available for individual service provider pages where you can add identifier ID values for each service provider. These values then make unique cross references for the service provider which the system uses for searching and matching when the provider eligibility feature is activated for a business unit.

You use identifier IDs in the bidding process and work order creation processes to help determine eligibility for providers. Any match or potential matches of an identifier ID against a service provider produces a system warning for administrators and service coordinators.

Identifier (ID) Enter the type of identifier that you want to use to uniquely identify service providers. A type of identifier might be, for example, a US social security number. Because a social security number is assigned to a specific individual, then as an identifier, the value of that number can be used as a cross reference to uniquely identify the service provider. Other identifiers can include such things as drivers license or passport numbers.

Description Enter a short description for the identifier ID.

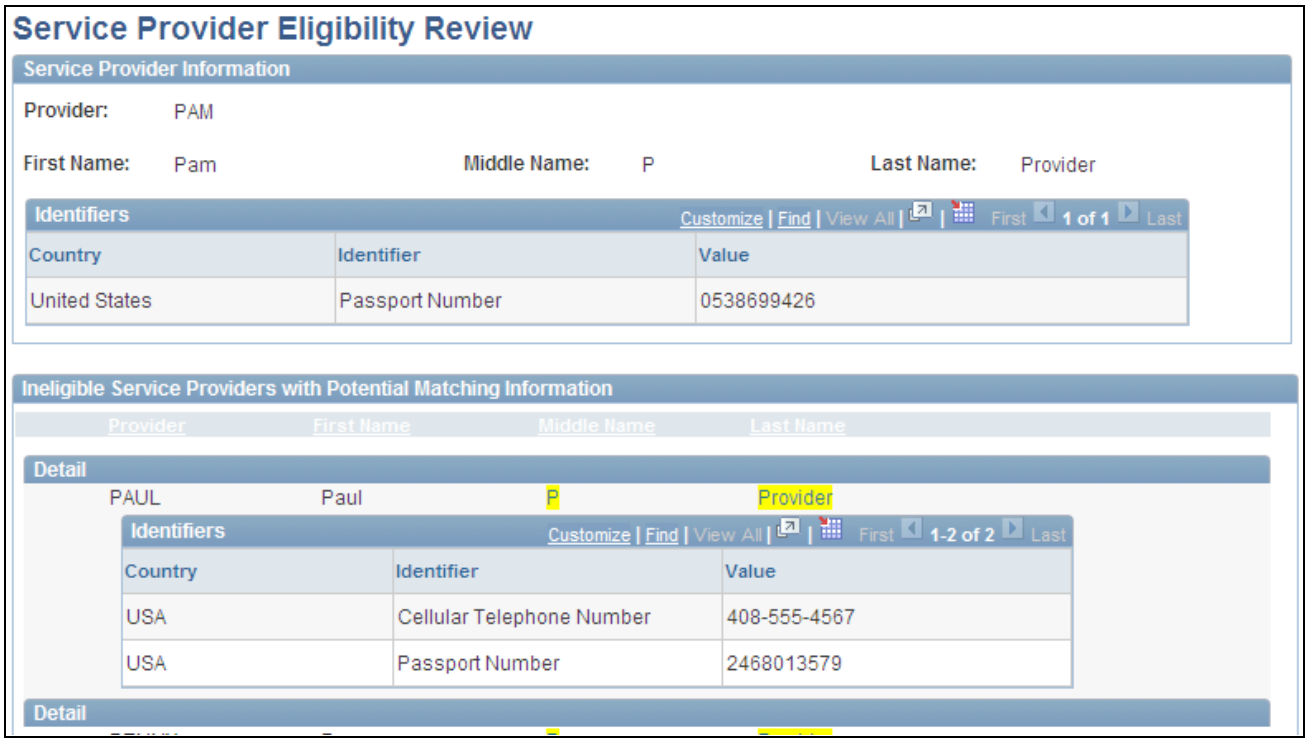
Long Description Enter an extended description for the identifier ID.

Hide Fields Select to indicate that you don't want to display the values for this identifier on the list of potential matches to the service coordinator or requester.

Country Code (Optional) Select the country or countries in which you will use this identifier ID. The identifier code is only available with the country codes you select. If a country code is not selected, the identifier ID is available for all countries.

Searching for Eligible Service Providers

Access the Service Provider Eligibility Review page (Services Procurement, Define Services Procurement, User and Team Setup, Provider Eligibility Search)



Service Provider Eligibility Review page

You use this page to display a list of service providers that have been identified as not currently eligible to fill work orders and are a potential match to the specified service provider. The system tracks service providers that have been identified as not eligible for new assignments. Along with using the Provider Eligibility Search menu option, you can access this page from the Maintain Service Provider, Bid Response, and Work Order pages. Contents on the page vary depending on the navigation and role of the user accessing the page

The Service Provider Eligibility Review page uses search criteria and when you perform a search, provides the results of the search. The Service Provider Details group box displays identifiers that have been created for the service provider on which the search is based. If you determine there is a match, you can mark the specified provider as not currently eligible.

This is a Verity search and requires that you have setup search fields using the SP_PROVIDER data object set. This setup is described in the next section.

Note. Only service providers that have the Eligible check box deselected will display on the list of potential matches to the service coordinator or requester.

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Creating and Editing Service Providers, page 149.

Person ID

Select the person ID for the service provider. The system displays the service provider's name.

Country

Select the country for which you want to search. You can enter up to four country codes and their associated identifier IDs and ID values.

Identifier

Select the identifier ID. You can search on a single ID or use any other ID that has been defined for the service provider.

Value

Displays the value assigned to the service provider for this country and identifier ID combination.

Select

Select when you want to indicate that the corresponding service provider's status should be set to Unacceptable. After you make the selection, click the Potential Match Found button to notify the administrator. If you are the service coordinator or requester, you need to cancel the work order or select a new service provider.

Match Found

Click to indicate that there is a potential match for an ineligible service provider. If a listed service provider is identified as an actual match, you should select the Select check box for that provider before clicking the Match Found button. When the administrator clicks the Match Found button, the system updates the eligibility status of the provider to indicate that the provider is not eligible.

If a service coordinator or requester clicks the Match Found button, the system sends a notification to the administrator to change the service provider on the bid or work order to an Ineligible status. At this point, the service coordinator or requester can only cancel the work order or select a new service provider.

The system uses a system-supplied generic email template (INEB_PROV) to notify the administrator. You can update the template.

Match Not Found Click to indicate that there are no potential search results that match the service provider. When you click the button, the system returns you to the page from which you launched the search. When there are no matches, the bid response and work order submission processes can continue.

Setting Up Verity Searches for Service Provider Information

Verity is an embedded feature in PeopleTools that enables you to do full-text searching for information. PeopleSoft delivers Services Procurement with predefined Verity setup values that simplify setting up and using basic Verity search capabilities.

You can modify the predefined data or perform more advanced tasks by developing new data object sets where you identify groups of related records to use for a search index. Along with developing data object sets, you must also define data objects that define record relationships for the index.

Note. This section does not describe advanced Verity search setup tasks, rather it describes how you use those searches predefined for Services Procurement.

See "Configuring Search and Building Search Indexes," *PeopleTools PeopleBook: PeopleSoft System and Server Administration.*

See *PeopleSoft Supply Chain Management Common Information 9.1 PeopleBook*, "Implementing the Verity Search Engine," Understanding the Verity Search Engine.

These steps provide the process and navigation for viewing and updating the ineligible service provider Verity search:

1. Locate the predefined SP_PROVIDER provider eligibility search index.

   Services Procurement provides a predefined search index for ineligible providers. Access the Define Search Index page by selecting: Set Up Financials/Supply Chain, Common Definitions, Search Content, Define Search Index, and select SP_PROVIDER in the Search Index Name field.

   Select the Search Index Fields tab to view the predefined fields that are stored in the search index. The fields include the *Person ID, First Name,Last Name,Middle Name,* and *Value* fields.

   You can use the page to define a new search index and a specific data object set for use with the index. You can also define additional fields that the system will store in the search index.

2. Build and update the SP_PROVIDER search index.

   Access the Build Search Index page by selecting: Set Up Financials/Supply Chain, Common Definitions, Search Content, Build Search Index, and select SP_PROVIDER.

   You use the Build Search Index page to create and update the SP_PROVIDER search index and collections to enable ineligible service provider searches. The system initializes the page with values based on the index name that you select. You must create a run control that the system uses to create a new index or rebuild the entire index. Select the *Create New/Rebuild* option in the Build Options field to create the index.

   After building the index, if you change a service provider's ineligibility information, you can use the *Last Modified Index* build option in the Build Options field to refresh the index with the most current provider data.

   Note. You can use the Search Index Fields page to define additional search index fields.

   See *PeopleSoft Supply Chain Management Common Information 9.1 PeopleBook*, "Implementing the Verity Search Engine," Creating and Updating the Verity Search Collection.

3. Test the SP_PROVIDER search index.

   Click the Test Index link on the Build Search Index page to access the Search Test page. This page displays the search index that you will build or update. When you access the page, you can enter a text string on which to search. The system checks for the text and displays the information about where the text is used and when the element in which it is used was updated.

4. View or update the SP_PROVIDER_SRCH search query.

   Access the Build Search Query page by selecting: Set Up Financials/Supply Chain, Common Definitions, Search Content, Define Search Query, and select SP_PROVIDER_SRCH.

   When you define the search query, you group search fields, field labels, and application classes into a search index that you can use to perform Verity searches for ineligible service providers. The search queries should include the system-supplied search index SP_PROVIDER.

5. View or update the SP_PROVIDER_RSLT search results.

   Access the Define Search Result page by selecting: Set Up Financials/Supply Chain, Common Definitions, Search Content, Define Search Result, and select SP_PROVIDER_RSLT.

   You use the page to group search fields, field labels, and application classes into a search index that you can use to perform Verity searches for ineligible providers. The search results should include the system-supplied SP_PROVIDER_RSLT search result.

See *PeopleSoft Supply Chain Management Common Information 9.1 PeopleBook*, "Implementing the Verity Search Engine," Understanding the Verity Search Engine.

Creating and Editing Combined Service Providers/Coordinator Roles

To create and edit service provider/coordinators:

1. Access the Services User Setup page (Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup).

   Select the Edit an existing Services User option from step #1.

2. Select the Service Provider option from step #2.

3. Select the Person ID that you want to change to a service provider/coordinator user.

   Note. Only *existing* service providers can be assigned to this role.

4. Click the Edit Service Provider link from step #4 to access the Maintain Service Provider page.

5. Select *Service Provider/Coordinator* in the Person Type field.

   You will receive a confirmation message indicating your approval to change this person to the new service provider/coordinator role. Click the OK button to accept the changes, and to return to the Maintain Service Provider page.

6. Click Save button to assign this role.

7. Click the Return to Services Setup link.

8. (optional) Click the User Preferences link from step #5, and then click the Service Coordinator Defaults link to add any specific defaults such as the time approver and any permissions that you may want this person to have.

   Save your changes, and then click the Return to Services Setup link.

9. (optional) Click the Update User Profile link to make changes to the existing user profile, and then click the OK button to return to the Services Setup page.

10. Click the Finish button or the Return to Define Services Procurement link.

Note. A service provider can be associated to multiple suppliers with the service provider becoming effective for the new supplier on a designated effective date. For a user with the combined role of service provider/coordinator, the supplier information for the service coordinator should be in sync. An email notification is sent to the service administrator making the change when the service provider gets associated to a different supplier. The service administrator will have to manually change the supplier information for the coordinator when the associated service provider becomes effective for the new supplier.

For the combined service provider/coordinator role, the vendor information from the Maintain Service Coordinator page cannot be changed. An error message will be displayed if the vendor information is changed on the Maintain Service Coordinator page for a Service Provider/Coordinator role user. For this user, the vendor information can be changed only on the Service Provider Information page.

The service administrator will receive a warning message if there are no active approved work orders assigned to the service provider, and can click the OK button to proceed with changing the role to a service provider/coordinator.

Revoking Service Provider/Coordinator Roles

The following describes the steps involved when the service provider/coordinator role is revoked:

1. Service administrator accesses the Maintain Service Provider page (Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup).

2. Service administrator changes the person type from *Service Provider/Coordinator* to *Service Provider*.

   The system validates that the service provider/coordinator is not associated to any active work orders. If the service provider/coordinator is associated to any active work orders, an error message displays, and the service administrator will not be able to change the person type to being just a Service Provider

   If the service provider/coordinator is associated to any active work orders, an error message displays and the system will direct the service administrator to identify a replacement service coordinator for all active work orders for this Service Coordinator before attempting to revoke the coordinator role again.

3. If the service provider/coordinator is the only active team member, an error message displays and the system and will direct the service administrator to assign another active member to the team before attempting to revoke the coordinator role.

4. Upon confirmation, the system revokes all the service coordinator roles that were granted to the service provider.

   The system sets the Person Status field to Inactive on the Maintain Service Provider page.

5. The person continues in the system as a service provider, and can continue entering time or can be submitted as a candidate for other sourced requisitions.

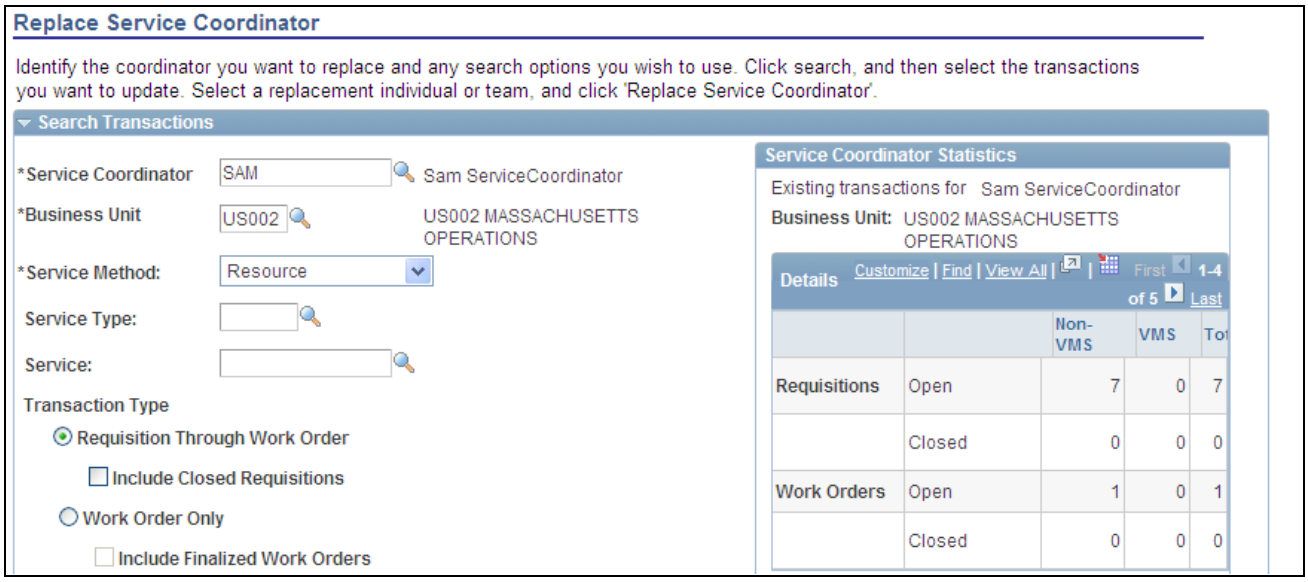
   The system sets the service coordinator status to Inactive.

If there are any open requisitions or work orders for the service coordinator, an error message displays and the person type will not be changed. In addition, if the service coordinator is the only active member of a team, an error message displays stating that another active member must be assigned to the team before revoking the service provider/coordinator role.

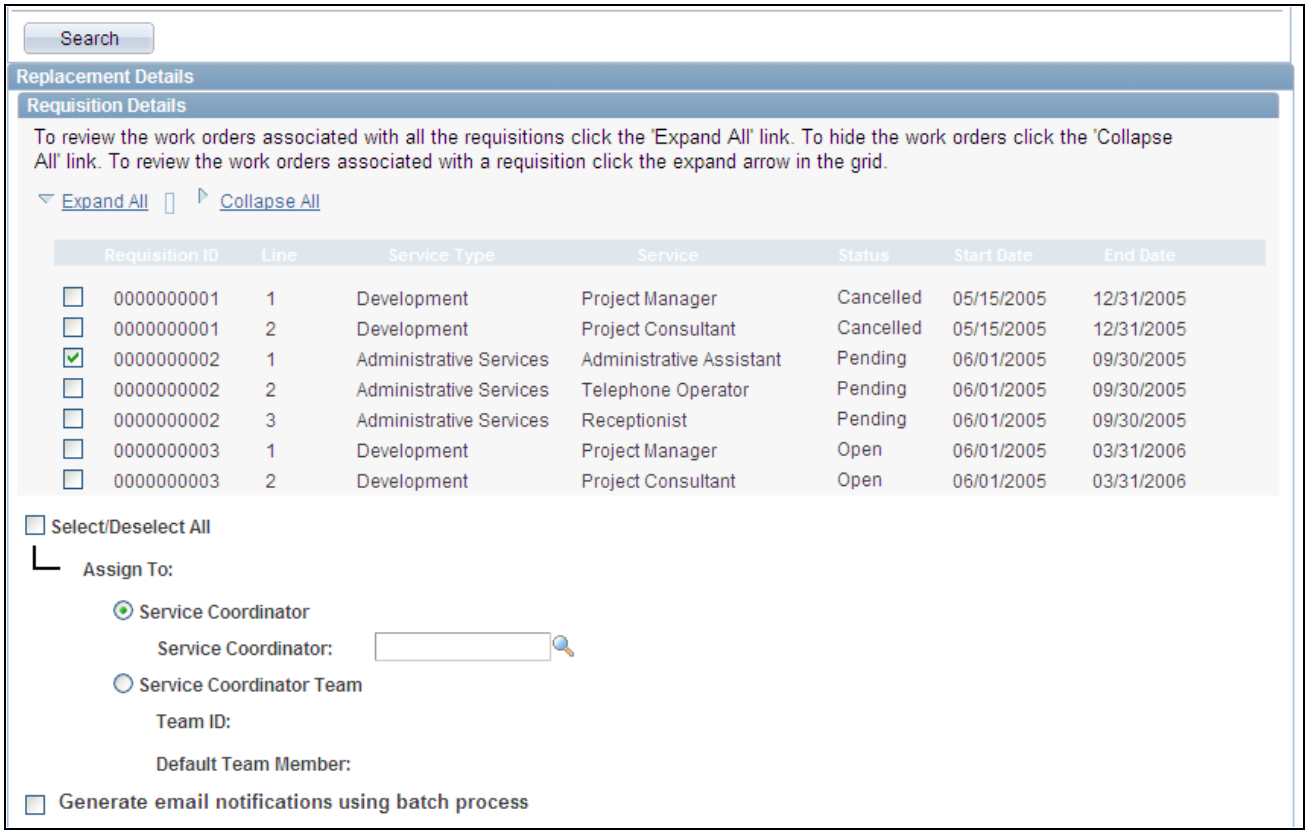
In addition, the system also display an error message if the service provider/coordinator (user) is defined as a service coordinator for a VMS business unit or for a VMS by business unit and Service Type.

Replacing Service Coordinators

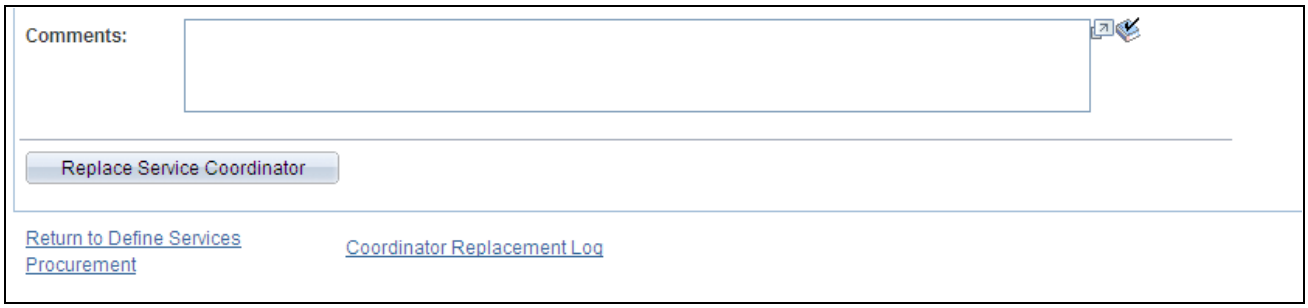
Access the Replace Service Coordinator page (Services Procurement, Maintain User, Replace Coordinator).



Replace Service Coordinator page (1 of 3)



Replace Service Coordinator page (2 of 3)



Replace Service Coordinator page (3 of 3)

The fields on this page differ from this page shot if the search criteria is for work orders only. Differences are noted.

You may want to use this functionality to distribute workload more evenly between service coordinators.

Note. When the Replace Service Coordinator utility is used to change the assigned service coordinator for requisitions, the change tracking rules are followed. Thus, the change tracking template is checked to determine whether the Service Coordinator field is being tracked, and if so a change tracking record is created.

Search Transactions

Service Coordinator

Select the service coordinator that you want to replace. This is a required field.

Business Unit

Select the business unit for the service coordinator. This is a required field.

Service Method

Select a method on which to base a search. This is a required field. Methods include:

Deliverable: Select to search for services that are generally performed by an entire work force, such as a requisition or work order for an entire project, not just the hours worked by a single service provider.

Multi Resource: Select to search for requisition or work order services that support multiple, unique services and service providers.

Resource: Select to search for requisition or work order services of an individual service provider.

Service Type

Select a value for the service coordinator. If you want to retrieve all service types, leave this field blank.

Note. If the Use HCM Terminology? option is selected on the Services Procurement Installation Options page, the label for this field is Job Family.

See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Defining Services Procurement Installation Options.

Service

Select a project role for the service coordinator. If you want to retrieve all project roles, leave this field blank.

Note. If the Use HCM Terminology? option is selected on the Services Procurement Installation Options page, the label for this field is Job Code.

Transaction Type

Select a value to determine the types of transactions to be retrieved. Values are:

- Requisition Through Work Order: Select this option to retrieve all associated services requisitions and work orders.

  Include Closed Requisitions: Select this option if you want to include all closed services requisitions.

- Work Order Only: Select this option if you want to retrieve work orders only.

  Include Finalized Work Orders: Select this option if you want to include any work orders that have been finalized.

View Coordinator Statistics

Click this link to display the number of transactions associated to the selected service coordinator. The statistics information includes only the top-line, multi-resource transaction information, and does not provide lower-level services information.

Hide Coordinator Statistics

Click this link if you do not want the system to display the coordinator statistics.

Note. This link is available only after you have clicked the View Coordinator Statistics link.

Search

Click to retrieve transactions based on the search criteria.

Service Coordinator Statistics

This grid displays the total number of transactions for the service coordinator. The information is summarized for the specific business unit entered in the Search Criteria section, and the information is also summarized for all business units to which the service coordinator is associated.

You can view information such as the:

- Number of open and closed requisitions.
- Number of VMS and non-VMS requisitions.
- Number of open and closed work orders.
- Number of VMS and non-VMS work orders.

Requisition Details and Work Order

This section displays either requisition or work order details such as requisition ID, service type, service, vendor, provider contacts, work order type and status, and start and end dates. If the search criteria is for Work Order Only, the name of this step box would be Services Work Orders. Any differences in information displayed are noted.

Expand All and **Collapse All**

These options appear when the transaction type of Requisition Through Work Orders is selected. Click to expand or collapse the grid to view any work orders associated with requisitions.

Click the arrow toggle switch button to display associated work orders for a single requisition line. If there are no associated work orders for the requisition line, this button is hidden.

Click the Selection check box next to the requisitions or work orders where you want to replace the services coordinator.

Positions

Click to view lower-level services associated with either the requisition or work order. When you access the Replace Service Coordinator page, the system displays the top-line service coordinator for the requisition or work order. When you replace the top-line requisition or work order coordinator, the system also replaces the corresponding lower-line coordinators for the requisition or work order.

When you click the Positions link, you access the Multi Resource Service Information page. The page displays the service and service type and the number of positions for the each service type. This link is available when a multi-resource requisition or work order has more than one service position.

Select/Deselect All

Click to automatically select or deselect all the check boxes in the search results grid.

Assign To

Select to whom the requisitions or work orders should be reassigned. Values are:

- Service Coordinator: Select the specific service coordinator to whom you are reassigning requisitions and work orders.
- Service Coordinator Team: Select this option to reassign to a service coordinator team. If you select this option, the Team ID and Default Team Member fields become available:
  - Team ID: Select this option and all team members receive notification of the reassignment.
  - Default Team Member: Select this option and the specific team member that you select is notified of the reassignment.

Generate email notifications using batch process

Select this option to run the email notifications as a batch process rather than including them as part of the online processing. The service coordinator or team receives an email that includes a link to the Coordinator Replacement Log for the transactions that have been reassigned.

Note. A URL must be defined for the replacement email notification. Define this URL using the URL Maintenance page (PeopleTools, Utilities, Administration, URLs) for the *SP_REPLACESC_EM* and *SP_REPLACETEAM_EM* URL identifiers.

Comments

Enter any applicable free-form text related to the reassignment.

Replace Service Coordinator

Click to replace the service coordinator on all selected transactions. A confirmation page displays, and you must click the OK button to confirm the replacement process. In addition, upon clicking the OK button, email notifications will be generated either online or in batch if the Generate email notifications using batch process option has been selected.

Coordinator Service Log

Click this link to access the Coordinator Service Log to view transactions associated with the reassignment.

Replacing VMS Service Coordinators

Access the Replace VMS Coordinator page (Services Procurement, User and Team Setup, Replace VMS Coordinator).

This page behaves in a similar manner as the Replace Coordinator page which is used for non-VMS transactions. The VMS-related differences are described here.

Note. When replacing the VMS Service Coordinator on Work Orders, if the replacement process detects that the work order's supplier invoice approver is the same person as the VMS service coordinator that is being replaced, the system will also updates the supplier invoice approver with the *replacement* service coordinator.

VMS Supplier

Select the VMS supplier for which transactions are to be reassigned. If there is only one VMS supplier, then it appears as a default value in this field. This is a required field.

Service Method

Select a method on which to base a search. This is a required field. Methods include:

Deliverable: Select to search for services that are generally performed by an entire work force, such as a requisition or work order for an entire project, not just the hours worked by a single service provider.

Multi Resource: Select to search for requisition or work order services that support multiple, unique services and service providers.

Resource: Select to search for requisition or work order services of an individual service provider.

Replacement Method

Select a value to indicate the method to use for replacement. Values are:

- Use Transaction's Current VMS Relationship Definition: Select this option to indicate that the selected transactions will be assigned to the VMS coordinator or team that is currently effective for the related service type or business unit and VMS supplier.

  This is the default value for the field.

  If the check boxes next to the transactions in the Requisition Details group box are display only, one of the following scenarios may be occurring:

  - The service coordinator associated with the current VMS definition is the same as the service coordinator that you are trying to replace.

  - If the VMS definition uses a service coordinator team, then the current VMS definition shows a team that is different from the transaction selected.

  Note. You will not be able to select this replacement method if the service coordinator, team, or if the service coordinator is the only member of the VMS supplier team. For example, if the VMS transactions are being handled by only one VMS service coordinator team, then you cannot use this replacement method. In addition, if the service coordinator is the only member of the VMS team, then you cannot use this replacement method.

  Note. Once a VMS service coordinator has been replaced on a requisition, the replacement service coordinator takes precedence over any *other* service coordinator changes made to the VMS setup definition. For example, when a requester creates a VMS-managed service requisition, the VMS supplier, location and service coordinator are assigned to the VMS requisition from the VMS setup definition. Then, when the requester edits the requisition, the system checks for more recent changes to the VMS supplier, location, and service coordinator defined in the VMS setup definition. If the system finds more recent changes to these fields, it refreshes the requisition with the most recent VMS setup information.

  However, if the requisition's VMS Service Coordinator has been replaced by the Replace VMS Coordinator function, then the system applies the change made by the replacement feature as taking precedence, and the system *will not* refresh the VMS Service Coordinator on the requisition, even if there has been a more recent change in the VMS setup definition.

- Specify Replacement Coordinator/Team: Select this option to indicate that all selected transactions will be assigned to a single VMS team or service coordinator.

  If you select this option, the Service Coordinator and Service Coordinator Team fields become available where you can assign the transactions.

  See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Replacing VMS Service Coordinators, page 164 .

Requisition Details and Work Order

This section displays requisition and work order details such as requisition ID, service type and method, service, vendor, provider contacts, work order type and status, start and end dates, and the service coordinator or service team defined for the VMS supplier.

If the search criteria is for Work Order Only, the name of this step box is Services Work Orders.

Service Coordinator from VMS Definition

This column displays the VMS service coordinator that is defined for this VMS supplier.

Service Team from VMS Definition

This column displays the VMS service team that is defined for this VMS supplier.

Positions

Click to view lower-level services associated with either the requisition or work order. When you access the Replace VMS Coordinator page, the system displays the top-line VMS coordinator for the requisition or work order. When you replace the top-line requisition or work order VMS coordinator, the system also replaces the corresponding lower-line VMS coordinators for the requisition or work order.

When you click the Positions link, you access the Multi Resource Service Information page. The page displays the service and service type and the number of positions for the each service type. This link is available when a multi-resource requisition or work order has more than one service position.

Confirmation Message for VMS Coordinator Replacement

The following discusses the confirmation messages received when you click the Replace Service Coordinator button on the Replace VMS Coordinator page:

- If the replacement method is Use Transaction's Current VMS Relationship Definition:

  The system will reassign the service coordinator for the selected transactions, using the current effective-dated VMS service team/service coordinator established on the selected transactions' VMS relationship definition, as shown in the Service Team/Service Coordinator from VMS Definition columns of the Requisition (Work Order) transaction grid.

  Please either confirm or cancel the reassignment. This operation may take several minutes to complete. Please be patient.

- If the replacement method is Specify Replacement Coordinator/Team:

  The confirmation message displays the quantity of requisitions or work orders selected, as well as the Service Coordinator or Team that will receive the reassignment of the selected transactions.

Viewing Service Coordinator Replacement Logs

Access the Coordinator Replacement Log page (Services Procurement, Maintain Users, Coordinator Replacement Log).

The service coordinator will receive an email which contains a link to the Coordinator Replacement Log page. The email includes a list of all requisitions and work orders that have been reassigned to the service coordinator. The replacement log displays the top-line requisition or work order information along with lower-line service requisition or work orders derived from multi-resource requisitions or work orders. The system also provides lower-level services replacement information for individual transaction history pages.

Search Service Coordinator

From Service Coordinator	Select the service coordinator that was replaced.
To	Select a value to indicate the role that was replaced: Values are *Service Coordinator* and *Service Coordinator Team.*Select the service coordinator or service coordinator team in the adjacent field that is available.
Business Unit	Select the specific business unit associated with the service coordinator. If you want to see all business units to which the service coordinator is associated, leave this field blank.
Requisition ID	(Optional) Select a specific requisition or leave this field blank if you'd like to retrieve all requisitions associated with the service coordinator.
Work Order ID	(Optional) Select a specific work order or leave this field blank if you'd like to retrieve all work orders associated with the service coordinator.
Date From and **Date To**	(Optional) Enter the beginning and ending dates to narrow the results that are retrieved.

Service Coordinator Logs

Requisition ID and **Work Order ID**	Click a link to access information related to the requisition or work order.
Return to Replace Coordinator	Click this link to access the Replace Coordinator page. **Note.** If you are reviewing VMS service coordinators, the link will read Return to Replace VMS Coordinator.

Creating and Editing Service Administrators

To create and edit service administrators:

1. Access the Services User Setup page (Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup).

   Select the Create a new Services User option from step #1, and then select the Service Administrator option from step #2.

2. Once you select the Create a new Services User and Service Administrator options, the system adds step #3 for you to enter a user ID for the new service administrator user.

   Note. If you choose to edit an existing service user, the system adds step #3, where you must chose the user ID that you want to edit.

3. Click the Add button on the Services User Setup page to access the User Profile Information page, where you can enter passwords, general attributes, permission lists, and workflow attributes.

4. Once you finish entering information on the User Profile Information page, click the OK button to return to the Services User Setup page.

   When you return to the Services User Setup page, the system adds more steps for you to edit and define security and user preferences for the service administrator.

5. Click the Finish button on the Services User Setup page once you complete the service administrator setup.

Creating and Editing Approvers

To create and edit approvers:

1. Access the Services User Setup page (Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup).

   Select the Create a new Services User option from step #1, and then select the Approver option from step #2.

2. Once you select the Create a new Services User and Approver options, the system adds step #3 for you to enter a user ID for the new approver user.

   Note. If you choose to edit an existing approver user, the system adds step #3, where you must choose the user ID that you want to edit.

3. Click the Add button on the Services User Setup page to access the User Profile Information page, where you can enter passwords, general attributes, permission lists, workflow attributes, and approver authorizations.

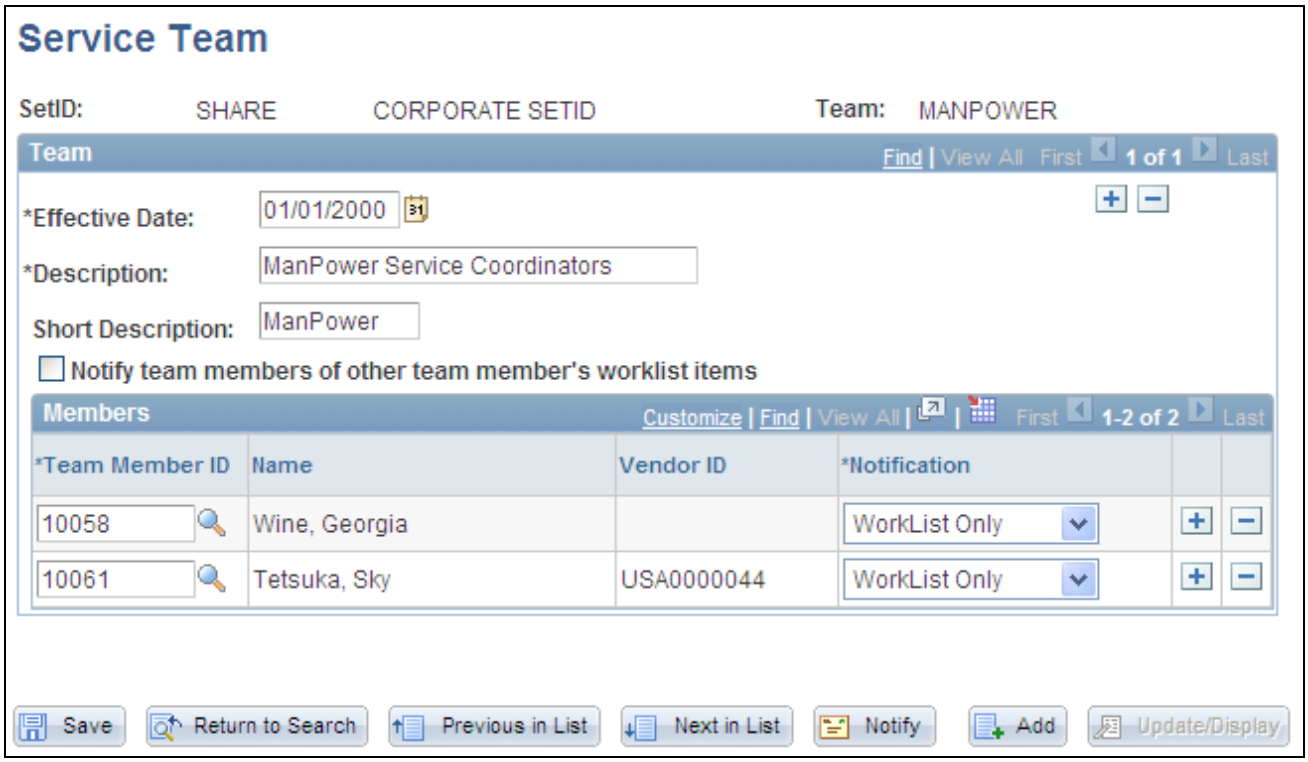
4. Once you finish entering information on the User Profile Information page, click the OK button to return to the Services User Setup page.

   When you return to the Services User Setup page, the system adds more steps for you to edit and define security and user preferences for the service administrator.

5. Click the Finish button on the Services User Setup page once you complete the service administrator setup.

Creating Service Coordinator Teams

Access the Service Team page (Services Procurement, Define Services Procurement, User and Team Setup, Service Team).



Service Team page

Use this page to select the services coordinators that belong to each team and specify their notification preferences.

The system stores the service team or service coordinator from the requisition on the work order. If the work order is not created from a requisition, and the user creating the work order is a requester, the system uses the default service coordinator team or default service coordinator from the requester defaults. If the work order is not created from a requisition, and the user creating the work order is a service coordinator that belongs to a team, you can select from all the service coordinator's teams or you can assign it to an individual service coordinator. If the user doesn't belong to any teams, the system makes the user the service coordinator on the work order.

Notify team members of other team member's worklist items Select to notify all team members with a notification type of *Email and Worklist* or *Worklist Only* when any service coordinator on the team receives a worklist notification. The initial sourcing notification will be sent to all team members regardless of this setting

Maintaining Workflow Setup

This section discusses how to set up workflow.

See Chapter 8, "Setting Up PeopleSoft Services Procurement Workflow," page 227.

Maintaining Settlement Setup

To define Services Procurement business unit options, use the Services Procurement Options (BUS_UNIT_SPRO) component.

To define shifts, use the Shifts (SPB_SHIFT) component. To define shift and service combinations, use the Shift by Service (SPB_SHFT_BY_SRV) component. To define assignments, use the Assignments (SPB_ASSIGNMENT) component. To define assignment and service combinations, use the Assignment by Service (SPB_ASGN_BY_SRV) component. To define time category overrides, use the Review/Override Time Categories (SPA_TM_EDIT_TRC) component.

To define rules for reporting time, use the Time Reporting Rule (SPA_TRULE_DEFN) component. To set up the AP interface, use the AP interface (SPA_AP_INTRFACE) component. To set up payment types, use the Payment Types (SPA_EXPEND_MTHD) component. To set up expense types, use the Expense Types (SPA_EXPENSE_TYPE) component. To define your service time/progress template, use the Service Time/Progress Template (SPA_TIME_TMPL) component. To set up time reporting codes, use the Time Reporting Code (SPA_TRC_CODE) component.

To define business purposes, use the Business Purpose (EX_PURPOSE) component.

To set up preferred merchants, use the Preferred Merchant (EX_MERCHANT) component. Use the EX_MERCHANT_SETUP component interface to load data into the tables for this component.

To define expense locations, use the Expense Location (EX_LOCATION) component. Use the EX_LOCATION_SETUP component interface to load data into the tables for this component. To define expense payment type, use the Expense Payment Type (SPA_EXPEND_MTHD) component. To define expense types, use the Expense Type (SPA_EXPENSE_TYPE) component.

To define expense distance rates, use the Distance Rates (EX_AUTO_RT_TBL) component. Use the EX_AUTO_RATE_SETUP component interface to load data into the tables for this component.

This section discusses how to:

- Maintain time reporting codes.
- Create time reporting rules.
- Maintain the service time/progress template.
- Define expense distance rates.
- Define expense types.
- Defining additional expense types.
- Define payment terms timing codes.

- Define single payment terms.
- View where payment terms are used.
- Calculate example data for single payment terms.
- Define multiple payment terms.
- Calculate example data for multiple payment terms.
- Define the accounts payable interface.

Common Elements Used in this Section

Return to Time and Expense Setup Click this link to return to the Time and Expense home page.

Pages Used to Maintain Settlement Setup

Page Name	*Definition Name*	*Navigation*	*Usage*
Shift	SPB_SHIFT	Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Shifts	Define shifts to be used on timesheets. **Note.** This page appears only if the Enable Shifts check box is selected on the Services Procurement Business Unit Definition page.
Assignment	SPB_ASSIGNMENT	Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Assignments	Define assignments to be used on timesheets. **Note.** This page appears only if the Enable Assignments check box is selected on the Services Procurement Business Unit Definition page.

Page Name	*Definition Name*	*Navigation*	*Usage*
Services Procurement Business Unit Definition	BUS_UNIT_TBL_SP	• Set Up Financials/Supply Chain, Business Unit Related, Services Procurement, Services Procurement Options • Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Defn	Select the check boxes to enable the business units to use shifts, assignments, and time category overrides.
Shifts by Service	SPB_SHFT_BY_SRV	Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Shifts by Service	View and modify valid shifts that are associated with a specific service.
Assignments by Service	SPB_ASGN_BY_SRV	Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Assignments by Service	View or modify assignments that are associated with a specific service.
Shift by Service Service by Shift Assignment by Service Service by Assignment	QRY_QUERY	Reporting Tools, Query, Query Manager	Use this page to select the query name for which you want to run these PSQUERY reports: • Shift by Service • Service by Shift • Assignment by Service • Service by Assignment
Service Time/Progress Template	SPA_TIME_TMPL_PG	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Service Time/Progress Template • Set Up Financials/Supply Chain, Product Related, Services Procurement, Time and Expense, Service Time/Progress Template	Create services templates. Enter or modify options used in a timesheet to enter time and expense information and progress information.

Page Name	*Definition Name*	*Navigation*	*Usage*
Select ChartFields	SPA_TIME_TMPL_DIST	Click the Select ChartField link on the Service Time/Progress Template page.	Select the ChartFields to display on the Timesheet. The values from the selected ChartFields will be used to allocate time on Distribution lines. **Note.** This option is only available when you select Actual Allocation as your time reporting option.
Services Time Reporting Codes	SPA_TRC_CODE	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Services Time Reporting Codes • Set Up Financials/Supply Chain, Product Related, Services Procurement, Time and Expense, Services Time Reporting Codes	Define time reporting codes.
Pay Types by Time Reporting Codes	SPA_TRC_PAYTYPE	Click the Pay Types link on the Services Time Reporting Codes page.	Enter and view pay types that are associated with time reporting codes. Use this page to indicate the pay rate and mark up rates that are used on the work order. **Note.** This option is only available when pay types are used.
Time Reporting Rule	SPA_TIMERPT_RUL	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Time Reporting Rule • Set Up Financials/Supply Chain, Product Related, Services Procurement, Time and Expense, Time Reporting Rule	Define rules for reporting time.

Page Name	*Definition Name*	*Navigation*	*Usage*
Business Purpose	EX_PURPOSE	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Expense Business Purpose • Set Up Financials/Supply Chain, Product Related, Expenses, Purchase, Business Purpose	Use business purposes to justify a business expense as a corporate tax deduction.
Distance Rate	EX_AUTO_RT_TBL	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Expense Distance Rate • Set Up Financials/Supply Chain, Product Related, Expenses, Management, Distance Rate	Define expense distance rates.
Expense Types - Expense Types1	SPA_EXPENSE_TYPES1	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Expense Type • Set Up Financials/Supply Chain, Product Related, Services Procurement, Time and Expense, Expense Type	Define expense types.
Expense Types - Expense Types2	SPA_EXPENSE_TYPES3	Click the Expense Types2 tab from the Expense Types1 page.	Define expense types.

Page Name	*Definition Name*	*Navigation*	*Usage*
Expense Payment Type	SPA_EXPEND_MTHD	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Expense Payment Type • Set Up Financials/Supply Chain, Product Related, Services Procurement, Time and Expense, Expense Payment Type	Create payment types that show (on an expense sheet) how an expense item was paid.
Expense Location	EX_LOCATION	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Expense Location • Set Up Financials/Supply Chain, Product Related, Expenses, Location, Expense Location	Create an expense location that can be required on an expense sheet. When you define an expense type, you can require a service provider to enter the location for the transaction to ensure that the cost accurately reflects prevailing prices for that region.
Preferred Merchant	EX_MERCHANT	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Preferred Merchant • Set Up Financials/Supply Chain, Product Related, Expenses, Purchase, Preferred Merchant	Define a preferred merchant that you can include in an expense type. When you define an expense type, you can require a service provider to enter the preferred merchant for that transaction to ensure that the cost accurately reflects prevailing prices for that region.
Payment Terms Timing Codes	PYMT_TERMS_TIMING	• Services Procurement, Define Services Procurement, Settlement Setup, Invoicing Setup, Payment Terms Timing Codes • Set Up Financials/Supply Chain, Product Related, Procurement Options, Payments, Payment Terms Timing Codes	Define payment terms timing for each period that you reference in your payments.

Page Name	*Definition Name*	*Navigation*	*Usage*
Payment Terms - Single Payments	PYMT_TERMS_SINGLE	• Services Procurement, Define Services Procurement, Settlement Setup, Invoicing Setup, Payment Terms - Single Payment • Set Up Financials/Supply Chain, Product Related, Procurement Options, Payments, Payment Terms - Single Payment	Define valid payment terms for single payments.
Search Where Used	SNGL_TRMS_WHR_USED	Click the Search Where Used link on the Payment Terms - Single Payments page.	View where payment terms are used.
Calculate Example Payment Data (single payment terms)	SNG_TR_CLC_PAY_DTA	Click the Calculate Example Payment Data link on the Payment Terms - Single Payments page.	Calculate example data for single payment terms.
Payment Terms - Multi Payment	PYMT_TERMS_MULTI	• Services Procurement, Define Services Procurement, Settlement Setup, Invoicing Setup, Payment Terms - Multi Payment • Set Up Financials/Supply Chain, Product Related, Procurement Options, Payments, Payment Terms - Multi Payment	Define valid payment terms for multiple payments.
Calculate Example Payment Data (multiple payment terms)	MLT_TR_CLC_PAY_DTA	Click the Calculate Example Payment Data link on the Payment Terms - Multi Payment page.	Calculate example data for multiple payment terms.

Page Name	*Definition Name*	*Navigation*	*Usage*
Accounts Payables Interface	SPA_AP_INTRFACE	• Services Procurement, Define Services Procurement, Settlement Setup, Invoicing Setup, Accounts Payables Interface • Set Up Financials/Supply Chain, Product Related, Services Procurement, AP Interface	Define accounts payable application interface information.

Maintaining Time Reporting Codes

Access the Services Time Reporting Codes page (Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Services Time Reporting Codes).

Multiplication Factor Define the multiplication factor for the TRC. The system uses the value that you enter when calculating time and expense amounts.

Note. This factor is applied in addition to any applicable shift or assignment pay rate. In addition, for assignment pay, the assignment pay rate must be Based on Time.

Pay Types Associate pay types with time reporting codes. Available only if pay types are enabled on the Services Procurement Installation Options page.

Pay Types by TRC

To access the pay types by TRC, click the Pay Types link on the Services TRC component.

Use pay types by TRC to determine how you pay the supplier. For example, you can have an agreement that you pay all pay types (pay rate, fixed cost, third-party markup, vendor markup) for hours 0 - 8. After 8 hours you might only pay the pay rate and fixed cost but no markups. In this case, you would create two TRCs, one with all 4 pay types and one with only pay rate and fixed cost. You would then create a services time template with overtime enabled. On the overtime rules, you would use the two new TRCs that you created.

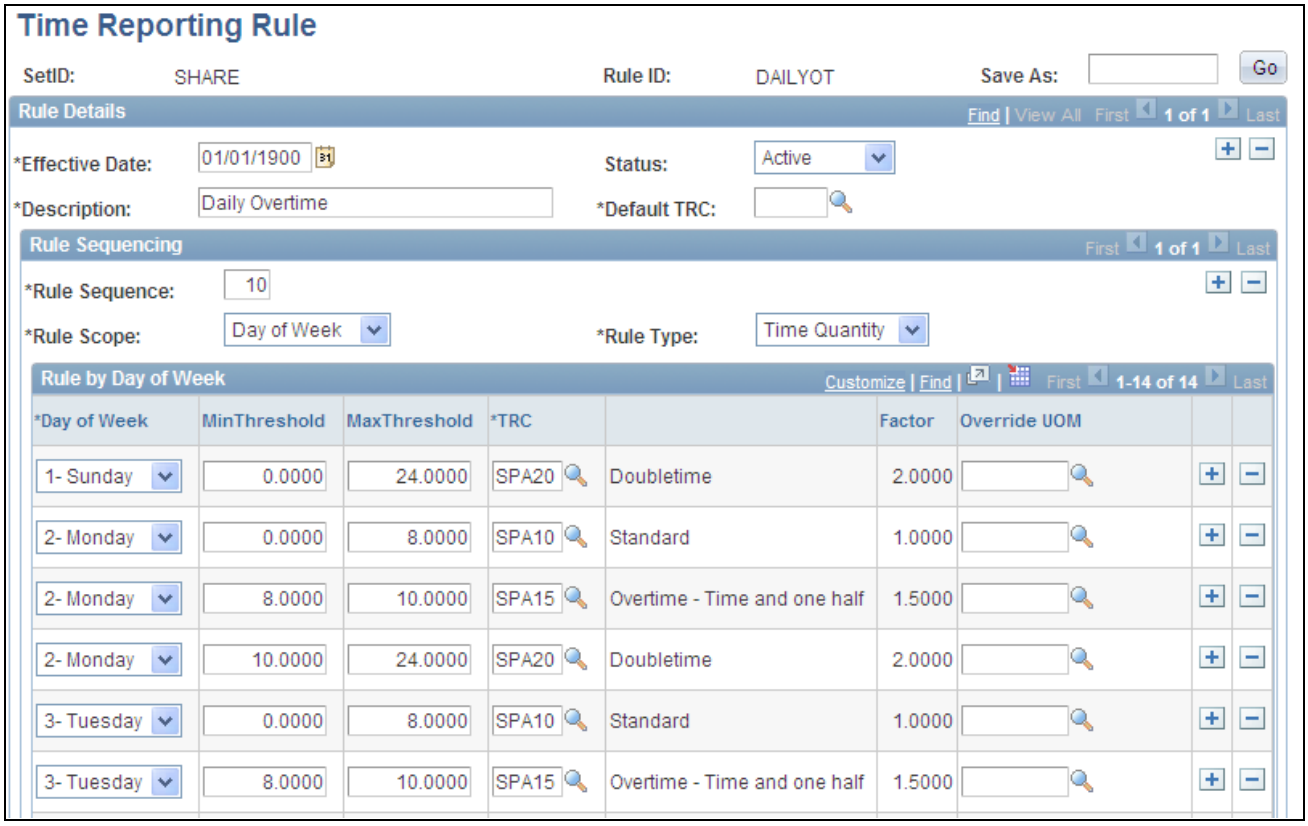
You can select up to 4 pay types on this page, but each pay type can only be defined once.

Pay Type Select the pay type you are to pay to the supplier

Multiplication Factor Select the multiplication factor for the pay type. The value appears by default from the Services TRC multiplication factor, but you can override the value.

Creating Time Reporting Rules

Access the Time Reporting Rule page (Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Time Reporting Rule).



Time Reporting Rule page

Rule Details

Description Enter a long description to identify the time reporting rule.

Default TRC (default time reporting code) Select a default TRC to use when the time reporting rule does not meet the rule criteria.

Rule Sequence

Rule Sequence

Enter a rule sequence number. This value is used to determine the order the system validates and applies the rule criteria to a timesheet. Since the rule sequence numbers are incremental, be sure to prioritize the rule in the order in which you want the system to evaluate and validate the TRC codes to use for time reporting.

Note. Always identify the most important rules at the lowest rule sequence to ensure that the system picks up those rules first. If you define a priority rule at higher sequence number and the system validates another rule that qualifies at a lower sequence number, the system uses the lowest rule sequence to populate the timesheet.

For example, if you create a rule with specific capture dates (as in the case of holidays), always be sure to define those dates first. The system starts at the most current rule sequence and works its way down the list. Also, if you want to be sure that there is always a valid rule in place, identify the "catch-all" rule as the last rule in the sequence. That way, you are always sure that there is a valid rule in the sequence.

Rule Scope

Select the time scope that this rule sequence covers.

Values include *Date,Day of the Week,* and *Time Period.*

Rule Type

Select the type for this rule sequence.

Values include *Time Quantity* and *TRC List.*

Rules by Date

Date

Enter the date for which this rule applies.

Min Threshold (minimum threshold)

Enter minimum quantity of hours for this rule.

Max Threshold (maximum threshold)

Enter the maximum quantity of hours fro this rule.

TRC (time reporting code)

Select a value to use with this time reporting rule.

Override UOM (override unit of measure)

Select an alternative UOM to use as an override on the work order. Use this UOM to calculate a different rate on the work order.

Blackout

Select to prevent time from being entered for the specified day.

Note. This option is only available for the rule type of TRC List.

Rules by Day of the Week

Day of Week

Enter a day of the week to create a time reporting rule.

Values include:

- *Sunday*
- *Monday*
- *Tuesday*
- *Wednesday*
- *Thursday*
- *Friday*
- *Saturday*

Rules by Time Period

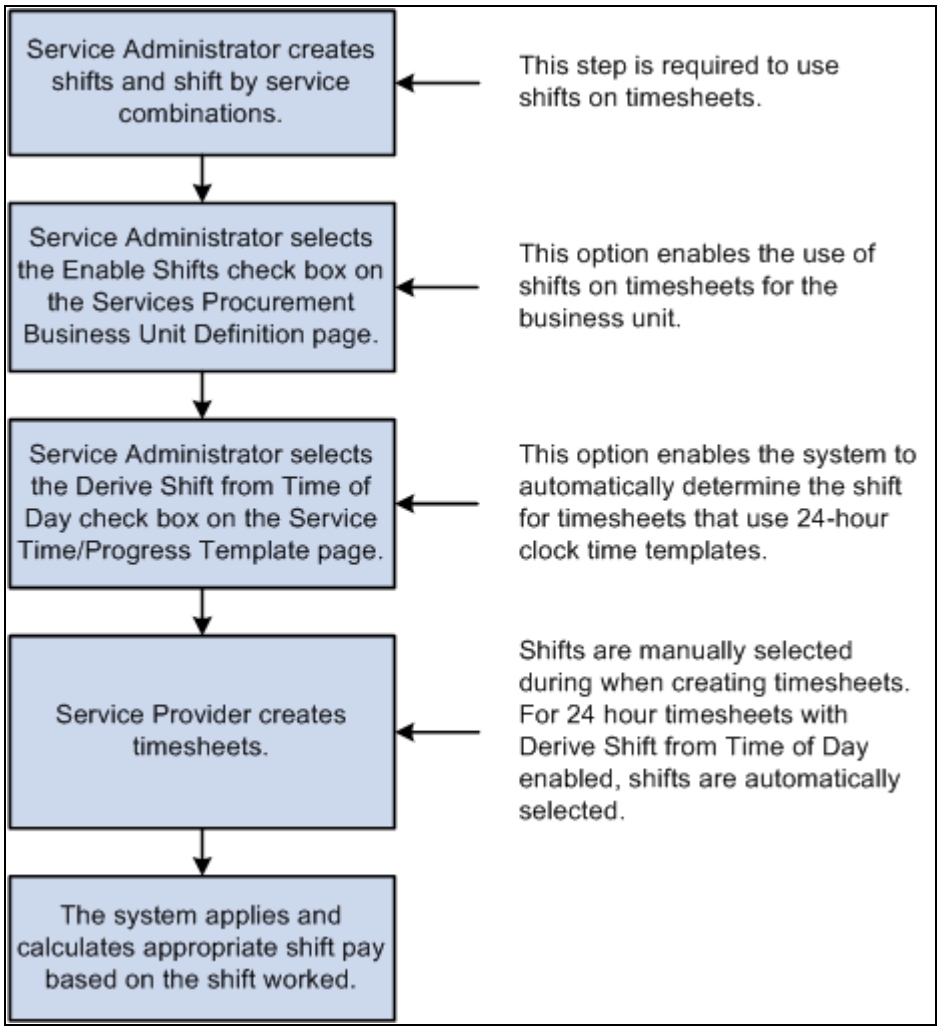
Time Period

Enter a time period to create a time reporting rule.

Values include *Bi-Monthly*,*Daily*,*Monthly*,*Semi-Monthly*, and *Weekly*.

Using Shifts on Timesheets

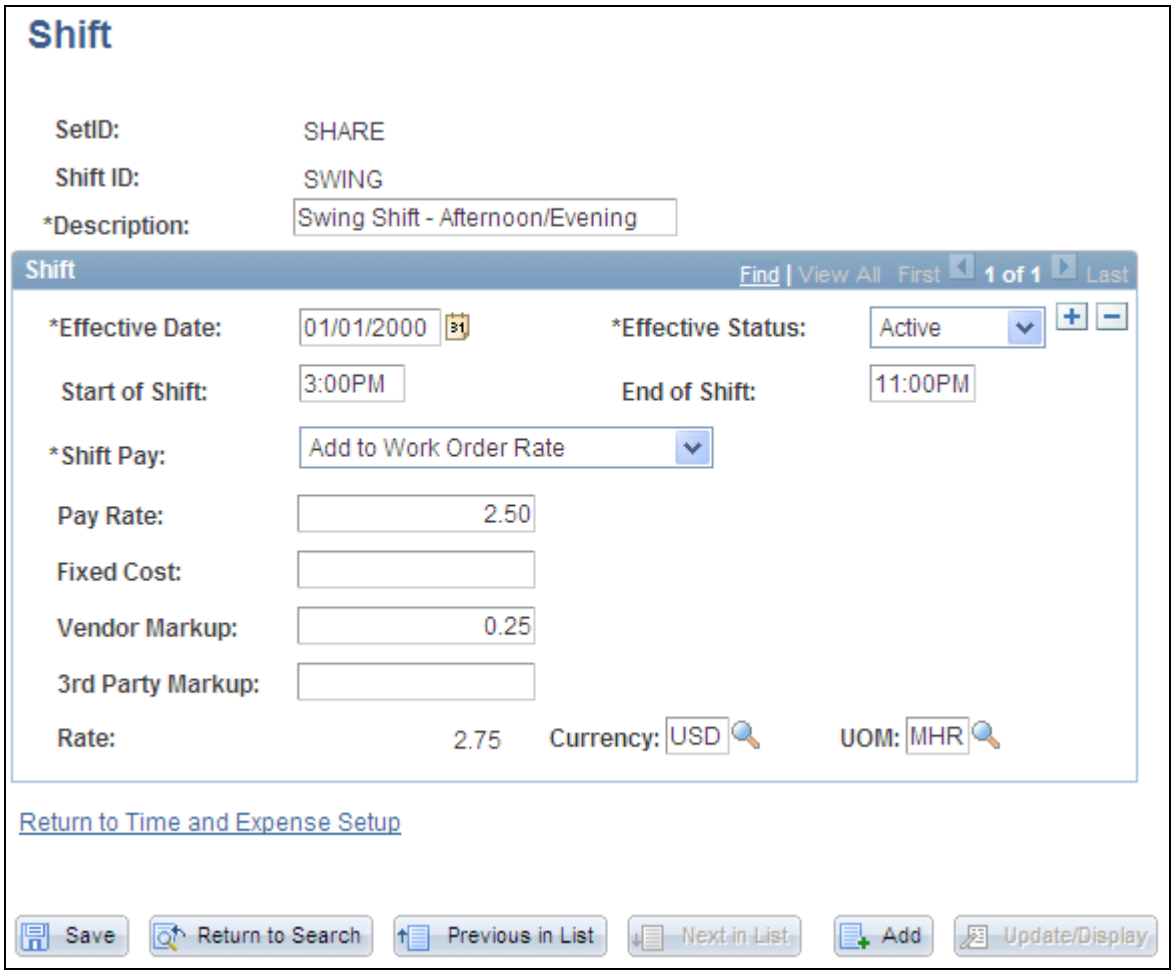
The following diagram illustrates the steps involved in defining shifts that can be used on timesheets:



Shifts Definition

Defining Shifts for Use on Timesheets

Access the Shift page (Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Shifts).



Shift page

Note. These settings are defined at the setID level.

Note. The fields that appear on this page depend upon the value selected for the Shift Pay field.

Note. The Document Service and Service Type labels will differ if Enterprise Human Capital Management is installed.

SetID Select the setID that will be able to use this shift.

Shift ID Enter a name for the shift.

Description Enter a description for the shift. This is a required field.

Effective Date Enter the date that the shift will become effective. The current date is the default value. This is a required field.

Add effective-dated rows for each Shift Pay type as required.

Effective Status

Select *Active* (default) or *Inactive*. This determines if this shift will be available for use on timesheets. Only shifts with a status of Active will be available for use. This is a required field.

Note. If you change an Active shift to Inactive, the system will issue a warning message if there are any existing shift and service combinations for the effective-dated shift.

Shift Start Time and **Shift End Time**

(Optional) Enter the start and end times for the shift. Shift pay is paid for work performed during this time period. You can leave this blank and the system will automatically select the shift based on the start and end times entered on the timesheet.

Note. Start and stop times are for informational purposes only. If the 24-hour clock time template is used and the Derive Shift Based From Time of Day option is selected, then the system automatically populates the default time values in this fields. However, these start and stop times can still be modified at the template definition level.

Shift Pay

Select a value to indicate the basis for the shift pay calculation:

- *Add to Work Order Rate:* Shift pay is added to the work order rate for this shift.
- *Add % of Work Order Rate:* Shift pay is defined as a percentage of the work order rate.

  You must enter percentage rate in the Shift Percent field.
- *Substitute Work Order Rate:* Shift pay rate will replace the work order rate for this shift.

This is a required field.

Shift Pay Rate Percentage

Enter a negative or positive percent value for the shift pay rate. This is a required field and is used with the *Add % of Work Order Rate* value.

Shift Pay Rate Amount

Enter a negative or positive amount. If pay types are not selected, then this is a single rate. If pay types are selected, this rate must be broken out into the Pay Rate, Fixed Cost, Vendor Markup, and Third-Party Markup fields that appear. This is a required field and is used with the *Add to Work Order Rate* or *Substitute Work Order Rate* values.

Shift Pay Rate Currency

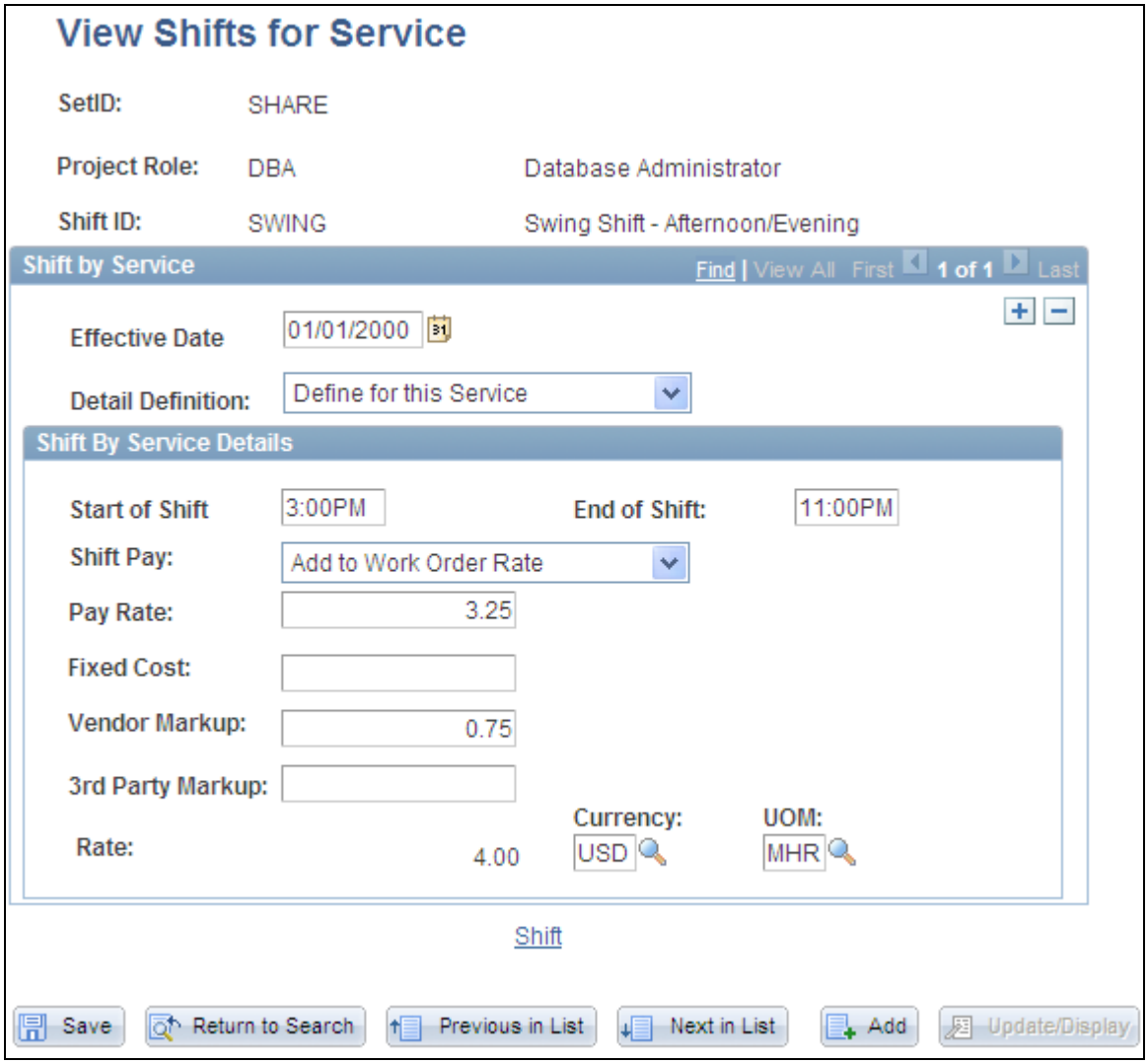
Enter the currency code for this shift pay rate. This field works with the *Add to Work Order Rate* or *Substitute Work Order Rate* values.

Shift Pay Rate UOM (unit of measure)

Enter the unit of measure for this shift pay rate. This field works with the *Add to Work Order Rate* or *Substitute Work Order Rate* values.

Defining Shifts by Service

Access the Shifts for Service page (Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Shifts by Service).



Shifts for Service page

Note. These settings are defined at the setID level.

This page identifies the shifts that are valid for a particular service. Only shifts associated to the service can be associated to time reported against a work order for that service. In addition, for 24-hour clock time entry, only shifts that are associated to the time template can be associated to the time reported.

Shift by Service Details

Project Role Select a value for this service (job) code.

Shift ID Select the shift to be associated with this service.

Effective Date Enter the effective date for this service. This is a required field.

Detail Definition Select a method to use for defining details of the shift. Values are:

- *Define for Service:* Indicates that the shift is available for use with this service as of the effective date.

  The service and shift combination will have specific times and rates defined.

  Note. The Description group box appears when you select this option.

- *No Longer Valid for Service:* Indicates that the shift is no longer available for use as of the effective date.
- *Use Shift Definition:* Indicates that the shift is available for use with the service as of the effective date.

  The shift times and rates from the Shift Definition will be used for this service.

Description

Start of Shift and **End of Shift** (Optional) Enter the beginning and ending times for the shift.

Note. Start and stop times are for informational purposes only. If the 24-hour clock time plate is used and the Derive Shift Based From Time of Day option is selected, then the system automatically places default time values on this fields. However, these start and stop times can still be modified at the template definition level.

Shift Pay The default values come from the Shift definition page but you can modify it here. Values are:

- *Add to Work Order Rate:* Shift pay rate will be added to the work order rate for this shift by service.
- *Add % of Work Order Rate:* Shift pay is defined as a percentage of the work order rate.
- *Substitute Work Order Rate:* Shift pay rate is substituted for the work order rate.

  If you select this option, can only enter a positive amount in the Pay Rate field.

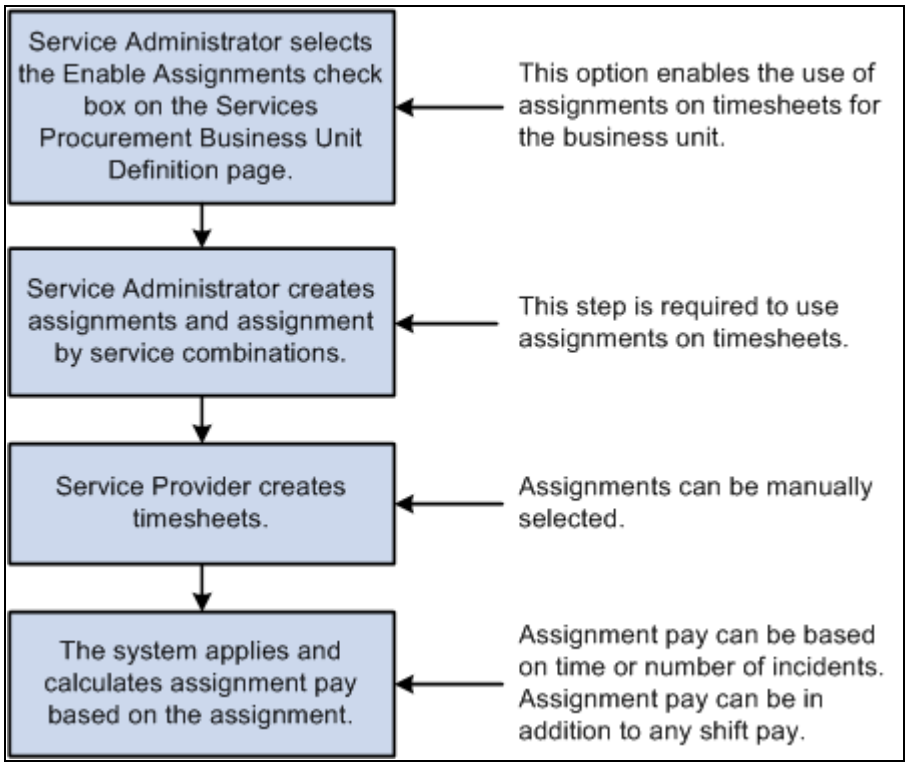
Pay Rate	This required field is available if you select *Add to Work Order Rate* or *Substitute Work Order Rate*.If you selected the Add to Work Order Rate, you must enter a positive or a negative amount in this field, If you selected the Substitute Work Order Rate value, you must enter a positive amount. If pay types are not selected, then this is a single rate. If pay types are selected, this rate must be broken out into the Pay Rate, Fixed Cost, Vendor Markup, and Third-Party Markup fields that appear.
Shift Percent	You must enter a positive or a negative percent in this field if you selected the *Add % of Work Order Rate* value. This is a required field.
Currency	You must enter a value in this field if you selected the *Add to Work Order Rate* or *Substitute Work Order Rate* option.
UOM (unit of measure)	This field is available if you select the *Add to Work Order Rate* or *Substitute Work Order Rate* value. This is a required field.
Shift	Click this link to access the Shift definition page for this specific shift.

See Also

Appendix E, "PeopleSoft Services Procurement Reports," PeopleSoft Services Procurement Reports: General Description, page 715

Using Assignments on Timesheets

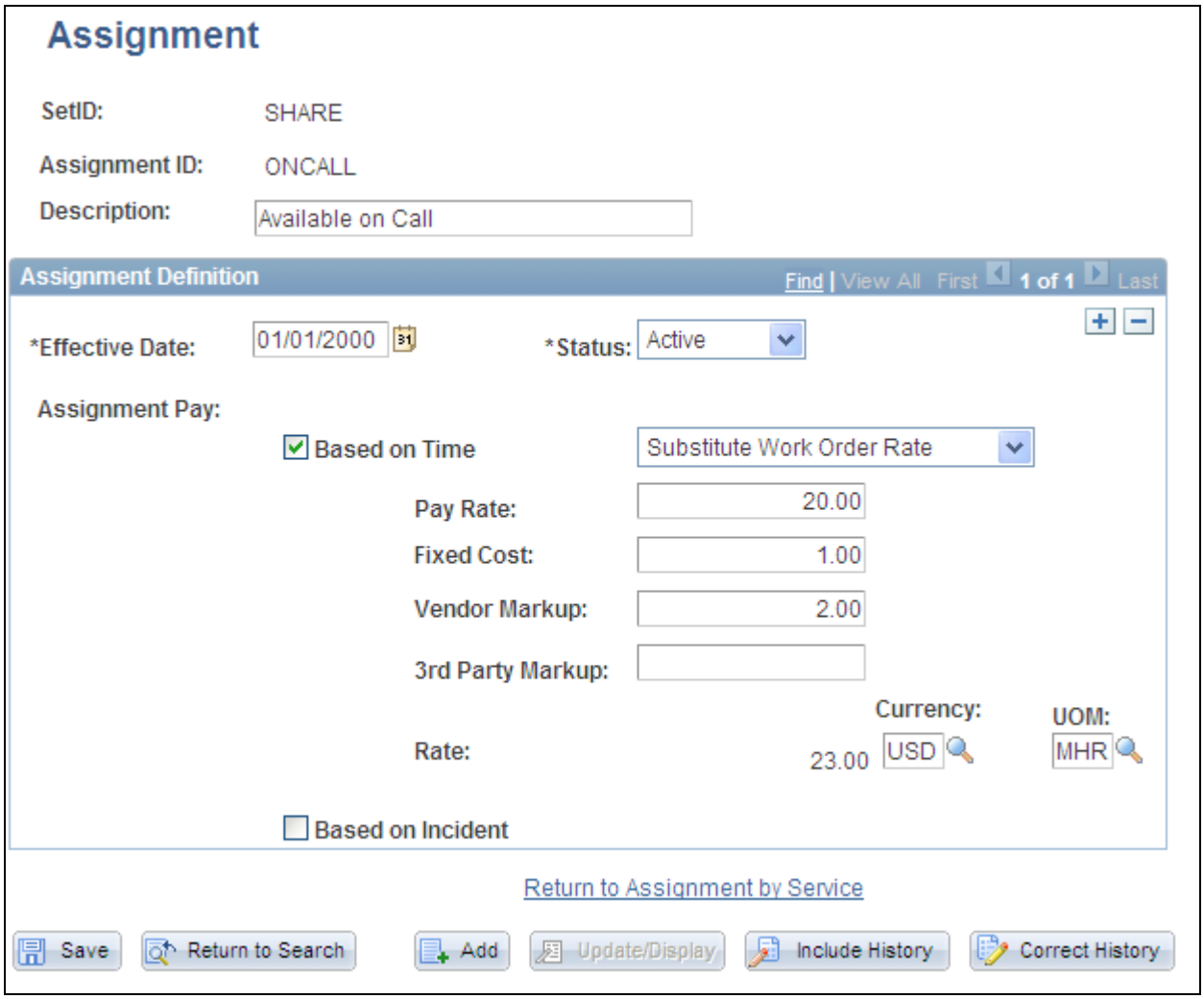
The following diagram illustrates the steps involved to define assignments that can be used on timesheets:



Assignments Definition

Defining Assignments for Use on Timesheets

Access the Assignment page Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Assignments).



Assignment page

Note. These settings are defined at the setID level.

Note. The fields that appear on this page depend upon the value selected for the Assignment Pay field.

SetID Select the setID that will be able to use this assignment.

Assignment ID Enter a name for the assignment.

Description Enter a description for the assignment.

Assignment Definition

Effective Date Enter the date that the assignment will become effective. The current date is the default value. This is a required field.

Add effective-dated rows for each Assignment Pay type as required.

Status

Select *Active* (default) or *Inactive.* This determines if this assignment will be available for use on timesheets. Only assignments with a status of Active will be available to associate with services or on timesheets. This is a required field.

Note. If you change an Active assignment to Inactive, the system will issue a warning message if there are any existing assignment and service combinations for the effective-dated assignment.

Assignment Pay

Select the value on which the assignment pay calculation should be based. Values are Based on Time or Based on Incident.

- Based on Time: This option indicates that some or all of the assignment rate is based on the time spent on the assignment.
- Based on Incident: This option indicates that some or all of the assignment rate is based on the number of incidents for the assignment.

If you select Based on Time, select a value as the basis for time associated with the assignment:

- *Add to Work Order Rate:* The assignment rate will be added to the work order rate.

  If you select this option, you must enter a negative or a positive value in the Pay Rate field that appears.

  Note. If pay types are not enabled, this is a single rate. If pay types are enabled, the Pay Rate must be broken out into the Pay Rate, Fixed Cost, Vendor Markup, and 3rd Party Markup fields that appear on the page.

- *Add % of Work Order Rate:* The assignment rate is a percent of the work order rate.

  If you select this option, you must enter a negative or positive value in the Percent field.

- *Substitute Work Order Rate:* The assignment rate will replace the work order rate.

  If you select this option, you must enter a positive value in the Pay Rate field.

  Note. If pay types are not enabled, this is a single rate. If pay types are enabled, the Pay Rate must be broken out into the Pay Rate, Fixed Cost, Vendor Markup, and 3rd Party Markup fields that appear on the page.

Rate

This display-only field shows the total of the Pay Rate, Fixed Cost, Vendor Markup, and 3rd Party Markup fields.

Currency

Enter the currency associated with the assignment pay rate. This field is available if you select the *Add to Work Order Rate* or *Substitute Work Order Rate* option.

UOM (unit of measure) Enter the unit of measure associated with the assignment pay rate. This field is available if you select the *Add to Work Order Rate* or *Substitute Work Order Rate* option.

If you select Based on Incident, you must break down the assignment pay amount into these fields.

Note. The total of these fields should add up to the total assignment pay amount.

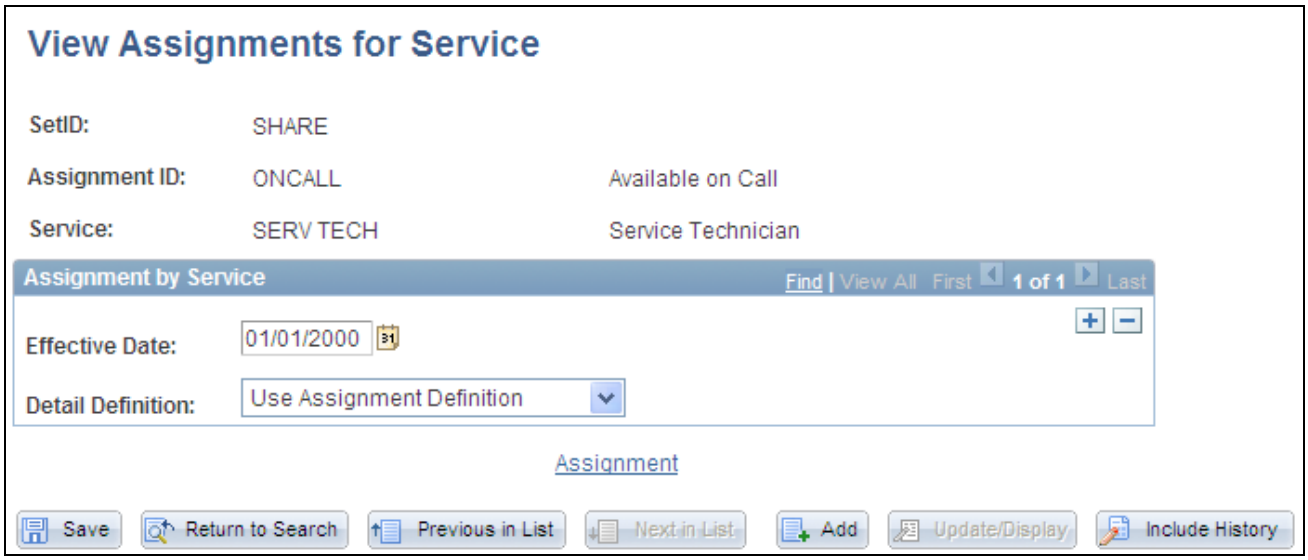
- Pay Rate
- Fixed Cost
- Vendor Markup
- 3rd Party Markup

Rate This display-only field shows the total of the Pay Rate, Fixed Cost, Vendor Markup, and 3rd Party Markup fields.

Currency The value in this display-only field comes from the assignment currency.

Defining Assignments by Service

Access the Assignments by Service page (Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Assignments by Service).



Assignments by Service page

Note. These settings are defined at the setID level.

Assignment ID Enter a description for this assignment by service.

Service Enter the service code.

Assignment by Service

Effective Date Enter the effective date for this service. This is a required field.

Detail Definition Select a method to use for defining details of the assignment by service combination. Values are:

- *Define for Service:* Indicates that the assignment is available for use with this service as of the effective date.

  The service and assignment combination will have specific times and rates defined.

  Note. The Description group box appears when you select this option.

- *No Longer Valid for Service:* Indicates that the assignment is no longer available for use as of the effective date.
- *Use Assignment Definition:* Indicates that the assignment is available for use with the service as of the effective date.

  The shift times and rates from the Assignment definition page will be used for this service.

Description

Assignment Pay Select the method on which to base the assignment pay. Values are:

- Based on Time: Assignment pay will be based on the beginning and end times of the assignment.

  You can select one of these values to calculate the assignment pay:

  - *Add to Work Order Rate:* Assignment pay rate will be added to the work order rate for this assignment by service combination.
  - *Add % of Work Order Rate:* Assignment pay is defined as a percentage of the work order rate.
  - *Substitute Work Order Rate:* Assignment pay rate is substituted for the work order rate.

    If you select this option, can only enter a positive amount in the Pay Rate field.

- Based on Incident: The assignment pay will be based on the number of incidents.

  If you select this option, you must enter values for the Pay Rate, Fixed Cost, Vendor Markup, and Third-Party Markup fields.

Pay Rate	This required field is available if you select *Add to Work Order Rate* or *Substitute Work Order Rate.* If you selected the Add to Work Order Rate, you must enter a positive or a negative amount in this field, If you selected *Substitute Work Order Rate,* you must enter a positive amount. If pay types are not selected, then this is a single rate. If pay types are selected, this rate must be broken out into the Pay Rate, Fixed Cost, Vendor Markup, and Third-Party Markup fields that appear.
Percent	You must enter a positive or a negative percent in this field if you selected the *Add % of Work Order Rate* value. This is a required field.
Currency	You must enter a value in this field if you selected the *Add to Work Order Rate* or *Substitute Work Order Rate* option.
UOM (unit of measure)	This field is available if you select the *Add to Work Order Rate* or *Substitute Work Order Rate* value. This is a required field.
Assignment	Click this link to access the Assignment definition page for this specific assignment.

Enabling the Use of Shifts and Assignments

Access the Services Procurement Bus Def (business unit definition) page (Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Defn).

Time and Expense Settings

Enable Shifts	Select this check box if you want to use shifts on timesheets.
Enable Assignments	Select this check box if you want to use assignments on timesheets.
Enable Time Category Override	Select this check box if you want to enable time category overrides.

See Also

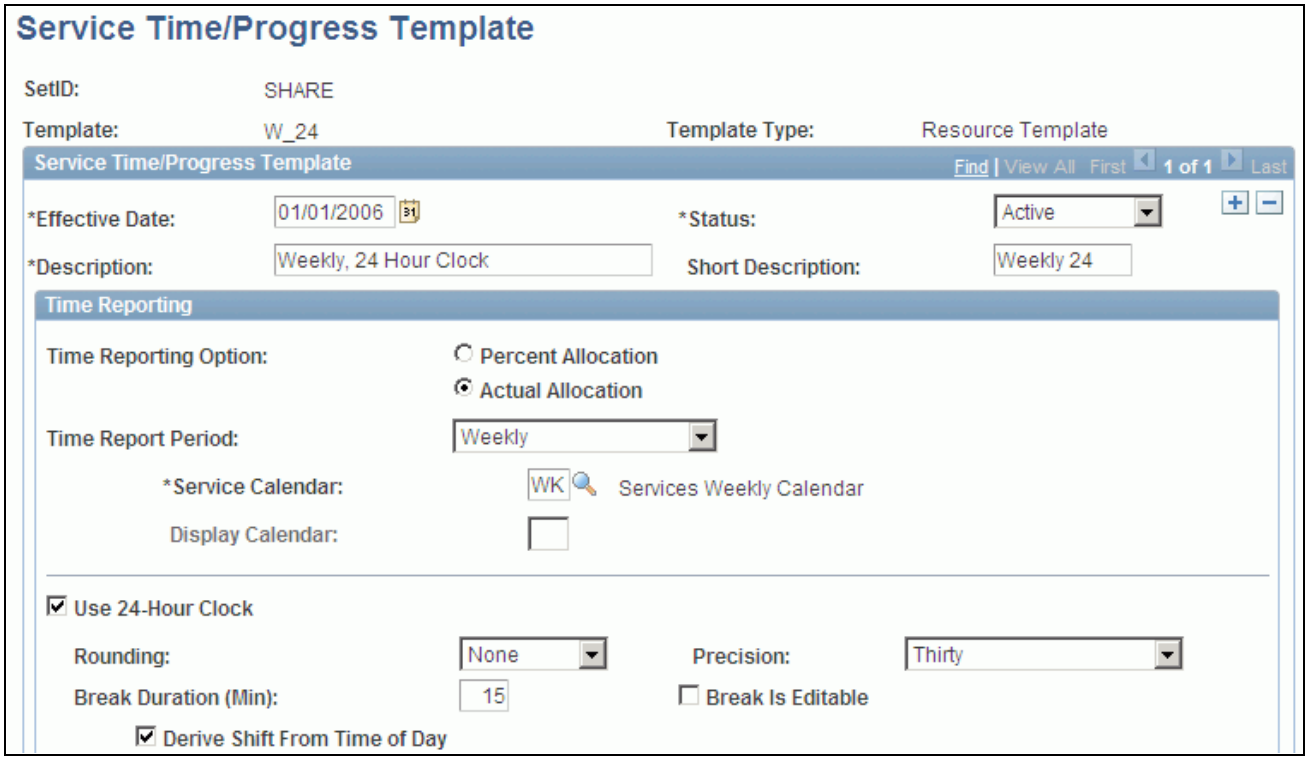
Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Defining Shifts for Use on Timesheets, page 181

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Defining Assignments for Use on Timesheets, page 187

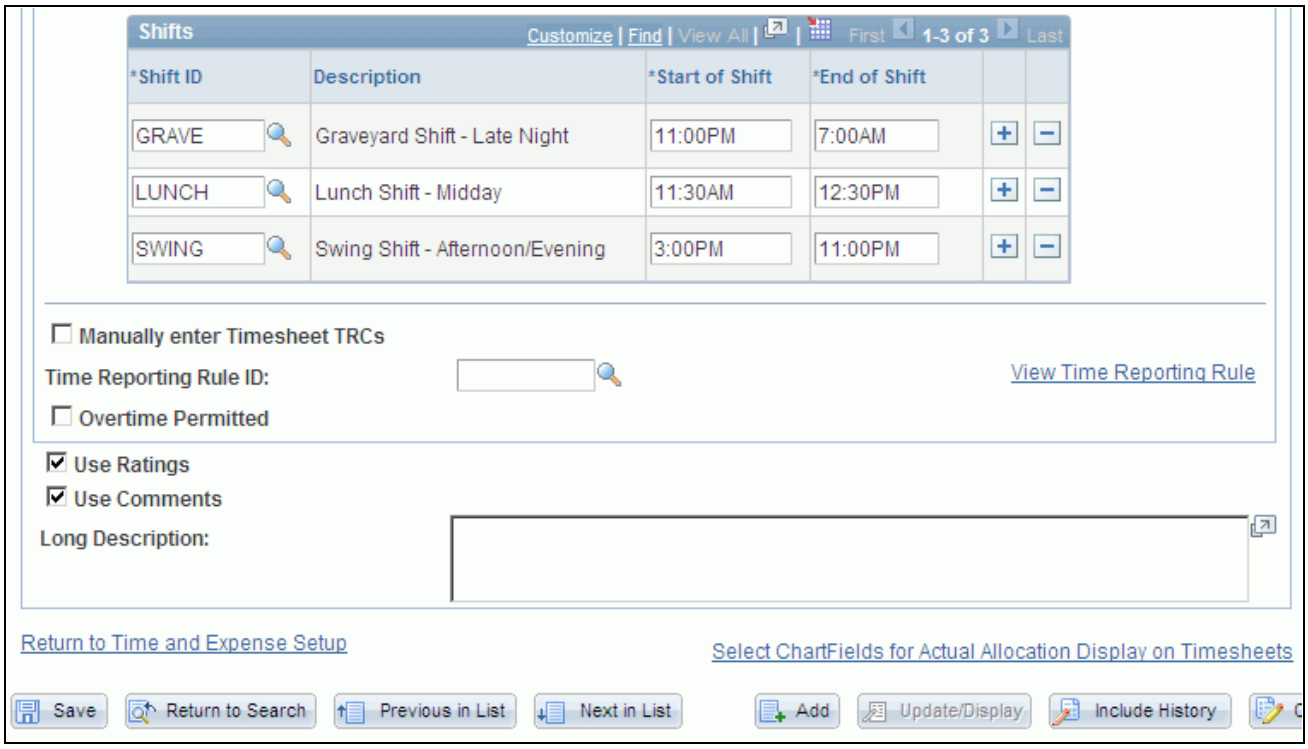
Chapter 19, "Managing Time in PeopleSoft Services Procurement," Editing Time Categories on Timesheets, page 507

Maintaining the Service Time/Progress Template

Access the Service Time/Progress Template page (Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Service Time/Progress Template).



Service Time/Progress Template page (1 of 2)



Service Time/Progress Template page (2 of 2)

If a timesheet has been created using a service time/progress template, the system displays a message on the template page. The message indicates that the template has been used in the creation of a timesheet and that some fields for effective-dated rows have been disabled. The system also makes the Status and Time Reporting Option fields unavailable on the page when a work order has been created against the time template.

Time Reporting

Time Reporting Option

Use this option to determine whether a resource based work order requires the service provider to report time against specific ChartFields, or whether the total time is entered and distribution percentages automatically split time or progress according to the ChartField distribution defined for the work order. Values are:

- *Actual Allocation:* Select to enable the service provider to report actual time against each ChartField distribution line defined on the work order.
- *Percent Allocation:* Select to enable the service provider or service provider contact to report total time or progress against a work order.

  The distribution percentage is used to automatically allocate time or progress across the predefined ChartField distribution lines.

Time Reporting Period

Select a period that indicates how often service providers enter their work hours. The default value is *Weekly*. Other values are *Daily,Bi-Weekly,Semi-Monthly,* and *Monthly*.

Note. When you select a the monthly time reporting option, the Display Calendar field is editable. You must select a display calendar to chunk monthly reporting properly.

Service Calendar

Select a service calendar for the time reporting period. Use this calendar as a detail for how the organization reports time during the calendar year. Values are:

- *Bi-Weekly*
- *Daily*
- *Monthly*
- *Semi-Monthly*
- *Weekly*

Display Calendar

Select an appropriate calendar display option.

Use this option to determine how the calendar is displayed for the time reporting period. For example, if you select Monthly as the time reporting option, you may want to display the calendar on a weekly basis.

Use 24-Hour Clock

Select this option if you want time logged using the 24-hour clock. You select this check box if you want to pay providers shift differential using shifts.

If you select to use a 24-hour clock, the system disables other entry fields.

Rounding

Select whether you want to round up or down to the hour. Select *None* if you do not want to round the minutes.

Precision

Select the number of precise minutes for rounding. Values are *Six,Twelve, Fifteen,Twenty,* and *Thirty*.

Break Duration (Mins) (break duration - minutes)

Enter the break duration in number of minutes. The break duration is subtracted from the total time difference between the start and end dates. For example, if you have a start time of 8:00 a.m. and end time of 5:00 p.m. with a 30-minute break duration, 8.5 hours are recorded for the day.

Break is Editable

Select to indicate that the break is not mandatory.

Derive Shift From Time of Day

Select this option if you want the system to automatically derive the shift depending upon the time of day. This option is used with 24-hour clocks only. You use the Derive Shift From Time of Day check box in conjunction with the shift and assignments functionality.

Shifts

This group box appears when you select Derive Shift From Time of Day. Use this group box to associate specific shifts with this time service template.

Note. Start and stop times are for informational purposes only. If the 24-hour clock time plate is used and the Derive Shift Based From Time of Day option is selected, then the system automatically places default time values on this fields. However, these start and stop times can still be modified at the template definition level.

Start of Shift and **End of Shift**

These default values come from the Shift definition page, but you can override the values here. These are required fields.

Note. Start and end times cannot fall within the ranges for another shift for the sample template.

Allow for more than 24 hours

Select if a service provider is enabled to enter more than 24 hours for a single project, work order, activity, and day. You can use this option for team reporting instead of individual reporting.

Note. When you select this option, the *Rounding,Default Start Time, Default Stop Time, Break Duration,Precision,* and *Break is Editable* fields are available.

Manually enter TimeSheet TRCs(manually enter timesheet time reporting codes)

Select this check box to indicate that you want to manually enter TRCs for timesheets. The check box controls whether time reporting codes are assigned manually by the service provider during time entry or automatically assigned by the system based on predefined rules. You cannot assign a time-reporting rule to a template if this check box is selected. The Derive Shift From Time of Day check box is available if you do not select to manually enter timesheet TRCs. If you select to manually enter timesheet TRCs, the check box is not available.

Note. When editing an existing time template, you cannot change the setting of the Manually enter Timesheet TRCs check box if there are already timesheets associated to the template. When a template is already in use, the system low-lights entry fields.

Time Reporting Rule ID

Select a time reporting rule to use for calculating different payouts. This field is not available if you select the Manually enter Timesheet TRCs check box.

Note. To use this feature, you must first define the time reporting rules on the Time Reporting Rules page.

View Time Reporting Rules

Click to view the time reporting rule associated with this service template.

Overtime Permitted

Select to indicate if a requisition allows overtime.

This is an informational field only.

Use Ratings

Select if the performance of a service provider during the time period is to be rated.

Note. This check box is only accessible if the Use Ratings check box on the Services Procurement Business Unit Definition page is selected.

Use Comments

Select to enable service providers and provider contacts to enter comments or concerns on the timesheet and progress log.

Select ChartFields for Actual Allocation Display on Timesheets

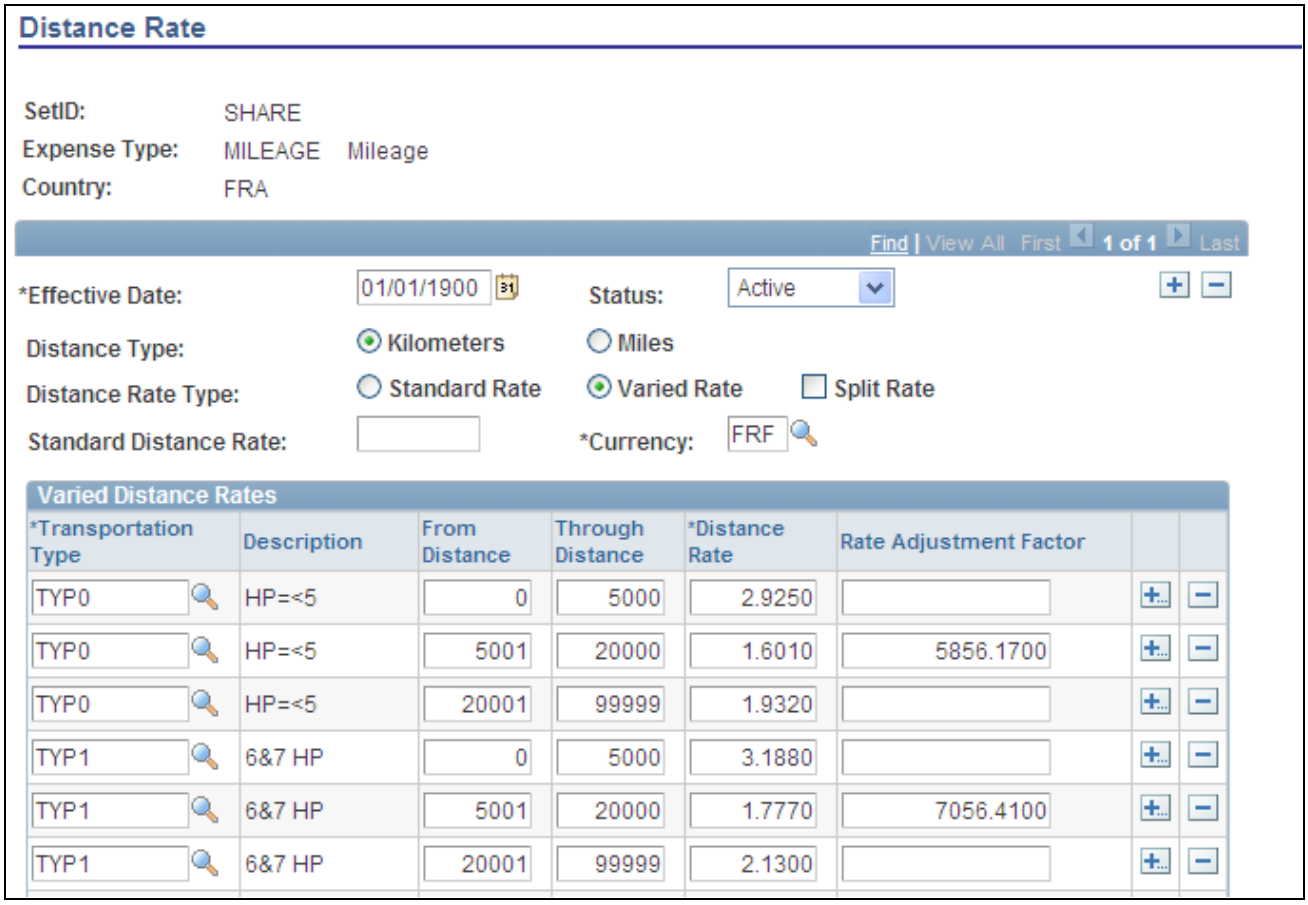
Select the ChartFields to display on the timesheet.

The values from the selected ChartFields will be used to allocate time on distribution lines.

Note. This option is only available when you select Actual Allocation as the time reporting option.

Defining Expense Distance Rates

Access the Distance Rate page (Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Expense Distance Rate).



Distance Rate page

You can set up standard and varied distance rates in different base currencies with each combination tied to an expense type. When service providers use their automobiles for business purposes, you can reimburse them based on how far they must drive.

Distance Rate Type

Select Standard Rate to indicate a uniform reimbursement rate regardless of transportation type.

Select Varied Rate to indicate reimbursement rates that depend on the transportation type.

Standard Distance Rate

Enter the monetary amount that is to be reimbursed per unit driven, if you selected Standard Rate.

Varied Distance Rates

Transportation Type and **Distance Rate**

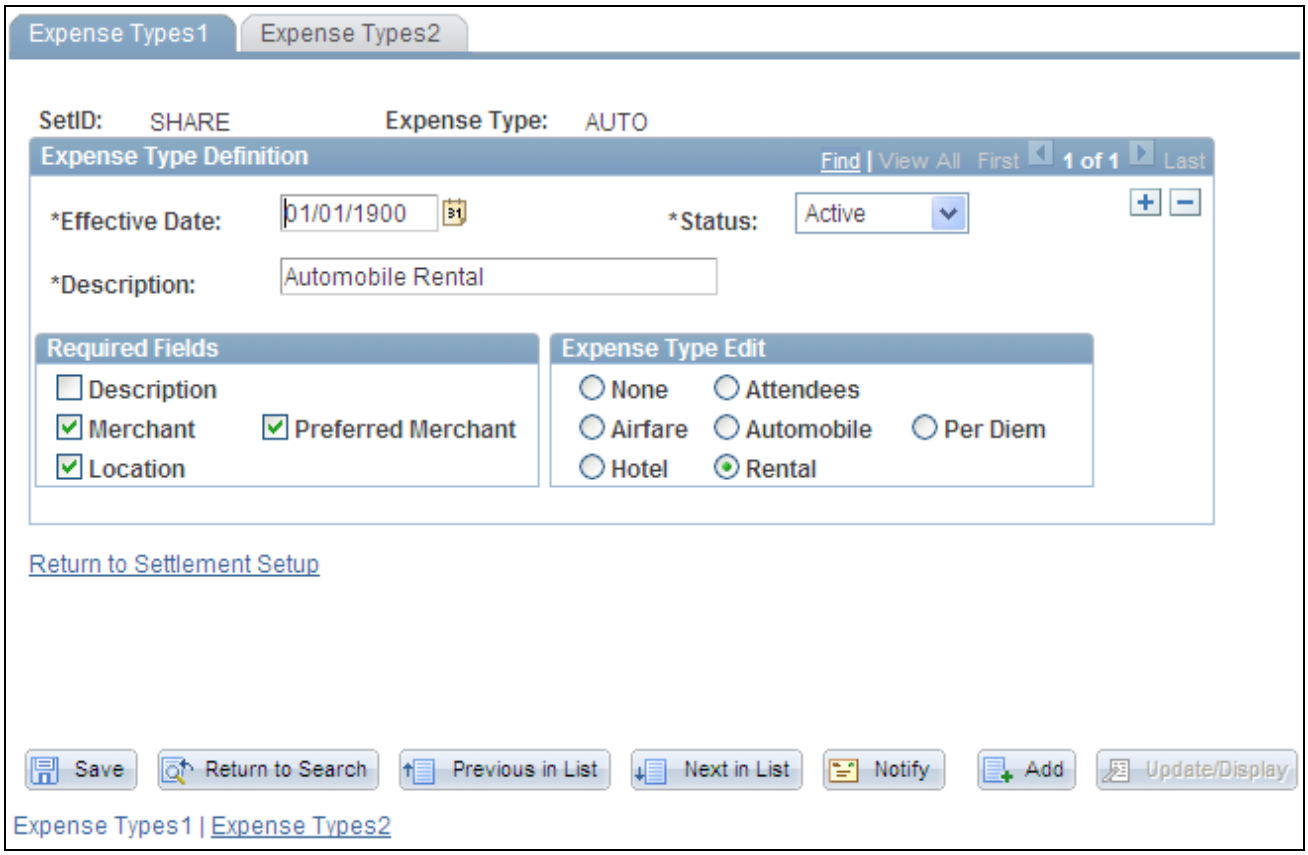
If you selected Varied Rate, enter a distance rate to define the monetary amount that is reimbursed for the transportation type per unit driven.

Rate Adjustment Factor

Enter an adjustment factor that the system applies for the transportation type.

Defining Expense Types

Access the Expense Types1 page (Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Expense Type).



Expense Types1 page

Required Fields

Description, Merchant, Preferred Merchant, and **Location**

Select each option to appear as a required field on the expense sheet that a service provider completes for the expense type.

To define an expense location amount for this expense type, select the Location check box to make it a required field on the expense sheet.

Defining Additional Expense Types

Access the Expense Types2 page (click the Expense Types2 tab from the Expense Types1 page).

Per Diem Amount

Enter the amount that is authorized for this expense type. In the column that appears to the right of this field, select the per diem's currency.

Deduct For Breakfast, Deduct For Lunch, and **Deduct For Dinner**

Enter deduction amounts. The currencies for these amounts appear by default from the currency that you selected for the per diem.

Preferred Merchant You can add more rows to create a list of merchants that service providers must use. If the expense type appears in an expense sheet and the service provider did not use a preferred merchant, the line item requires an explanation.

Defining Payment Terms Timing

Access the Payment Terms Timing Codes page (Services Procurement, Define Services Procurement, Settlement Setup, Invoicing Setup, Payment Terms Timing Codes).

Payment terms are stored in separate tables and form the basis of net due date, discount due date, and discount amount calculations. You define the payment terms and timing methods that the system uses for vendor payments. The system supports percentage and fixed amount discount calculations. PeopleSoft Payables uses these payment terms and timing methods to schedule payments for invoices and to calculate amounts remitted to vendors.

Defining Single Payment Terms

Access the Single Pay Terms page (Services Procurement, Define Services Procurement, Settlement Setup, Invoicing Setup, Payment Terms - Single Payment).

 Click the Refresh Display button if you modified an existing term definition and want to display the original, saved terms definition.

Search Where Used Click to access the Search Where Used page to view where this payment term ID is used.

Calculate Example Payment Data Click to calculate example payment data for the payment terms ID, based on currency, gross amount, and basis date values provided as input variables. This enables you to perform a *what if* analysis regarding the effect of various parameter settings on the calculated result, before choosing to save a particular term's definition.

Payment Terms Control

Terms Applicability Displays *Vendor-Only Terms.*

Split Net Terms Select to enable a definition of payment terms that contain multiple net terms and any associated discounts. For example, select this option to use one timing ID if the basis date is between the 1st and 15th, and another timing ID if the basis date is between the 16th and end of the month. Split terms definitions enable you to set up *variable net due date* terms. There are terms that, depending on the basis date, result in more than one possible set of net or discount due dates.

Net Due Terms

Basis From Day Enter the beginning day of the basis day range. The basis date's day value must be equal to or greater than this day or else the terms definition does not apply. This field is available for entry when the Split Net Terms check box is selected.

Basis To Day Enter the ending day of the basis day range. The basis date's day value must be equal to or less than this day or else the terms definition does not apply. This field is available for entry when the Split Net Terms check box is selected.

Timing ID Select to calculate the net payment due date for this day range within the single payment term.

Discount Terms Available Select if the terms that you are defining include discount terms.

Note. All available days, 1 to 31, must be accounted for in the basis from day and basis to day ranges.

Discount Terms

Timing ID Select to specify the discount portion of this single payment term.

Adjustment Days Enter the number of days used to adjust the discount due date for this single payment term. Define flexible discount terms by entering either *basis date relative* or *due date relative* discount due dates. This is useful if the discount terms are often calculated as, for example, 2 percent for the first 10 days following the start-of-terms (basis) date, or 2 percent up to 10 days before the payment due date.

Discount Terms Percent Enter the discount percent that is applied to the invoice gross amount to calculate the discount amount.

Discount Terms Amount Enter the flat amount discount that is applied to the invoice regardless of the invoice amount.

Note. This value is applied using the transaction currency units defined for the voucher. The particular currency to use is not defined here but is determined by context.

Viewing Where Payment Terms Are Used

Access the Search Where Used page (click the Search Where Used link on the Payment Terms - Single Payments page).

Multi-Payment Terms ID Displays the multipayment terms ID that uses this single payment terms ID.

Number of Terms	Indicates the number of installments contained within the displayed multipayment terms ID that appears.
Number of Occurrences	Indicates the number of times that this payment terms ID is used within the multipayment terms.

Calculating Example Data for Single Payment Terms

Access the Calculate Example Payment Data (single payment terms) page (click the Calculate Example Payment Data link on the Payment Terms - Single Payments page).

Gross Invoice Amount, Terms Basis Amount, and **Use Basis Amount**	Enter a value to use as the terms basis amount for the example discount calculation. To use a different amount, select the Use Basis Amount check box, which enables the Terms Basis Amount field, and enter a different value. **Note.** The terms basis amount value must be less than the gross invoice amount value.
Basis Date	The system populates this field with the current date by default.
Calculate Example Payment Data	Click the Calculate Example Payment Data button to calculate the payment data based on the values entered on the page.

Defining Multiple Payment Terms

Access the Multiple Pay Terms page (Services Procurement, Define Services Procurement, Settlement Setup, Invoicing Setup, Payment Terms - Multi Payment).

Group single payment terms for payments split into multiple payments or installments.

Calculating Example Data for Multiple Payment Terms

Access the Calculate Example Payment Data (multiple payment terms) page (click the Calculate Example Payment Data link on the Payment Terms - Multi Payment page).

Use this page in the same way that you use the Calculate Example Payment Data (single payment terms) page.

Defining the Accounts Payable Interface

Access the Accounts Payable Interface page (Services Procurement, Define Services Procurement, Settlement Setup, Invoicing Setup, Accounts Payables Interface).

Interface Select *Other* to indicate a third-party application. Select *PeopleSoft AP* to indicate that you use PeopleSoft Payables.

File Format PeopleSoft Services Procurement uses comma-separated values as its only file format. If you select *Other* as the interface, the system exports invoice data to a flat file using this format, which you can use to export to your accounts payable system for invoice voucher generation.

If you select *PeopleSoft AP* as the interface, this field is disabled, because it is not applicable.

Setting Up Multi-Resource Services

This section provides an overview of multi-resource services and discusses how to assign individual services to multi-resource services.

Understanding Multi-Resource Services

The multi-resource services feature supports a grouping of multiple unique services and service providers for Services Procurement requisitions, sourcing, and work orders. Each individual service represents a part of the overall multi-resource service. Multi-resource services provide an overall agreed upon amount that is not to be exceeded. This overall amount for a service or set of services is independent of the number of service providers associated to the service.

The feature enables you to manage complex work at a more granular level by assigning individual services to a multi-resource requisition with multiple unique-service providers to be sourced to that requisition to fill the required services. After you fill the requisition, the system allows multiple unique-service providers to report time against an individual work order while consuming against a single overall amount on the multi-resource work order.

The feature also enables service providers to enter time against an individual work order and have the related consumption recorded against the parent multi-resource work order total, and produce a consolidated invoice based on the reported time. Multi-resource services also enable service providers to enter time against a single work order strictly for tracking purposes.

To support multi-resource services, the system provides multi-resource service method for requisitions, sourcing, and work orders. You can use the multi-resource method to:

- Create a requisition with multiple unique services and an overall not to exceed amount.

  See Chapter 14, "Creating and Managing Services Procurement Requisitions," Multi-Resource Requisition Lines, page 287.

- Source multi-resource requisitions with multiple, unique services

  See Chapter 14, "Creating and Managing Services Procurement Requisitions," Multi-Resource Requisition Lines, page 287.

- Create a work order with multiple unique services and an overall not to exceed amount

  See "Managing Work Orders," Understanding Multi-Resource Work Orders

- Multiple service providers report time against a single multi resource work order
- Multiple service providers report expenses against a single multi resource work order

  See "Managing Settlements," Understanding Multi-Resource Settlements

You use the basic setup steps for the PeopleSoft Services Procurement system to use multi-resource services. For example, after a multi-resource service is available, you can define surveys, logistical tasks, activities, sourcing rules, and bid factor mappings for use with the service.

Several tasks make a multi-resource service method available for use with other basic setup features. You complete these tasks to implement multi-resource services:

- Define a service type that uses the Multi Resource service type method.

  The Services Procurement system provides the Multi Resource method as an option when you create a service type. After creating this service type, you can then associate it to services for use with multi-resource services.

- Define services for project roles to use with multi-resource service types.

  This enables you to apply services/projects for use with multi-resource services types.

- Define vendors for use with multi-resource services.

  The supplier type determines what type of requisitions the supplier can fill. Select the Multi Resource Supplier check box to enable the supplier to be setup for use with multi-resource services.

- Set up supplier networks and supplier sourcing for use with multi-resource service suppliers.

  You use the Supplier Sourcing Setup component to add suppliers to the supplier network in one central location. When a supplier is both resource- and deliverable-based, and the supplier is a multi-resource supplier, then the only difference in page values is that the Service Type field list of values would also contain multi-resource service types.

  When a supplier is just resource-based and is a multi-resource service supplier, you can select multi-resource services types from the list of values. If a supplier is delivery-based and is also a multi-resource services supplier, all five tabs would appear for the supplier, but you can only select multi-resource service types from the Service Type field list of values.

- Add individual services to multi-resource service.

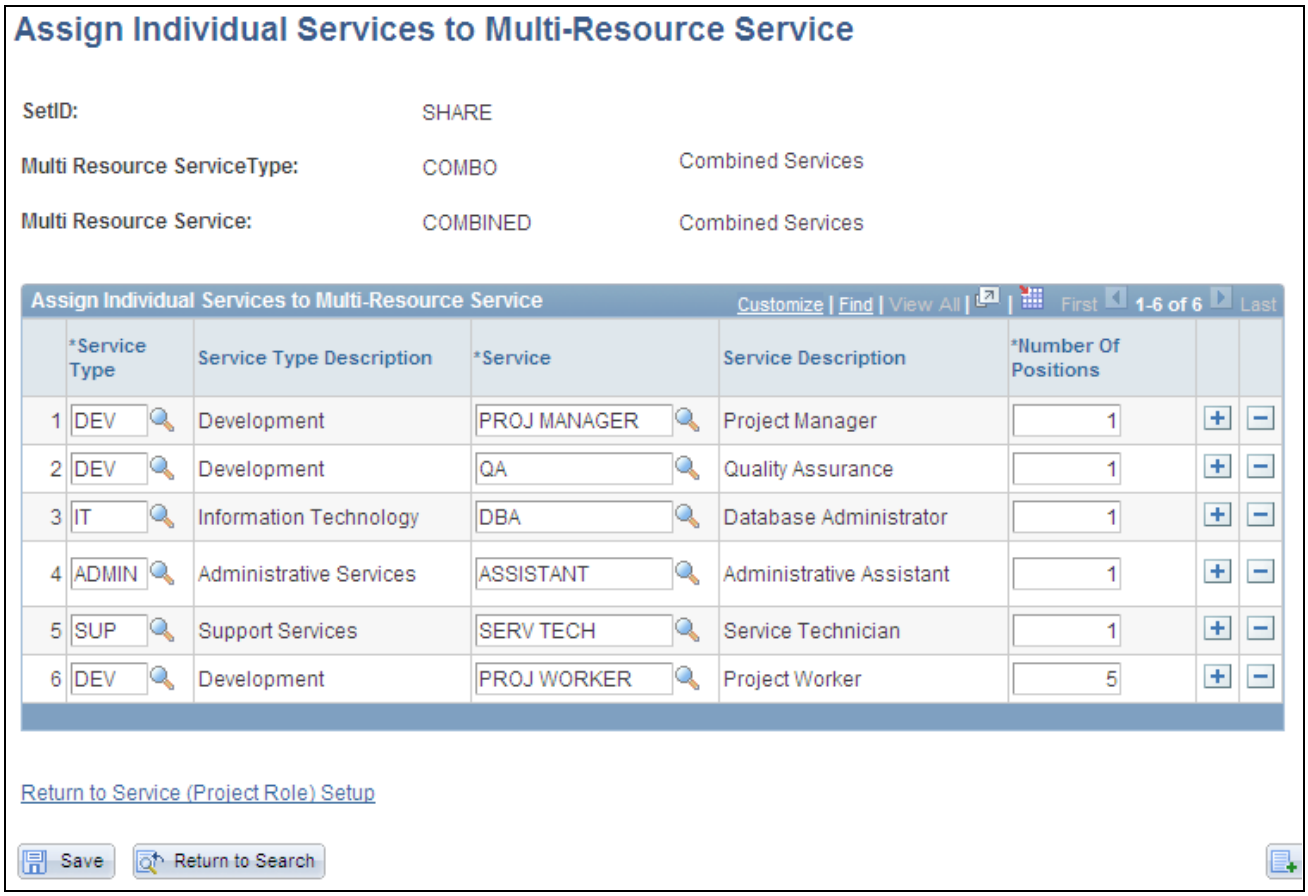
Note. Some differences in information exists within services methods and in invoicing that depend on which service you use. The behavior, settings, limitations, and capabilities for multi-resource services are basically consistent with services in a resource-based service. Exceptions to any differences are described throughout this PeopleBook.

Pages Used to Set Up Multi-Resource Services

Page Name	*Definition Name*	*Navigation*	*Usage*
Service Types	SPB_ROLE_TYPE	Services Procurement, Define Services Procurement, Service Setup, Service (Project Role) Setup, Service/Project Role	Assign a service type that uses the multi-resource method.
Service/Project Role	SPB_PROJ_ROLE	Services Procurement, Define Services Procurement, Service Setup, Service Type Setup, Service Types	Assign a service/project role that uses the multi-resource method.
Services Supplier Info	VENDOR_SPRO_PG	Services Procurement, Define Services Procurement, Service Supplier Setup, Services Supplier Information	Define a supplier as a multi-resource supplier. Select the Multi Resource Supplier check box to indicate that the supplier can be used with multi-resource services. If the check box is deselected, the supplier cannot be used with multi-resource services.
Supplier Sourcing Setup	SPB_SPLR_REGION_PG	Services Procurement, Define Services Procurement, Service Supplier Setup, Services Supplier Information	Assign suppliers for use with multi-resource work orders.
Assign Individual Services to Multi-Resource Service	SPB_MULTI_SRVC	Services Procurement, Define Services Procurement, Service Setup, Service (Project Role) Setup, Multi Resource Assignment	Assign individual services to multi-resource service.

Assigning Individual Services to Multi-Resource Services

Access the Assign Individual Services to Multi-Resource Service page (Services Procurement, Define Services Procurement, Service Setup, Service (Project Role) Setup, Multi Resource Assignment).



Assign Individual Services to Multi-Resource Service page

The header information on this page displays the multi-resource service type and service. The system uses the information you define on this page as default values when you create requisitions and work orders. You can associate only resource-based service type/services to multi-resource service types/services.

Note. If you are using PeopleSoft Human Capital Management, the Service Type and Service fields titles appear as Job Family and Job Code.

Service Type

Select a service type from which you want to use to add a service to a multi-resource service.

Note. Only Resource based Service Type/Services can be associated to a multi-resource service type/services.

Service Type Description

Displays the service type description when you select a service type.

Service

Select a service that you want to add to the multi-resource service.

Service Description

Displays the service description when you add the service.

Number of Positions

Enter the number of positions that you want to include for this service.

Chapter 6

Using Default Hierarchies

This chapter provides overviews of default hierarchies used in PeopleSoft Services Procurement, and discusses how to define the region hierarchy.

Understanding PeopleSoft Services Procurement Default Hierarchy

PeopleSoft Services Procurement enables you to set up several default hierarchy structures to use throughout your transaction processing. By setting up defaults, data entry is more consistent, saves time, and cuts down on redundancy and user error. Default values enable an Enterprise to predefine key values that automatically default onto requisitions and work orders.

The most common defaults for requisitions and work orders come from the requester or service coordinator user defaults or from the service type and the business unit. When requesters or service coordinators create requisitions or work orders, the system first determines whether there is default information available for requester, then the service coordinator, then the service type, in that order respectively. If there are no default values defined at the service type level, the system then uses defaults that are defined at the business unit level.

PeopleSoft Services Procurement provides default capability for those values that are relatively static in nature (values that remain the same in everyday operations and would become repetitive to enter for every transaction). For example, if you set up your ChartField defaults with the most appropriate values for your service request, you have little need to drill down to the requisition's distribution level to enter any values. The ChartField values at that level are set by default.

Note. Although it is possible to establish several defaults for your requisition and work orders, you can override most values at the requisition and work order component levels.

Understanding Transaction Defaults

This table details the levels in the transaction default hierarchy from which the selected transaction values can appear by default. The Default Source indicates where the Transaction Field Value comes from. If there is more than one default source listed, then follow this order: review from left to right, with the left-most source taking precedence, and continues from left to right in that order.

The default values listed default onto requisitions, work orders, timesheets, and progress logs.

Transaction Field Value	*Default Source*
Service Method	Service Method field on the Service Types page.

Transaction Field Value	*Default Source*
Category	Category field on the Category Definition page, where Category is the item category defined for the service type on the Service Types page.
Score	Score field on the Service Types and Services Procurement Bus Unit pages.
Allow Multicurrency Reqs (allow multicurrency requisitions)	Allow Multicurrency Reqs field on the Services Procurement Bus Unit page.
Currency	Currency field on the Services Procurement Bus Unit page.
Location	Location field on the Services Procurement Bus Unit page.

Requisition Defaults

The following table lists values that default onto requisitions.

See Chapter 14, "Creating and Managing Services Procurement Requisitions," page 285.

Transaction Field Value	*Default Source*
Business Unit	Business Unit field from the Requester's Overall Preferences page.
Requester	Requester field from the Requester's Procurement user preferences page.
Currency	Currency field from the Requester Setup page; Currency field from the Purchasing Business Unit Definition page.
Service Type	Service Type field from the Service Requester Defaults page.
Service	Service field from the Service Requester Defaults page.
Requesting Dept	Department field from the Requester's Procurement user preferences page.
Job Title	Description field from the Service/Project Role Attributes page.
Location	Ship To field from the Requester Setup page; Ship To Location field from the Requester's Procurement user preferences page.
Allow Expenses	Allow Expenses field from the Service Type page; Allow Expenses field from the Services Procurement Bus Unit page.
Time Reporting Option	Time Reporting Option field from the Service Type page; Time Reporting Option field from the Services Procurement Bus Unit page.
Scope of Work	Comments field from the Service/Project Role Attributes page.

Transaction Field Value	*Default Source*
Rate and Unit of Measure (Resource Only)	Rate and Unit of Measure fields from the Maintain Rate Sheets page.
Unit of Measure (Resource Only)	If no rate sheet exists for the service and region, then the value comes from the Days or Hours Unit of Measure field on the Services Procurement Installation Options page.
Competencies (Resource Only)	Competencies field from the Service/Project Role Attributes page.
Other Skills (Deliverable Only)	Competencies field from the Service/Project Role Attributes page are concatenated into the Other Skills field.
Education Level (Resource Only)	Education Level field from the field Service/Project Role Attributes page.
Experience (Resource Only)	Experience field from the Service/Project Role Attributes page.
Interview Required (Resource Only)	Interview Required field from the Service/Project Role Attributes page.
Track Resources(s) (Deliverable Only)	Track Resource(s) field from the Service Types and Services Procurement Bus Unit pages (Work Order Settings tab).
Service Coordinator and Service Team (non-VMS)	Service Coordinator or Service Team field from the Service Requester Defaults page.
Service Coordinator and Service Team (VMS)	Service Coordinator or Service Team field on the VMS Details by Supplier and Business Unit page. See Chapter 10, "Establishing and Managing VMS," page 257.
Individual Services (Multi Resource Only)	Individual service information is defaulted from the Assign Individual Services to Multi Resource Service page when you click the Use Default Services button.

ChartFields

This table details the default values for various ChartFields used on requisitions.

ChartField	*Default Source*
Dept (department)	ChartField Dept field from the Requester's Setup page; Department field from the requester's Procurement user preferences page.
Location	Ship To field from the Requester Setup page; Ship To Location field from the requester's Procurement user preferences page.
GL Unit	ChartFields GL Unit field from the Requester Setup page; GLUnit field on the Purchasing Business Unit Definition page.
Account (Labor)	Account field from the Category Definition page, where Category is the item category defined for the service type.

ChartField	***Default Source***
Account (Expense Distrib.Type)	Default Expense Account field from Services Procurement Bus Unit page. If not found, then the Account associated to the category for the service type.

Sourcing Defaults

The following table list values that default onto sourcing pages.

See Chapter 15, "Managing PeopleSoft Services Procurement Sourcing," page 339.

Transaction Field Value	***Default Source***
Supplier Information - Sent To, Provider Contact, Notification Method, Maximum Submittals	Various fields from Region/Service Type combination for resource based or Region/Service combination for deliverable based, Region only or Service/Service Type only (order determined by sourcing preference defined on Business Unit); Services Procurement Bus Unit page.

Work Order Defaults

The following table lists values that default onto work orders.

See Chapter 18, "Managing Work Orders," page 413.

Note. If you create a work order that is linked to a requisition, many of the values that automatically default onto the requisition will also default onto the work order.

This table represents default values for work orders that are not linked to requisitions.

The Default Source indicates where the Transaction Field Value comes from. If there is more than one default source listed, then follow this order: review from left to right, with the left-most source taking precedence, and continues from left to right in that order.

Transaction Field Value	***Default Source***
Business Unit	If the service coordinator creates a work order, then Business Unit value defaults from the Business Unit field on the Service Coordinator's Overall Preferences page, otherwise it comes from the Business Unit field on the Requester's Overall Preferences page.
Service Type	If the service coordinator creates a work order, then the Service Type value defaults from the Service Type field on the Service Coordinator Defaults page, otherwise it comes from the Service Type field on the Service Requester Defaults page.

Transaction Field Value	***Default Source***
Service	If the service coordinator creates a work order, then the Service value defaults from the Service field on the Service Coordinator's Defaults page, otherwise it comes from the Service field on the Service Requester Defaults.
Requesting Dept	Department field from the requester's Procurement user preferences page.
Job Title	Description field from the Service/Project Role Attributes page
Location	Ship To field from the Requester Setup page; Ship To Location field on the requester's Procurement preferences page; Ship To Location field from the Service Coordinator's Procurement user preferences page.
Allow Expenses	Allow Expenses field on the Service Type page; Allow Expenses field from the Services Procurement Bus Unit page.
Invoice Approver	Invoice Approver field from Service Requester Defaults page; Invoice Approver field from the Service Coordinator Defaults page.
Supplier Invoice Approver	Non VMS: From The work order's Service Provider Contact field. VMS: From the work order's VMS Service Coordinator field. If the work order's VMS coordinator is a Service Team, and there are more than one member of the team, then no default is provided and it must be supplied by the user, otherwise the sole member of the team is defaulted into the Supplier Invoice Approver field.
Time Reporting Option	Time Reporting Option field from the Service Type; Time Reporting Option field from the Services Procurement Bus Unit page.
Scope of Work	Comments field from the Service/Project Role Attributes page.
Currency	Currency field from the Requester Setup page; Currency field from the Purchasing Business Unit Definition page.
Rate and Unit of Measure (Resource Only)	Rate and Unit of Measure fields from the Maintain Rate Sheets page.
Unit of Measure (Resource Only)	If no rate sheet exists for the service and region, then the value comes from the Days or Hours Unit of Measure field on the Services Procurement Installation Options page.

Transaction Field Value	*Default Source*
Competencies (Resource Only)	Competencies field from the Service/Project Role Attributes page.
Other Skills (Deliverable Only	Competencies from the Service/Project Role Attributes page are concatenated into the Other Skills field.
Education Level (Resource Only)	Education Level field from the Service/Project Role Attributes page.
Experience (Resource Only)	Experience field from the Service/Project Role Attributes page.
Track Resources (Deliverable Only)	Track Resource(s) field from the Service Type page; Track Resource(s) field from the Services Procurement Bus Unit page (Work Order Settings tab).
Work Order Alerts	Work Order Alerts values from the Service Requester Defaults page; Service Coordinator Defaults page; Service Type page; Services Procurement Bus Unit page (Work Order Settings tab).
Survey ID	Survey ID field from the Surveys by Service Types page.
Require Survey	Require Survey field form the Service Types page.
Automatically Send Survey	Automatically Send Survey field from the Service Types page.
Survey Role Distribution List	Role Distribution List field from the Setup Survey page.
Service Coordinator and Service Team (non-VMS)	Service Coordinator or Service Team field on the Service Requester Defaults page. When the service coordinator creates a work order, the service coordinator who creates the work order is defaulted into the field.
Service Coordinator and Service Team (VMS)	Service Coordinator or Service Team field on the VMS Details by Supplier and Business Unit page. See I'll add the link to the section in the VMS chapter
Individual Services (Multi Resource Only)	Individual Service information is defaulted from the Assign Individual Services to Multi Resource Service page when you click the Use Default Services button.

ChartFields

This table details the default values for various ChartFields used on work orders.

See Chapter 6, "Using Default Hierarchies," Requisition Defaults, page 208.

Understanding Service Requester Defaults

This section discusses how to define service requester defaults.

Service Requester Defaults

Use the Service Requester Defaults page to simplify the requisition and work order data entry process for requesters. When you define service requester default values, requesters can use those values when creating multiple requisitions and work orders. This streamlines data entry for each requester, because default information appears on requisitions and work orders automatically. You can then authorize established purchasing users to enter and process requisitions for all or specific requesters.

Service requester default values include, but are not limited to the following fields:

- Service Type
- Service (Project Role)
- Service Coordinator/Team
- Invoice Approver
- Allow Time/Expense Overage %
- Alerts Notification Method
- Work Order Alerts

In addition, the following values are defaulted from the requesters Procurement User Preferences

- Location
- Ship To

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Service Requester Defaults, page 141

Understanding Service Coordinator Defaults

This section discusses how to define service coordinator defaults.

Service Coordinator Defaults

Use the Service Coordinator Defaults page to simplify the work order data entry process for service coordinators.

Service coordinator default values include, but are not limited to the following fields:

- Service Type
- Service (Project Role)
- Invoice Approver
- Authorized to Delegate
- Authorized to Change Sourcing Rules
- Allow Time/Expense Overage %
- Alert Notification Method
- Work Order Alerts
- Expense Approver

In addition, the following values are defaulted from the service coordinators Procurement User Preferences:

- Location
- Ship To

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Service Coordinator Defaults, page 143

Defining the Region Hierarchy

Use the region hierarchy to determine the best suppliers to source the requisition request. Use the Region Codes and Tree Manager pages to build the region default structure and associate locations to the regions.

Once you establish the region hierarchy, use it to define rates and valid suppliers for sourcing.

The location specified on a requisition or work order is used to determine the related region for identification of associated rates.

Note. If the Use Region Tree Structure option is not selected on the Services Procurement Installation Options page, the Locations by Region page is used instead of the Region Tree to associate locations to regions for purposes of determining rates.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Building the Region Hierarchy, page 111

Chapter 7

Integrating with Other PeopleSoft and Third-Party Applications

This chapter discusses how to:

- Integrate with PeopleSoft Accounts Payables.
- Integrate with PeopleSoft Project Costing.
- Integrate with PeopleSoft Purchasing.
- Integrate with PeopleSoft HCM (Human Capital Management).
- Integrate with PeopleSoft Resource Management.
- Integrate with PeopleSoft Recruiting Solutions.

Integrating with Accounts Payables Applications

This section discusses how to export approved PeopleSoft Services Procurement transactions to PeopleSoft Payables or to a third-party accounts payable application to create invoices.

Here are the steps to export services transactions:

1. If you are using PeopleSoft Payables, use the Voucher Batch Req page to run the Voucher Build Application Engine process to generate the voucher.
2. If you are not using PeopleSoft Payables, use the Export To Payables Application Engine process to export invoice data to a flat file.

Note. You specify the accounts payable application interface using the Accounts Payable Interface page.

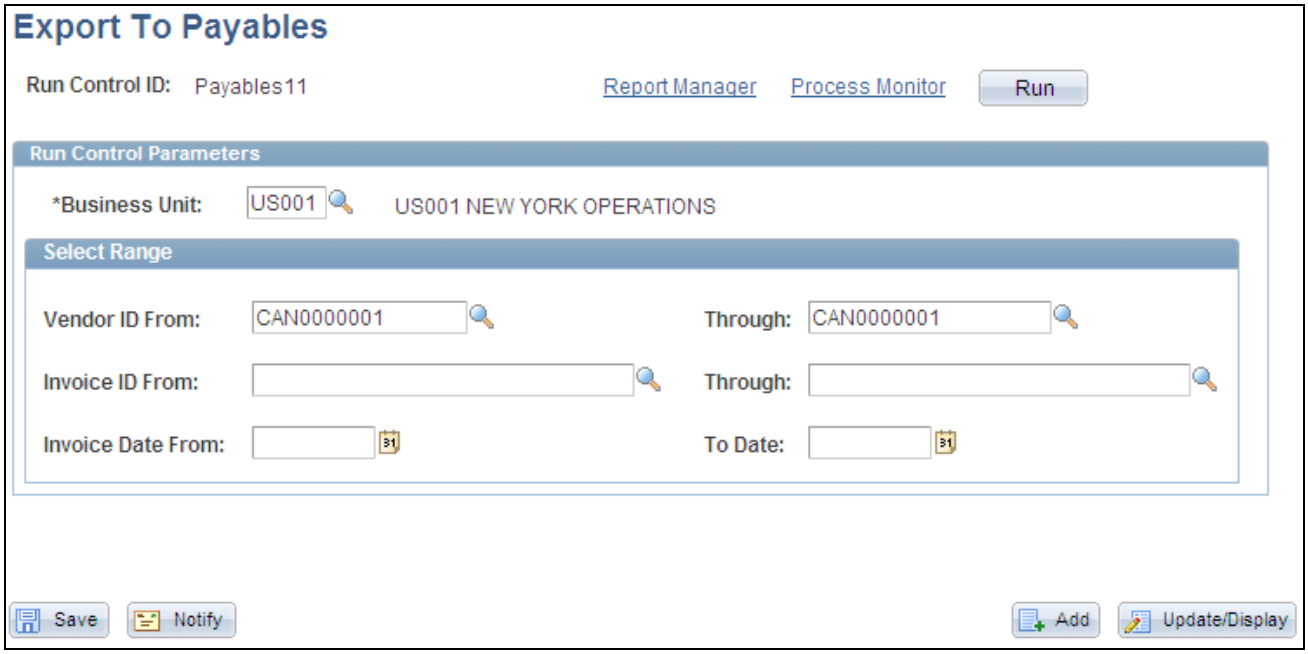
If the currency on the invoice is different from the currency defined for the vendor, the system uses the rate type on the Services Procurement Business Unit Options page to convert the invoice amount into the vendor's currency.

Page Used to Integrate with Accounts Payables Applications

Page Name	*Definition Name*	*Navigation*	*Usage*
Export To Payables	SPA_GEN_INV_EXPORT	Services Procurement, Services Settlement, Export to Payables	Export invoicing data to a PeopleSoft Payables staging table or to a flat file.

Exporting Services Transactions for Invoicing

Access the Export To Payables page (Services Procurement, Services Settlement, Export to Payables).



Export To Payables page

Enter the run control parameters for exporting invoicing data.

Process Results

The Export To Payables process writes to PeopleSoft Payables staging tables or a flat file based on the PeopleSoft Accounts Payable interface defined for the SetID.

If you selected *PeopleSoft AP* as the accounts payable application interface using the Accounts Payable Interface page, the PeopleSoft Application Engine (SPF_IEXPMAIN) exports invoicing data approved in PeopleSoft Services Procurement to staging tables (VCHR_HDR_STG, VCHR_LINE_STG, and VCHR_DIST_STG) in PeopleSoft Payables.

Note. For individual service work orders associated to a multi-resource parent, the systems sends the parent work order ID and sequence number to Accounts Payable to aid in matching to the related purchase order.

Note. After running the Export to Payables process, use the Voucher Build process in PeopleSoft Payables to generate vouchers for the approved invoices posted to PeopleSoft Payables.

If you selected *Other* as the accounts payable application interface using the Accounts Payable Interface page, the process exports invoicing data approved in PeopleSoft Services Procurement to a fixed format, comma-separated values (CSV) flat file, which you can use to import data into an accounts payable application and generate invoices.

Integrating with PeopleSoft Project Costing

This section lists a prerequisite and discusses how to export approved time (resource-based), expense (resource-based and deliverables-based), and progress log (deliverable-based) information to PeopleSoft Project Costing.

Here are the steps:

1. Export approved time, expense, and progress log information to a staging table.
2. In PeopleSoft Project Costing, run the process to import staging table data into PeopleSoft Project Costing tables.

Note. When you run the SPA_PROJ_EXP process, the system processes and populates the Project Resource integration staging table (SP_PROJ_RES_STG) with only those work order distribution rows that have a Project Costing business unit, project ID, and activity ID.

Prerequisite

Before exporting time, expense, and progress log information to Project Costing, ensure that the following fields are set as you want them in the System Analysis Types group box on the Project Costing Integration page (Set Up Financials/Supply Chain, Install, Installation Options and select Project Costing Integration). The system is delivered with default settings, but you can change them.

- Expenses
- Mobile Time / Expense
- sPro Assignment Incident
- sPro Progress Log

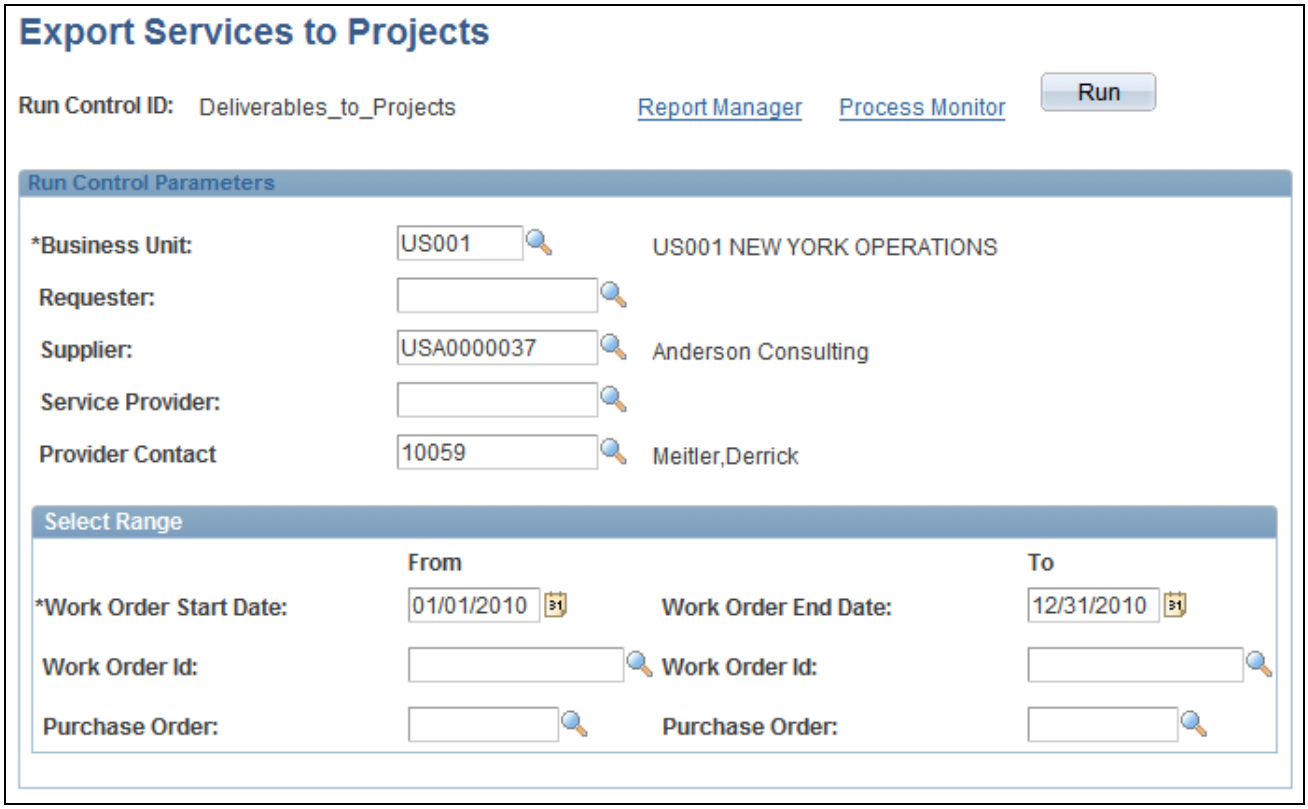
See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Defining Project Costing Integration Installation Options.

Pages Used to Integrate with PeopleSoft Project Costing

Page Name	*Definition Name*	*Navigation*	*Usage*
Export Services to Projects	SPF_PROJ_EXP	Services Procurement, Manage Projects and Activities, Export Services to Projects	Define run control parameters for exporting time, expense, and progress log data to a staging table.
Cost Collection - Services Procurement	PC_SP_TO_PC	Project Costing, Cost Collection, Services Procurement	Load PeopleSoft Services Procurement staged data into PeopleSoft Project Costing.

Exporting Time, Expense, and Progress Log Information to PeopleSoft Project Costing

Access the Export Services to Projects page (Services Procurement, Manage Projects and Activities, Export Services to Projects).



Export Services to Projects page

Define the parameters to use to export the time, expense, and progress log information.

Business Unit Enter the Services Procurement business unit to select the work orders that you want to send to Project Costing.

Provider Contact Select a provider contact to export progress log information. You must also select a business unit and supplier prior to selecting a provider contact.

Work Order ID Select a work order ID to send a specific work order to Project Costing.

Multi-resource service work orders along with their lower-level service work orders appear in the Work Order ID field list of values on this page. If a multi-resource work order is included in the work order selection range, the system processes all the lower-level service work orders for that multi-resource work order. If you select a lower-level service work order, then the system processes only that work order. If you select both multi-resource and lower-level service work orders in the same range, the SPA_PROJ_EXP process ignores duplicates and processes the lower-level service work orders only once.

Process Results

The PeopleSoft Application Engine process (SPA_PROJ_EXP) exports this information to the Project Resource staging table (SP_PROJ_RES_STG):

- Approved time transaction data from PeopleSoft Services Procurement time and expense tables.

  Services Procurement sends time data to Project Costing using an analysis type of TLX for time based labor and an analysis type of INC for incident based assignments. Project Costing can then use these analysis types to process transactions.

- Approved progress log data from PeopleSoft Services Procurement tables.

  Services Procurement sends progress log data to Project Costing using an analysis type of SPL. Project Costing can then use the analysis type to process the transactions.

- Approved expense data from PeopleSoft Services Procurement tables.

  Services Procurement sends expense data to Project Costing using an analysis type of ACT. Project Costing can then use the analysis type to process the transactions.

When you run this process, the system processes and populates the staging table with only those work order distribution rows that have a Project Costing business unit, project ID, and activity ID.

Note. Run the Cost Collection process in PeopleSoft Project Costing for Services Procurement Application Engine process (PC_SP_TO_PC) to load the staged data into PeopleSoft Project Costing.

See Also

PeopleSoft Project Costing 9.1 PeopleBook, "Integrating with Services Procurement," Importing Time, Expense, and Progress Log Data into PeopleSoft Project Costing

Integrating with PeopleSoft Purchasing

This section discusses how to pass approved service work orders information to the PeopleSoft Purchasing application.

Here are the steps:

- The requester or service coordinator clicks the Process Purchase Order button at the bottom of the Work Order page to submit the work order details to the purchase order staging table PO_ITM_STG.
- After you click the Process Purchase Order button, a link to the quick source application engine appear at the bottom of the Work Order - Cost page.

  Use the quick source process to create purchase orders from data in the staging table.

  Note. This process occurs regardless if a requisition is associated to a work order.

Note. If a new resource is assigned to the work order from a different vendor or for a different currency, a new purchase order will be created. The original work order amount will be broken out between the original work order and the replacement work order.

See Also

Chapter 18, "Managing Work Orders," page 413

Integrating With PeopleSoft HCM

When you implement both PeopleSoft Services Procurement and HCM applications, you can configure HCM as the system of record to maintain user details. When the HCM Person Integration installation option is enabled on the Services Procurement Installation Options page, the enterprise administrators can register a PeopleSoft Services Procurement user as an HCM person with a unique employee ID and create unique operator login profiles within the HCM database.

The following six users are either registered in the HCM database with a unique Person ID, or they are created in the SCM database without a Person ID. Each user has a specific role that enables them to perform specific tasks within the application:

- *Service Procurement Administrator:* This user can register all other users in the Services Procurement system, as well as perform basic application setup.

  This user is created in the HCM database and has a unique person ID.
- *Approver:* This enterprise user may be designated as requisition, work order, or time and progress log approver.

  This user is created in the HCM database and has a unique person ID.

- *Requester:* This enterprise user determines specific requirements for a resource and creates a requisition listing those requirements.

  The requester might designate a service coordinator to source the requisition and handle the fulfillment process. This user is created in the HCM database and has a unique person ID.

- *Service Coordinator:* This user may work for the enterprise or the supplier.

  The user who handles the sourcing of requisitions to different suppliers and also handles supplier bids to ensure that the request is filled with the most qualified resource.

  The service coordinator must have a unique service procurement person ID.

- *Service Provider Contact:* This is a non-enterprise user who manages a team of service providers and handles bidding with the service coordinator.

  This user is registered in the SCM database and has a unique service procurement person ID.

- *Service Provider:* This supplier resource is submitted as a potential candidate for a sourced requisition.

  The service provider is registered in the SCM database and has a unique services procurement person ID. Once this user is registered in the SCM database, personal data is sent back to the HCM database, where a new person entry and operator login profile is created for the service provider.

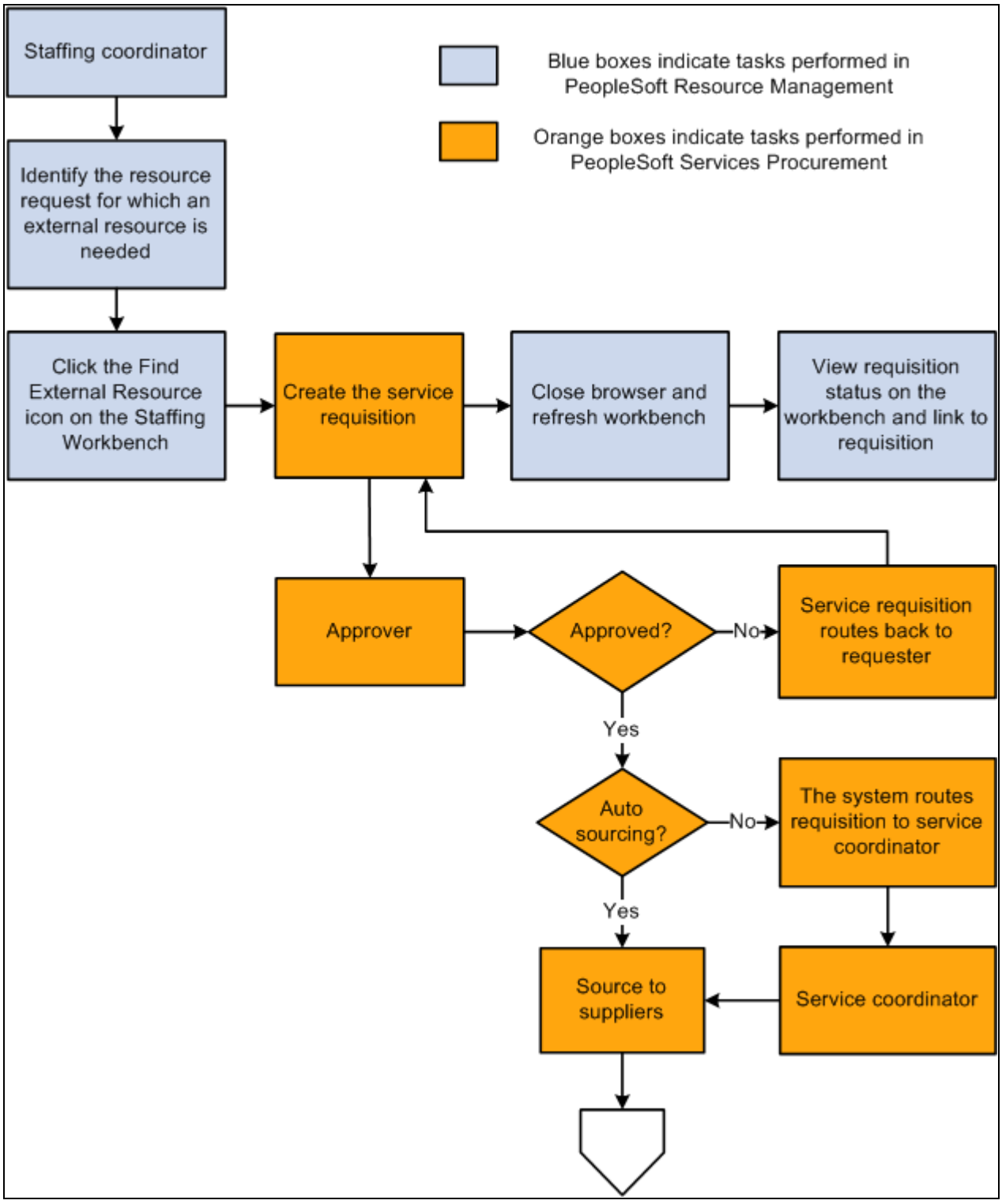
See Also

Appendix C, "PeopleSoft Human Capital Management Integration," page 671

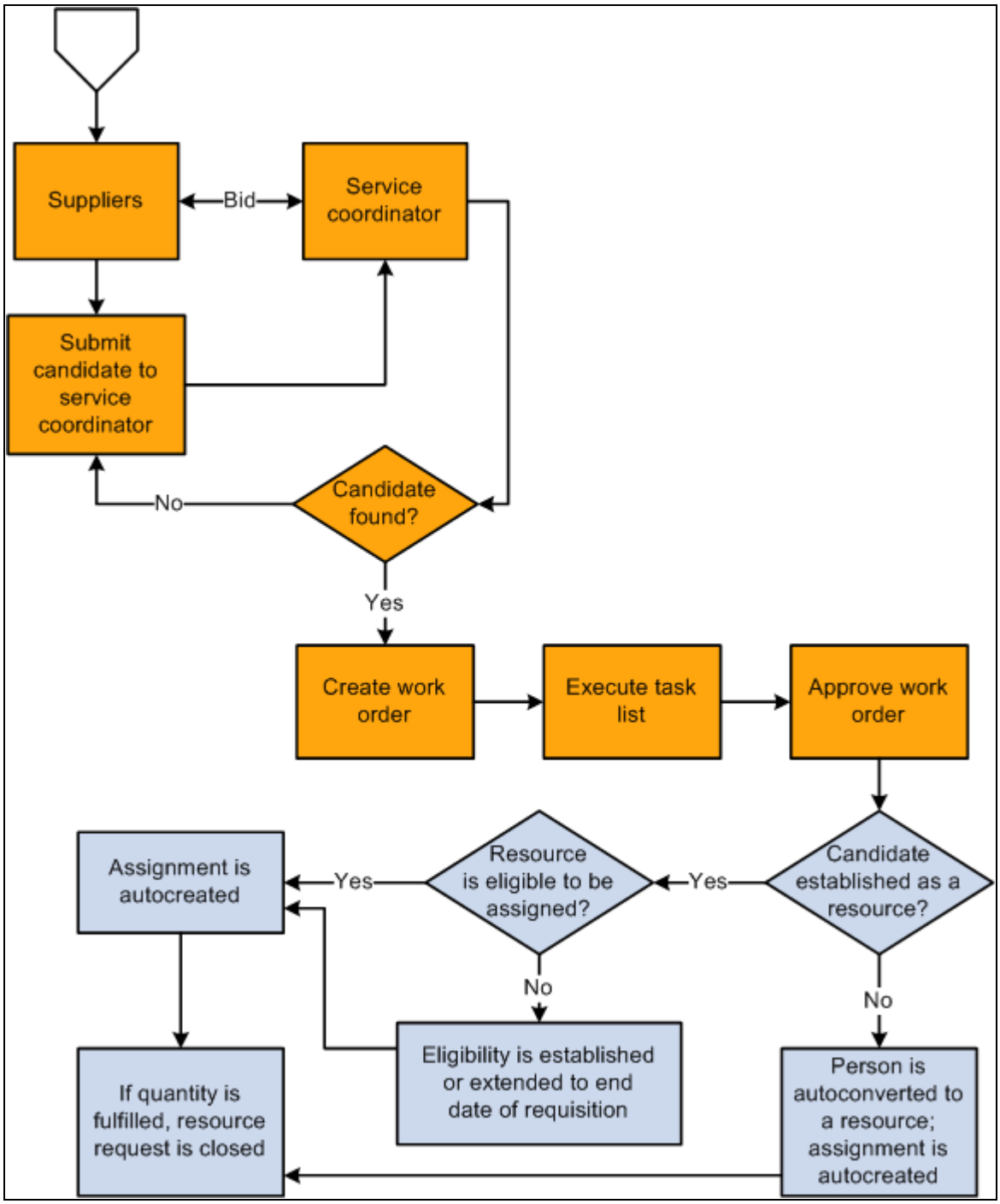
Integrating With PeopleSoft Resource Management

PeopleSoft Resource Management provides an end-to-end solution for managing services spend and for maximizing the value obtained from those services. PeopleSoft Services Procurement integrates with PeopleSoft Resource Management, enabling internal services orders to become a valid external service purchasing request. This enables enterprises to better utilize internal workforces before bringing in external resources.

The following diagram illustrates the integration between PeopleSoft Services Procurement and PeopleSoft Resource Management:



Services Procurement integration with Resource Management (1 of 2)



Services Procurement integration with Resource Management (2 of 2)

Service orders that are created in Resource Management are sent to Services Procurement for fulfillment by way of the Staffing Workbench. The user transfers directly to the Service Procurement requisition pages with populated data from the Resource Management system. The normal requisition process flow is followed, which includes updates to Resources Management upon filling the requisition and submitting and releasing the work order. The work order process creates an assignment and establishes the candidate as a resource on the Resource Management side.

Note. If your Services Procurement application is also integrated with PeopleSoft Human Capital Management, then when Services Procurement initiates a resource request, it requests Human Capital Management to provide a person or job before requesting Resource Management to create a resource and assignment. Services Procurement then passes the employee ID provided by Human Capital Management to Resource Management. If Resource Management already has the service provider as a resource, then an assignment is created. If Resource Management does not have the service provider as a resource, it creates a resource using the employee ID passed by Services Procurement and then creates an assignment. This prevents multiple employee IDs being generated for the same person.

See Also

PeopleSoft Resource Management 9.1 PeopleBook, "Integrating PeopleSoft Resource Management with Other Applications," Understanding Integration with PeopleSoft Services Procurement

Integrating With PeopleSoft Recruiting Solutions

PeopleSoft Recruiting Solutions provides a single point of entry for both permanent and contingent worker requests. Requests for contingent workers that are created in Recruiting Solutions may be routed to Services Procurement for fulfillment. If the Recruiting Solutions users chooses to post the job to Services Procurement, the user transfers directly to the Services Procurement requisition pages. Data from the Recruiting Solutions job posting is transferred to the Services Procurement requisition by way of an XML message in the HR-XML consortium standard "Position Opening" message format. Standard requisition defaulting logic is used to fill in any data used by Services Procurement that is not provided from Recruiting Solutions where available, and all remaining data must be defined manually.

The requisition then undergoes the normal workflow path for approval and sourcing within Services Procurement. Once the requisition is filled and the related work order is approved, Recruiting Solutions is updated with information about the worker by way of an XML message in the HR-XML consortium standard "Candidate" message format.

Note. Cancellation of a requisition created by Recruiting Solutions must be initiated from the Recruiting Solutions system.

Note. All Recruiting Solutions requesters in the HCM database must have a user profile defined in the SCM database and they must also be set up as Services Procurement requesters.

Chapter 8

Setting Up PeopleSoft Services Procurement Workflow

This chapter provides an overview of PeopleSoft Services Procurement workflow and discusses how to:

- Configure the workflow system.
- Define basic workflow settings for Services Procurement.
- Modify workflow settings.
- Reassign workflow tasks.

Understanding PeopleSoft Services Procurement Workflow

Approval workflow management is the process of taking a transaction through the organization until it is accomplished or stopped. PeopleSoft Services Procurement provides two types of workflow. The first type is the PeopleSoft Approval Framework. Services Procurement can use this method for approving requisitions, work orders, timesheets, expenses, and progress logs when you select to require approvals for the transaction using the Services Procurement Bus Unit page. The complete setup and use of the approval framework is described in the *PeopleSoft FSCM 9.1 PeopleBook: Approval Framework.*

The second type of approval is PeopleTools workflow technology. When you do not use the approval framework, Services Procurement transactions, including invoices, uses the workflow notifications that you setup through workflow technology. When you are not using the approval framework, in Service Procurement, the system automatically sets a transaction to the Approved status when a user submits it. Also, the system initiates any workflow notifications defined for the transaction.

See *PeopleTools PeopleBook: Workflow Technology.*

PeopleSoft Services Procurement workflow provides mass approval, denial, and hold capability and reason codes for denying workflow components.

The steps for approving PeopleSoft Services Procurement workflow transactions, such as expenses, requisitions, or work orders, are described in chapters for each transaction.

PeopleTools Workflow Technology

You can use email notifications and worklists for all activities in a transaction's workflow technology process. With workflow notifications, you can:

- Enable or disable notifications on the Workflow Notifications page.

- Define email notifications that are sent as part of workflow process.
- Automate parts of the sourcing process by defining sourcing rules on the Automatic Sourcing page.

Note. To work with multiple approvals, you can select multiple transactions by selecting multiple check boxes and then approve them all at once.

See Also

PeopleTools PeopleBook: Workflow Technology

PeopleSoft Application Fundamentals 9.1 PeopleBook, "Getting Started With PeopleSoft Application Fundamentals"

PeopleTools PeopleBook: Security Administration

PeopleSoft Approval Framework Processing

This chapter provides a brief overview of setting up each component that uses approval workflow.

The PeopleSoft Approval Framework requires less technical skills than PeopleTools workflow technology. For example, all of the steps in approval workflow are defined using PeopleSoft pages rather than the underlying PeopleSoft PeopleCode, so functional users can design and maintain workflow using these online PeopleSoft pages instead of requiring technical developers to create workflow rules. In addition, the approval workflow framework enables you to approve transactions at the line level and use several additional approval features.

Approvals can be role-based or driven by views. For more information about the detailed process of setting up approval workflow:

See *PeopleSoft FSCM 9.1 PeopleBook: Approval Framework*

The procedures for setting up each workflow transaction in PeopleSoft Services Procurement are basically the same. PeopleSoft Services Procurement delivers standard transaction registries, process definitions, email templates, and user definitions that you can use for approval processes. You can also use them as a template to define a new approval workflow process.

You can set up the approval framework process to streamline the approval of these PeopleSoft Services Procurement components:

- Requisitions
- Work orders
- Timesheets
- Expenses
- Progress logs

Note. Invoice approvals do not use the approval framework to process approvals. Instead, invoice approvals are accomplished using PeopleSoft Services Procurement worklist and notification pages.

After you create a transaction, such as a services work order or requisition, the system routes it to the Manage Approval component. The system also sends a message to the approver's worklist along with the transaction for which the approver must take action. Approvers can take action from the worklist or by using the Monitor Approval feature. In either case, they can preview, in a graphical format, the path a transaction approval will take and who has already approved the transaction, and see any comments previous approvers have entered.

Note. The worklist item is not removed from the reviewer's worklist until it is marked as worked.

While the system awaits approval action, the approval workflow engine maintains the overall state of the transactions approval status, invokes routings, and interacts with the application classes.

During the approval process these actions take place:

- The system notifies approvers and reviewers that there is a pending transaction that needs their attention.
- Approvers and reviewers access the transaction details, provide comments, and take action (approve, deny, or hold) for the transaction.
- The system checks for additional routings in the same routing path.

  If all routing paths have been completed for the stage then the next routing path is started in the next stage. If there are multiple routing paths, the system routes them in parallel.
- After all approvers on a transaction have approved, the approval framework notifies the Services Procurement application.

  The system then prepares the transaction for the next stage of its life cycle.

Approval Workflow Setup Steps

Before you can send a transaction approval for review, such as an expense or progress log, you need to set up the transaction for use with approval workflow. The system provides the basic templates and processes for approvals that system administrators can use to set up approval workflows.

Configuring the Workflow System

To set up workflow notifications, use the Workflow Notification (SPB_WF_NOTIFY) component. To set up automatic sourcing, use the Automatic Sourcing (SPF_AUTOSOURCE) component.

This section discuss how to:

- Use the Maintain Workflow page.
- Set up workflow notifications.
- Set up sourcing emails.
- Specify automatic sourcing rules.

Pages Used to Configure PeopleSoft Services Procurement Workflow System

Page Name	*Definition Name*	*Navigation*	*Usage*
Maintain Workflow	PV_ADM_WORKFLOW	Services Procurement, Define Services Procurement, Workflow Setup, Maintain Workflow	Configure a workflow system.
Workflow Notifications	SPB_WF_NOTIFY	Services Procurement, Define Services Procurement, Workflow Setup, Workflow Notifications	Enable or disable notifications for activities in the requisition fulfillment process.
Automatic Sourcing	SPF_AUTOSOURCE	Services Procurement, Define Services Procurement, Sourcing Setup, Automatic Sourcing	Specify the rules for automatic sourcing.
Define Template	WL_TEMPLATE	Services Procurement, Define Services Procurement, Workflow Setup, Notification Templates	Specify the content of email notifications that are used in PeopleSoft Services Procurement workflow.
Blackberry Email Responses	WL_TEMPL_RESP	Select the Blackberry Email Response tab on the Define Templates page.	Create email responses.
Generic Template Definition	WL_TEMPLATE_GEN	PeopleTools, Workflow, Notifications, Generic Templates	Enter generic template definitions.
URL Maintenance	URL_TABLE	PeopleTools, Utilities, Administration, URLs	Use this page to identify the URL that the notification process places within the email. This URL is then used to navigate the user back into their system to perform the required task. **Note.** An example of the format to use is *http://servername/psp/employeeportaldomain/*.
Services Procurement Installation Options	INSTALLATION_SP	Services Procurement, Define Services Procurement, General Setup, Installation Options	Set up PeopleSoft Services Procurement installation options.

Page Name	*Definition Name*	*Navigation*	*Usage*
Permission List - Pages	ACL_MENU2	PeopleTools, Security, Permissions and Roles, Permission List	Create and maintain permission lists.
Process Definitions	PRCSDEFN	PeopleTools, Process Scheduler, Processes	Define each specific run request by identifying a variety of variables.

Using the Maintain Workflow Page

Access the Maintain Workflow page (Services Procurement, Define Services Procurement, Workflow Setup, Maintain Workflow).

You begin configuring PeopleSoft Services Procurement workflow options on the Maintain Workflow page. The Maintain Workflow page is the focal point for configuring the PeopleSoft Services Procurement workflow system. Using the page you can access all workflow setup components for Service Procurement. You can also access workflow setup components by selecting: Enterprise Components, Approvals.

Setting Up Workflow Notifications

Access the Workflow Notifications page (Services Procurement, Define Services Procurement, Workflow Setup, Workflow Notifications).

Use this page to define the workflow notifications that you want to use with PeopleSoft Services Procurement. Select the check box for the workflow activity that you want to set up for email or worklist notification.

Note. In PeopleSoft Services Procurement, notification settings can take precedence over other notification settings.

Note. You cannot configure source notification on this page. The system obtains the notification method for sourcing activity from the Sourcing Selection page when a requisition is sourced.

Note. You cannot configure Client Bid Response notification on this page. The notification method for client bid response is the same as the method chosen during sourcing.

Note. The settings on this page are used in conjunction with the notification settings on the user profile. Only those users who are set up to receive email notifications will be notified by email when the Services Procurement transaction indicates that notification should be sent.

Note. URLs should be defined in the EMP_SERVLET and SUP_SERVLET (PeopleTools, Utilities, Administration, URLs) for generating email notifications from Services Procurement transactions to ensure that the correct URLs are included in the emails for situations in which the customer has separate web servers for the employee and supplier portals.

A warning appears if both the email and worklist options are disabled for an activity.

Setting Up Sourcing Emails

Use these steps to schedule sourcing emails:

1. Enable the Schedule Sourcing Emails option on the Services Procurement Installation Options page.
2. Add APPLICATION_ENGINE Component Permissions to EPSP4000 Permission List.

   Give Full Access to AE_REQUEST page only.
3. Create a new URL identifier named as SP_SRC_EM.

   Use the URL Maintenance page to create the identifier.
4. Create a generic email template named as SP_SRC_EM.

   Use the Generic Template Definition page to create the template.

   The system provides sample values for the sample template. You can use the value or override them with new values to create a new template of update the sample template. Template values include:

   - Instructional Text: Type names or email addresses in the To, CC, or BCC fields using semi-colons as separators.
   - Sender: User
   - Subject: %5 requisition %2 has been approved and is ready to be filled.
   - Message Text: %5 requisition %2 has been approved and is ready to be filled. To review the requisition and submit candidates click %10.

     Requisition/Line: %2/%3.

     Project: %4.

     Job Title: %5.

     Service Type: %6.

     Role: %7.

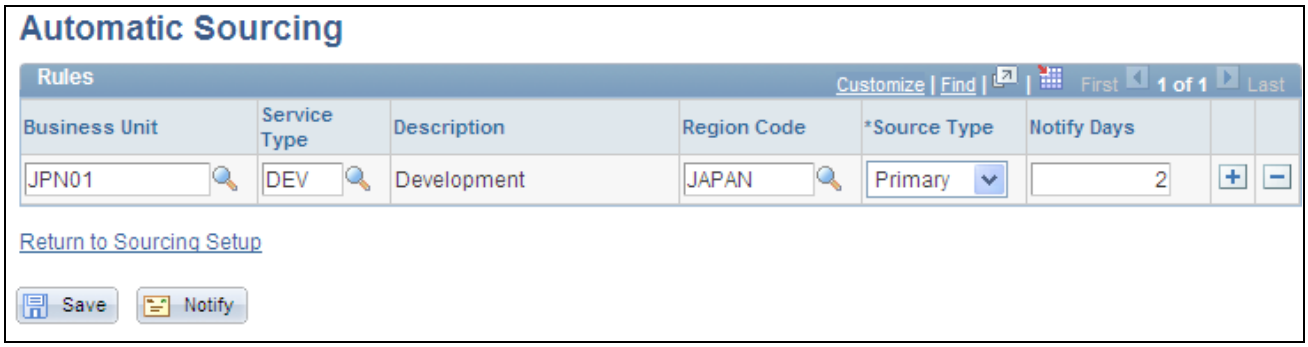
     Location: %8.

     Start Date: %9.
   - Set up the Process Scheduler Job.

     Use the Process Scheduler page to schedule a job and source the email notifications.

Specifying Automatic Sourcing Rules

Access the Automatic Sourcing page (Services Procurement, Define Services Procurement, Sourcing Setup, Automatic Sourcing).



Automatic Sourcing page

Enter a value into the Service Type field to define sourcing rules for specific service types (per business unit), or leave the Service Type field blank to define sourcing rules for all service types.

If you specify a number in the Notify Days field, you postpone automatic sourcing until the specified numbers of days have passed since the approval date. In this case, the PeopleSoft Application Engine process (SP_WF_SRC) checks requisitions that are approved but not yet filled within the notification days. Once the notification days are reached, the system automatically sources the requisition.

If you leave the Notify Days field blank, requisitions are sourced after approval, and you do not need to run the SP_WF_SRC application engine.

After the requisition is approved, the system automatically sources it based on the selections on this page. If you select a source type of *Primary* and a region code of *Bay Area*, when the requisition is approved, the system automatically sources the requisition to whichever supplier is listed as a primary source type and from the Bay Area region.

This prevents you from having to source each requisition manually.

- If service type and region code have values, the system looks for suppliers by service type and region and matches the source type.
- If only the service type has a value, the system looks for supplies by service type and source type.
- If only region code has a value, the system looks for supplies by region that also match the source type and requisition business unit.

The system searches for the business unit, then service type, then region, and then finds a supplier with a primary source code to match it; where it looks depends on how much information you included.

Note. If a requisition was sourced in the preceding 24-hours, the Application Engine process does not source it again. If a vendor already submitted a candidate for the requisition, that vendor is excluded from automatic sourcing.

Defining Basic Workflow Settings for Services Procurement

This section discusses how to:

- Set up requisition workflow.

- Set up work order workflow.
- Set up expense workflow.
- Set up progress log workflow.
- Set up timesheet workflow.

Note. Setting up PeopleSoft Services Procurement is similar from component to component. This section provides a high-level overview of setting up each component and any special considerations for each component.

Pages Used to Define Workflow

Page Name	*Definition Name*	*Navigation*	*Usage*
Services Procurement Bus Definition	BUS_UNIT_TBL_SP	Setup Financial/Supply Chain, Business Unit Related, Services Procurement, Services Procurement Options Select the Services Procurement Bus Unit tab.	Select PeopleSoft Services Procurement components that you want to include the workflow approval functionality. See Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining PeopleSoft Services Procurement Business Units, page 37.
Approval Transaction Registry	EOAW_AW_TXN	Services Procurement, Define Services Procurement, Workflow Setup, Maintain Workflow Click the Approval Transaction Registry link on the Maintain Workflow page.	Set up the transaction registry.
Configuration Options	EOAW_AW_TXN_NOTIFY	Services Procurement, Define Services Procurement, Workflow Setup, Maintain Workflow Click the Register Transactions link on the Maintain Workflow page. Click the Configuration Options tab.	Define workflow configuration options.

Page Name	*Definition Name*	*Navigation*	*Usage*
User List Definition	EOAW_USER_LIST	Services Procurement, Define Services Procurement, Workflow Setup, Maintain Workflow Click the User List Definition link on the Maintain Workflow page.	Set up user list definitions.
Approval Process Definition	EOAW_AW_PRCS_MAIN	Services Procurement, Define Services Procurement, Workflow Setup, Maintain Workflow Click the Approval Process Definition link on the Maintain Workflow page.	Define workflow approval process stages.

Setting Up Requisition Workflow

Requisition workflow approval enables you to approve requisition information relating to a service. Requisition approvals are available when you select the Requisition check box on the Services Procurement Bus Definition page.

Note. If you are using both PeopleSoft eProcurement and Services Procurement, this setting is set on the eProcurement Business Unit page and is not editable on the Services Procurement Business Unit page.

Approval definition criteria determines the goods or service requisition through the application class based on the setID and runs the appropriate process definition.

Note. PeopleSoft Services Procurement requisitions use the same workflow setup as the PeopleSoft eProcurement requisition, but if you are using both applications, you can set up different workflow rules for each type of requisition line.

PeopleSoft Services Procurement requisition lines have a category of services, and they route differently than the PeopleSoft eProcurement lines. You can also approve at the line level for requisitions rather than just the requisition header level.

The next table describes the delivered workflow values for requisitions:

Transaction Registry ID	*Process Definition ID*	*User List Definition ID*	*Email Notification Template ID*
Requisition	Requisition	Req-Dept Mgr-Line Level Req-Project Mgr-Line Level Requisitions-Department Mgrs Requisitions-Project Managers	ReqChangeRequestApprRouting ReqChangeRqstApprovalRouting ReqChngRqstApproved ReqChngRqstDenied Requisition Approval Requisition Approved Requisition Cancelled Requisition Denied Requisition Escalation Requisition Line Approval Requisition Line Approved Requisition Line Denied

See Also

Chapter 14, "Creating and Managing Services Procurement Requisitions," Approving and Denying Requisitions, page 326

Setting Up Work Order Workflow

Work order workflow approval enables you to approve work orders, including both the parent and child work orders for multi resource services. Work order approvals are available when you select the Work Order check box on the Services Procurement Bus Definition page.

PeopleSoft Services Procurement delivers a preconfigured work order workflow. You can use the delivered workflow configuration as is or you can make minor adjustments to meet business practices. You should understand the workflow technology before making any changes. For work order approvals, the system checks the work order requester's supervisor ID on the User Profile - Workflow page to send the approval.

The next table describes the delivered workflow values for work orders:

Transaction Registry ID	*Process Definition ID*	*User List Definition ID*	*Email Notification Template ID*
SP_WORKORDER	SP_WORKORDER	Work Order Original Requestor WorkOrder Approver	WO_On_Error WO_On_Escalation WO_On_Final_Approval WO_On_Final_Denial WO_On_Integration_Cancel WO_On_Review WO_Route_For_Approval Work Order General 1 Work Order General 2 Work Order General 3

See Also

Chapter 18, "Managing Work Orders," Submitting and Approving Work Orders, page 470

Setting Up Expense Workflow

Expenses workflow approval enables you to approve travel and expense information relating to a work order. Expense approvals are available when you select the Expenses check box on the Services Procurement Bus Definition page.

The next table describes the delivered workflow values for expenses:

Transaction Registry ID	*Process Definition ID*	*User List Definition ID*	*Email Notification Template ID*
SP_EXPENSE	US001	SP_EX_PROVIDER SP_EX_WO_APPROVAL SP_EX_WO_REQUESTER	SP_Exp_Final_Approval SP_Exp_Final_Denial SP_Exp_On_Error SP_Exp_Rt_Approval SP_Exp_Request_Info SP_Exp_Request_Info_Added

Setting Up Progress Log Workflow

Progress log workflow approval enables you to approve progress on deliverable work orders to the project manager. Progress log approvals are available when you select the Progress Log check box on the Services Procurement Bus Definition page.

The next table describes the delivered workflow values for progress logs:

Transaction Registry ID	*Process Definition ID*	*User List Definition ID*	*Email Notification Template ID*
SP_PLOG	US001	SP_PLOG_WO_APPROVAL SP_PLOG_WO_REQUESTER SP_PL_PROVIDER	SP_Plog_Escalation SP_Plog_Line_Approved SP_Plog_Line_Denied SP_Plog_On_Error SP_Plog_Rt_Approval SP_Plog_Line_Req_Info SP_Plog_Line_Info_Added SP_Plog_Request_Info SP_Plog_Request_Info_Added

See Also

Chapter 21, "Managing Progress Logs," Viewing and Maintaining Progress Logs, page 547

Setting Up Timesheet Workflow

Timesheet workflow approval enables you to submit individual timesheets or incident lines for approval. Approvers can also adjust the timesheet, deny the approval of the timesheet, or place the approval on hold. After the timesheet is approved, you can create an invoice for it.

Timesheet approvals are available when you select the Timesheet check box on the Services Procurement Bus Definition page.

The next table describes the delivered workflow values for timesheets:

Transaction Registry ID	*Process Definition ID*	*User List Definition ID*	*Email Notification Template ID*
SP_TIMESHEET	SP_TIMESHEET	SP_TIME_PROVIDER SP_TIME_WO_APPROVAL SP_TIME_WO_REQUESTER	SP_Time_Escalation SP_Time_Final_Approval SP_Time_Final_Denial SP_Time_Line_Approval SP_Time_Line_Denied SP_Time_Line_Info_Added SP_Time_Line_Req_Info SP_Time_Line_Approved SP_Time_Line_Review SP_Time_On_Error SP_Time_PushedBack SP_Time_Request_Info SP_Time_Request_Info_Added SP_Time_Rt_Approval SP_Time_Rt_Review

See Also

Chapter 19, "Managing Time in PeopleSoft Services Procurement," Submitting and Approving Timesheets, page 499

Setting Up Invoice Approval Workflow

Invoice approval enables you to approve invoice line details, make adjustments to time line amounts, expenses, tax percentages, and enter comments before approving or rejecting invoice lines on a work order.

Note. Invoice approvals do not use the approval framework to process approvals. Instead, invoice approvals are accomplished using PeopleSoft Services Procurement worklist and notification pages.

Supplier approvers and internal approvers are defined on the work order and both can approve or reject an invoice. The value for the internal invoice approver appears by default from the requester or service coordinator defaults. The internal invoice approver must be specified in order to save the work order. The lookup contains all users with the role action of SP_INVOICE_APPROVER. The supplier invoice approver is only specified on the work order if the service supplier setup has been defined to require it. When applicable, the lookup contains all users with the role action SP_SPLR_INV_APPROVER who are associated to the supplier on the work order.

To set up invoice approval:

1. Assign user IDs to roles for use with invoices.

   The system provides the SP_INV_APPROVER roles.

2. Assign user IDs to role actions for use with invoices.

   The system provides the SP_INVOICE APPROVER role actions.

3. Define the notification template for use with notifications.

   You use the notification template SPF_INV_APPROVE.

4. Set up supplier-side approvals.

   The system routes a submitted invoice to the supplier invoice approver only if the Include Supplier in Invoice Approval check box is selected on the Services Supplier Info page.

See Also

Chapter 22, "Managing Settlements," Approving Invoices, page 588

Modifying Services Procurement Workflow Settings

This section describes how to:

- Change approval criteria.
- Change approvers.
- Change workflow templates.

Changing Approval Criteria

To change workflow approval criteria:

1. Access the Approval Process Definition page using the process ID value that you want to change.

2. Click Criteria to access the Criteria Definition page.

   For each path and step, you can set up criteria that the system uses to determine whether you go down that path or perform that step.

   For example, if you have an approval path that requires approval for work orders over 10,000 USD, the system looks at submitted work order, and compares the amount to the criteria on the Criteria page. If it is under 10,000, the system automatically approves it. If it is over 10,000, the system determines which step to perform.

3. Access the Approval Step Definition - Step page.

   Set the number of approvers needed. This determines how many levels or approval or number of approvers are required for the approval.

Changing Approvers

To update approvers:

1. Access the User List Definition page using the user list value that you want to update.
2. The system is set up to use the value for the Supervisor field that appears on the User Profile - Workflow page.

   If you want the workflow to select an approver by role, you can change the User List Source to Role, and select a role from the prompt table.

Changing Workflow Templates

To change a delivered workflow template:

1. Access the Generic Templates page.

   You can modify existing templates or create new ones using this page.
2. Add the new or revised template to the appropriate workflow action on the Approval Transaction Registry page using the Template Name field in the Notifications group box.

Reassigning Workflow Tasks

You can reassign tasks along the workflow process to other users, either temporarily or indefinitely. This enables a requester, approver or service coordinator to reassign a single task or all tasks during a specific date range. The system administrator can also assign user tasks either during a specific date range or indefinitely to another user.

This section discusses how to:

- Reassign tasks temporarily.
- Reassign tasks indefinitely.
- Reassign specific tasks.

Note. The user who assigns the task and the user who is assigned the task must have the same user role. For example, if a requester wants to assign worklist entries, then the user to whom the worklist entries are assigned must also be a requester.

Pages Used to Reassign Tasks

Page Name	*Definition Name*	*Navigation*	*Usage*
General Profile Information	USER_SELF_SERVICE	My System Profile	Reassign all tasks temporarily.
Workflow	USER_WORKFLOW	PeopleTools, Security, User Profiles, User Profiles, Workflow	Reassign all tasks either temporarily or indefinitely.
Worklist	WORKLIST_REASSIGN	Worklist, Worklist Details, Reassign	Reassign a specific task.

Reassigning Tasks Temporarily

Access the General Profile Information page (My System Profile).

Select the alternate user ID for the individual to whom you want to reassign your tasks during a specified duration of time.

Alternate User ID Select the user ID for the alternate user.

Reassigning Tasks Indefinitely

Access the User Profile - Workflow page (PeopleTools, Security, User Profiles, User Profiles, Workflow).

Use this page to reassign tasks to another user for an indefinite period of time.

Alternate User ID Enter the alternate user ID for the user to whom the work is to be reassigned. Normally, you use this field to specify another user to receive new worklist items while the user is temporarily away. The field is used in conjunction with the From Date and To Date fields.

Supervising User ID Enter the supervisor user ID for the user to whom the task is to be reassigned.

Reassign Work To Select the check box and select the user to whom the all current and future tasks are indefinitely reassigned. This field is meant to move existing worklist items to another user.

Reassigning Specific Tasks

Access the Worklist page (Worklist, Worklist Details, Reassign, and click the Reassign button).

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User ID	Enter the user ID.

Chapter 9

Establishing and Managing the MSP Environment

This chapter provides an overview of the Managed Services Provider (MSP) environment and discusses how to:

- Set up the MSP environment.
- Process MSP transactions.

Understanding the MSP Environment

In an MSP environment, the MSP manages requisitions from customers, and also takes on the role of service coordinator by sourcing requisitions to their own staff or third-party service providers. A markup is charged by the MSP for this service. In addition, the MSP may "host" external suppliers acting as service coordinators for their customers.

In order to support this business process, the concept of MSP markups is supported in the PeopleSoft Services Procurement product. MSP markup functionality is only active when the installation is set for an MSP environment. Suppliers that are part of the MSP's internal organization are identified when setting their source type to *Internal* in the supplier network.

Warning! If you set the installation options to an MSP environment, you will experience implications in the way rates are displayed and calculated throughout the system. Therefore this should only be done if the organization operates in an MSP environment.

Markups

When the MSP acquires resources, an additional markup is applied on top of the supplier's rate in order to cover the MSP cost for managing the process. You define the MSP fee at the business unit level, with override available at the service type level. The MSP fee is effective-dated, which indicates that the rate in effect at the time services are performed is the rate that is used for work order consumption and invoicing purposes.

The list below indicates the various ways in which MSP information is displayed to services coordinators, internal provider contacts, requesters, requisitions approvers, and external providers.

- Service coordinators and internal provider contacts view amounts that include MSP markup fees, as well as view the breakdown between supplier rate and MSP rate, which makes up the total amount shown.

- Requesters, requisition approvers, and work order approvers view amounts that include MSP markup fees, but they do not have visibility of the MSP markup amount that is included in the total amount shown unless they have been given a role associated with the role action for viewing the MSP breakdown.
- External provider contacts view amounts that do not include MSP markup.

  MSP markup fees are also included on the supplier invoice when the service provider is from an internal supplier.

Note. In the MSP environment, the filled amount for a requisition may not match the work order amount. This will occur if the MSP rate changes between creation of the requisition line and creation of the work order.

Common Element Used in This Chapter

The following definitions are used throughout this chapter.

Managed Services Provider (MSP)	An organization that manages the sourcing and filling of service requisitions on behalf of their customers.

Setting Up the MSP Environment

To define MSP percentage, use the MSP Fees by Business Unit (SPB_MSP_BY_BU) component. To define MSP percentage or rate, use the MSP Fee by Service Type (SPB_MSP_BY_SRVC) component.

To set up supplier by business unit, use the Supplier by Business Unit (SPM_SPLR_BY_BU) component.

This section discusses how to:

- Set up installation options.
- Define MSP by service type.
- Set up MSP fees by business unit.
- Set up the supplier network.

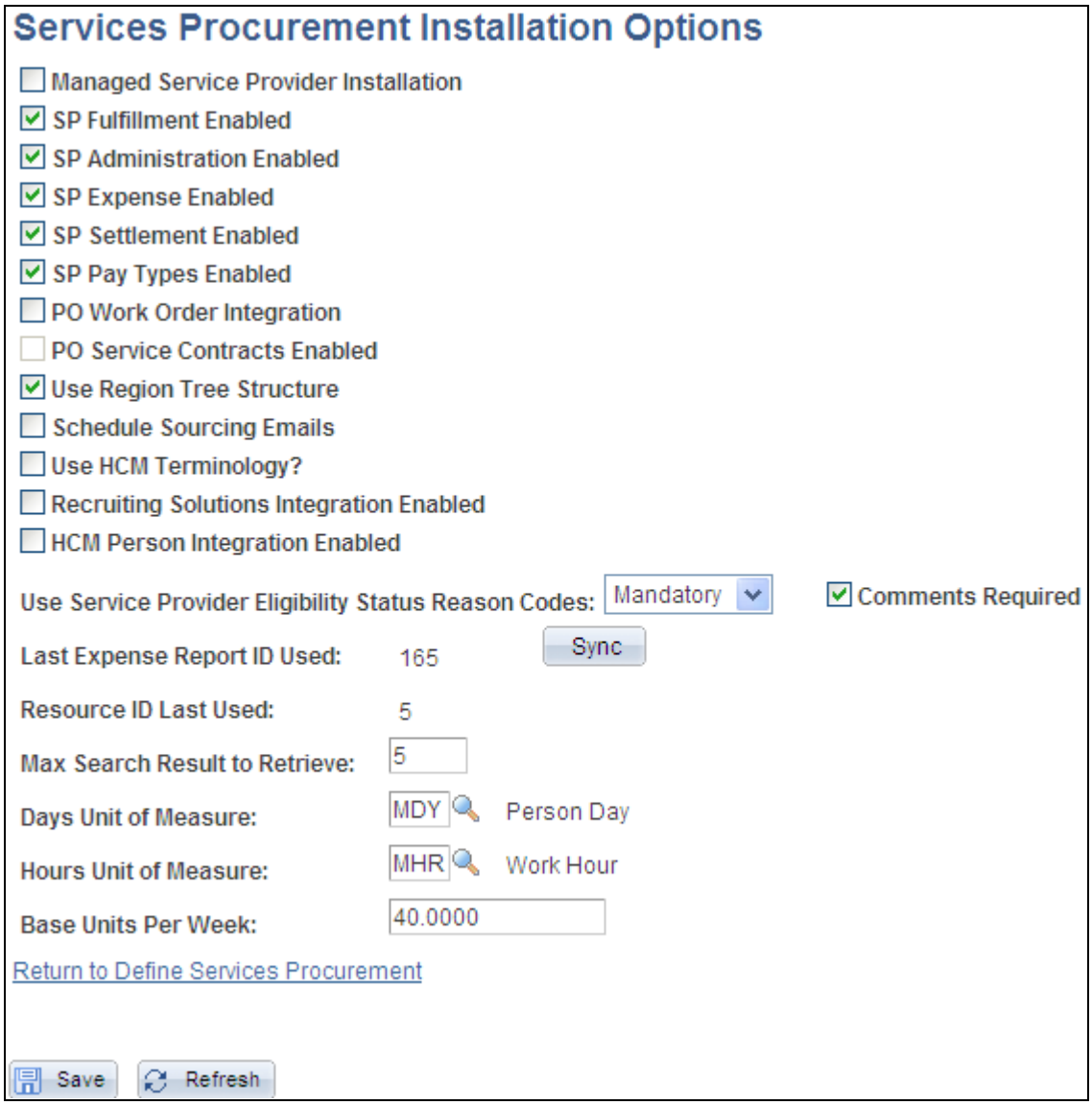
Pages Used to Set Up the MSP Environment

Page Name	*Definition Name*	*Navigation*	*Usage*
Services Procurement Installation Options	INSTALLATION_SP	• Set Up Financials/Supply Chain, Install, Installation Options, Services Procurement • Services Procurement, Define Services Procurement, General Setup, Installation Options	Define PeopleSoft Services Procurement installation options.
Services Procurement Business Unit Definition	BUS_UNIT_TBL_SP	• Set Up Financials/Supply Chain, Business Unit Related, Services Procurement, Services Procurement Options • Services Procurement, Define Services Procurement, General Setup, Business Unit Definition, Services Procurement Definition	Define PeopleSoft Services Procurement business units.
Service Types	SPB_ROLE_TYPE	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Services, Service Types • Services Procurement, Define Services Procurement, Service Setup, Service Type Setup, Service Types	Define service types.
MSP Fee by Service Type	SPB_MSP_BY_SRVC	Click the Manage MSP Fees button on the Service Types page.	Define the MSP fee percentage or rate.
MSP Fees by Business Unit	SPB_MSP_BY_BU	Click the Manage by MSP Fees button on the Services Procurement Business Unit Definition page.	Define MSP fees percentage.

Page Name	*Definition Name*	*Navigation*	*Usage*
Networked Supplier Details	SPM_SPLR_BY_BU_PG	• Services Procurement, Define Service Suppliers, Suppliers by Business Unit • Services Procurement, Define Services Procurement, Service Supplier Setup, Supplier Network Setup Click the Supplier link in the Supplier Network Setup page or select a new supplier and click the Add button.	Create the supplier network. Associate suppliers with PeopleSoft Services Procurement business units.

Setting Up Installation Options

Access the Services Procurement Installation Options page (Set Up Financials/Supply Chain, Install, Installation Options, Services Procurement).



Services Procurement Installation Options page

MSP Installation (managed services provider installation)

Click to enable the managed services provider functionality in PeopleSoft Services Procurement. This check box should not be selected unless the organization is an MSP.

If selected, the PO Work Order Integration and PO Service Contracts check boxes are disabled. The HCM Integration check box will also be disabled.

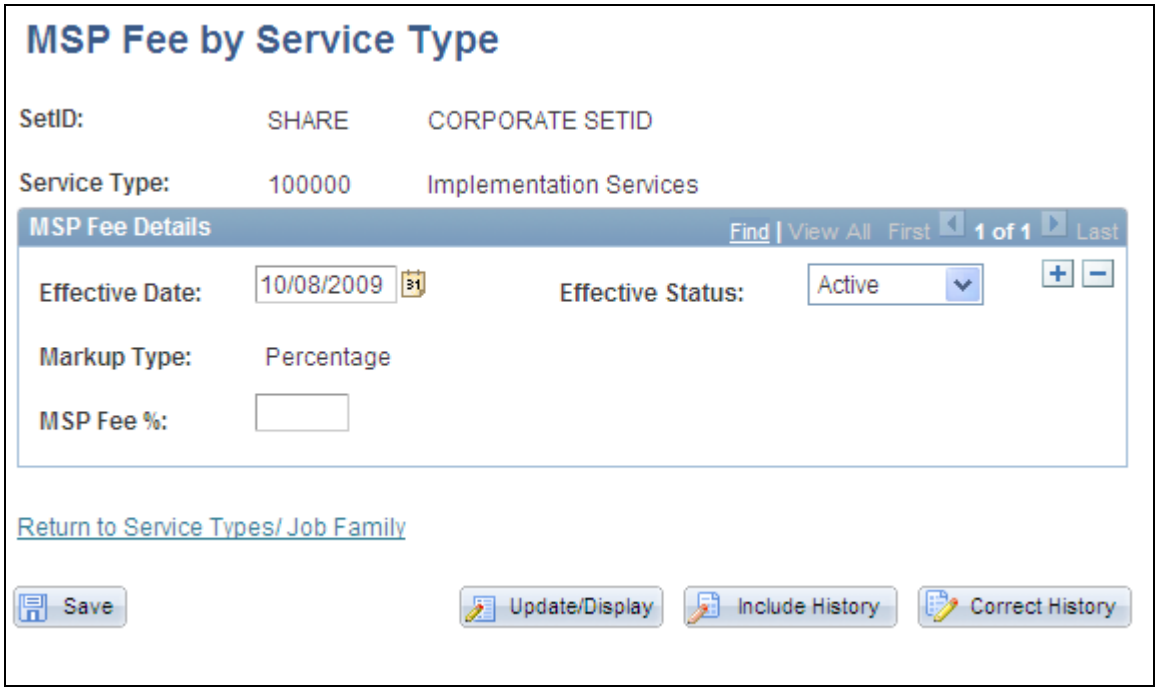
Conversely, if the PO Work Order Integration or HCM Integration check boxes are selected, the Managed Services Provider Installation check box is disabled.

See Also

PeopleSoft Application Fundamentals 9.1 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Defining Services Procurement Installation Options

Defining MSP by Services Type

Access the MSP Fee by Service Type page (Services Procurement, Define Services Procurement, Service Setup, Service Type Setup, Service Types, and click the Manage MSP Fees button on the Service Types page).



MSP Fee by Service Type page

Markup Type

For service types with a service method of *Resource*, select the markup type of *Percentage* or *Rate*.

Note. It is not possible to select Markup Type for service types with a service method of Deliverable. In this case only percentage markups are available.

Managed Services Provider Fee %

If the markup type is Percentage, enter a percentage by which the managed services provider will mark up the supplier rate for performing the service coordinator function.

Note. The MSP fee that you define on the Service Type page will override the business unit MSP and default onto requisitions, work orders, and timesheets. If there is no fee defined for the service type, the MSP fee defined at the business unit level will be used.

Rate

If the markup type is Rate, enter a rate by which the managed services provider will mark up the supplier rate for performing the service coordinator function.

Note. The MSP fee that you define on the Service Type page will override the business unit MSP and default onto requisitions and work orders. And, for individual child services associated to a multi-resource service, an MSP fee defined on the Service Type page will override the default MSP fee from the parent service timesheets. If there is no fee defined for the service type, the MSP fee defined at the business unit level will be used.

Unit of Measure

If the markup type is Rate, enter a unit of measure for the specified markup rate.

Setting Up MSP Fees by Business Unit

Access the MSP Fees by Business Unit page (click the Manage by MSP Fees button on the Services Procurement Business Unit Definition page).

MSP Fees by Business Unit page

The Manage by MSP Fees link will appear only when you select the Managed Services Provider Installation check box on the Services Procurement Installation Options page.

MSP Fee %

Enter a percentage by which the managed services provider will mark up the supplier rate for performing the service coordinator function.

See Also

Chapter 4, "Setting Up PeopleSoft Services Procurement," Setting Up Business Unit Definitions, page 32

Setting Up the Supplier Network

Access the Networked Supplier Details page (Services Procurement, Define Service Suppliers, Suppliers by Business Unit).

Source Type Select *Internal* to indicate that the supplier is part of the MSP organization for this business unit. If the service provider is internal, the supplier providing the services will view and be paid the fully loaded rates.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining the Supplier Network Setup, page 113

Processing MSP Transactions

This section discusses how to:

- Use MSP with requisitions.
- Source with MSP.
- Submit bids with MSP.
- Create batch invoices with MSP.
- View invoice line summaries with MSP.

Pages Used to Process MSP Transactions

Page Name	*Definition Name*	*Navigation*	*Usage*
Create Requisition	SPF_REQ_INFO_PG	Services Procurement, Create Requisition	Enter basic service requisition information.
Manage Requisition	PV_REQ_STATUS	Services Procurement, Manage Requisitions	Manage requisitions that are entered by the requester. You can review existing service requisitions, edit them, view their statuses, cancel them, or access related sourcing and work order information.

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Sourcing	SPF_SRC_MANAGE_PG	Services Procurement, Review and Source Requisitions	View all the suppliers to whom a requisition was sourced; source a requisition to multiple suppliers.
Sourcing Selection	SPR_SOURCE_SELECT	Click the Sourcing Select button on the Manage Sourcing page.	Enter sourcing requirements.
Incoming Bids	SPF_SUP_COM_IN	Services Procurement, Maintain Bids (external)	View incoming bids.
Supplier Sourcing Review	SPF_SOUR_REVIEW_SP	Services Procurement, Review Reqs/Submit Bids (external)	Review requisitions sourced to the supplier.
Submit Bid	SPF_SUBMITAL_PAGE	Click the Submit Bid button on the Supplier Sourcing Review page.	Submit bids.
Supplier Bid Response	SPF_SUP_BIDRSP1	Click the Create Bid button on the Incoming Bids - Summary page.	Reply to bids.
Work Order - Service	SPF_WO_REQ_VEN_DT	Services Procurement, Manage Services Work Orders Click the Add button or click an existing work order link on the Manage Services Work Order page.	Enter work order detail information.
Work Order - Cost	SPF_WO_COST_PO_PG	Click the Cost tab on the Work Order - Service page.	Enter cost information for the work order.
Create Batch Invoice	SPF_GEN_CLINV	Service Procurement, Services Settlement, Create Batch Invoices	Generate and print invoices.
Create Manual Invoice	SPF_INV_HDR_ADD	Services Procurement, Manage Invoices Select a business unit or invoice ID and click the Add button on the Manage Invoices page.	Create invoice header information.
Manage Invoice - Line Summary	SPF_INV_LN_DTLS	Click the Edit button for an invoice on the Manage Invoice page.	Modify the selected invoice.

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Invoice - Line Details	SPF_INV_TIME_DTL	For resource based invoices, click the Edit button on the Manage Invoices - Line Summary page.	View invoice line details or make adjustments.

Using MSP with Requisitions

Access the Create Requisition page (Services Procurement, Create Requisition).

Supplier Rate The portion of the total rate that will be paid to the end supplier, the sum of the supplier rate and the MSP rate equals the total rate. This field is displayed to users who have the SP_VMS_MSP_BREAKDOWN role action. The field does not display to requesters or approvers.

MSP Rate Displays the MSP rate for this requisition. This field displays to users having the SP_VMS_MSP_BREAKDOWN role action. The system provides this value from the MSP fee by service type, or if not present there, the MSP by business unit definition.

Rate The total rate for this requisition. If you are using a rate sheet, the system provides the default value from the rate sheet

If there is a rate sheet, the system adds the MSP rate to the Supplier Rate to calculate the rate.

MSP Fee % (managed services provider fee percentage) Displays the MSP fee percentage for this requisition. This field displays to service coordinators only.

See Also

Chapter 14, "Creating and Managing Services Procurement Requisitions," page 285

Sourcing with MSP

Access the Sourcing Selection page.

MSP Rate Displays the MSP rate for this requisition. This field displays to Service Coordinators and MSP supplier contacts only. The system provides this value from the MSP fee by service type, or if not present there, from the MSP by business unit definition.

Loaded Rate Displays the total rate for this requisition, supplier rate plus MSP Rate.

See Also

Chapter 15, "Managing PeopleSoft Services Procurement Sourcing," page 339

Submitting Bids with MSP

Access the Submit Bid page (Services Procurement, Review Reqs/Submit Bids (external), and click the Submit Bid button on the Supplier Sourcing Review page).

Note. Only internal suppliers will be able to view the MSP rates and amounts during bid negotiations.

See Also

Chapter 16, "Submitting and Managing Bids," page 367

Creating Batch Invoices with MSP

Access the Create Invoice page (Service Procurement, Services Settlement, Create Batch Invoices).

Internal Supplier	Select to indicate that the supplier is internal and that the MSP markup will be included in the invoice amount.

See Also

Chapter 22, "Managing Settlements," page 559

Viewing Invoice Line Summaries with MSP

Access the Manage Invoices - Line Summary page (Services Procurement, Manage Invoices, and click the Edit button for an invoice on the Manage Invoice page.

Estimated Tax	The MSP fee is not included in the tax calculation for external suppliers, but is for internal suppliers.
Estimated Total	The MSP fee is included in the totals for internal suppliers.

See Also

Chapter 22, "Managing Settlements," page 559

Chapter 10

Establishing and Managing VMS

This chapter provides an overview the Vendor Managed Services (VMS) and discusses how to:

- Set up VMS.
- Process VMS transactions.

Understanding VMS

The VMS provider manages enterprise service requests, and also takes on the role of service coordinator by routing service requests to multiple staffing suppliers. VMS providers manage the fulfillment process by maintaining work orders, time reports, and invoicing for the enterprise. VMS providers are paid for all services performed by the suppliers in their network at a rate that includes the VMS markup rate or percentage.

In order to support this business process, the concept of VMS is supported in the PeopleSoft Services Procurement product. VMS functionality is only active when you select the Enable VMS option for a Services Procurement business unit or service type. The service type level is an override to the business unit. Once you enable the VMS option, you must specify a VMS supplier and location, as well as a rate and supplier service coordinator or service team that correspond to the VMS provider in order to create VMS managed requisitions and work orders for the business unit.

Note. A service team must have a least one coordinator associated with the VMS supplier to be available for selection as a VMS team.

Markups

When the VMS provider acquires resources, an additional markup is applied on top of the supplier's rate in order to cover the VMS cost for managing the process. You define the VMS fee at the business unit level, with override available at the service type level. For individual child services, VMS fees defined at the service type overrides the VMS fees defaulting from the related multi-resource parent. The VMS fee is effective-dated, which indicates that the rate in effect at the time services are performed is the rate that is used for work order consumption and invoicing purposes.

The list below indicates the various ways in which VMS information is displayed to services coordinators, requesters, approvers, supplier service coordinator and service coordinator teams.

- Service coordinators and provider contacts internal to the VMS can view amounts that include VMS markup fees, as well as view the breakdown between supplier rate and VMS rate, which makes up the fully loaded rate.

- Requesters, requisition approvers, and work order approvers view amounts that include VMS markup fees, but they do not have visibility of the VMS markup amount that is included in the total amount shown unless they have been given a role associated with the SP_VMS_MSP_BREAKDOWN role action.
- Sourcing notification routes to the supplier service coordinator or service coordinator team defined for the VMS.

  The service coordinator or team then sources the requisition to suppliers in the VMS supplier network. The VMS markup information is visible to the VMS Service Coordinators and suppliers internal to the VMS.

  Note. VMS rates are not visible to external suppliers.

- External provider contacts view amounts that do not include VMS markup.

  VMS markup fees are included on all supplier invoices for VMS managed work orders. These invoices are generated for the VMS supplier rather than the end supplier.

Common Elements Used in This Chapter

VMS (vendor managed services)	Provides a single point of contact for an enterprise for their services needs. A VMS provider can route approved service requests to multiple staffing services suppliers for fulfillment and then manage the work order, time reporting, and invoice settlement processes for those service companies.
Third Party Supplier	The service provider who performs the service works for a third party supplier.
Fully Loaded Rates	Includes both the supplier rate and the VMS markup rate.

Setting Up VMS

To define VMS by business unit and service type, use the VMS by Business Unit and Service Type (SPB_VMS_BUSRVC_LST) component.

To define VMS by business unit, use the VMS by Business Unit (SPB_VMS_BY_BU) component. To define VMS percent by business unit, use the VMS Percent by Business Unit (SPB_VMS_INFO_BU) component.

To define VMS details by supplier, business unit, and service type, use the VMS Details by Supplier, Business Unit, and Service Type (SPB_VMS_INFO_SRV) component.

To change the VMS service coordinator, use the Replace VMS Coordinator component (SPB_REPL_VMS_SC).

This section discusses how to:

- Enable the VMS option for a Business Unit.
- Define VMS suppliers by business unit.

- Define VMS details by supplier and business unit.
- Define VMS supplier by business unit and service type.
- Define VMS details by supplier, business unit, and service type.

Pages Used to Set Up VMS

Page Name	*Definition Name*	*Navigation*	*Usage*
Services Procurement Bus Unit	BUS_UNIT_TBL_SP	• Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Defn • Set Up Financials/Supply Chain, Business Unit Related, Services Procurement, Services Procurement Options	Define PeopleSoft Services Procurement business units. Define your own consolidation structures for accounting and reporting purposes.
VMS Supplier by Business Unit	SPB_VMS_BY_BU	Click the Manage VMS Supplier link on the Services Procurement Bus Unit page.	Define the effective-dated VMS vendor and vendor location information.
VMS Details by Supplier and Business Unit	SPB_VMS_INFO_BU	Click the Manage VMS Details button on the VMS Suppliers by Business Unit page.	Define effective-dated fees by percentage and assign related service coordinator or coordinator team for VMS by business unit.
VMS Supplier by Business Unit and Service Type	SPB_VMS_BU_SRVC	• Click the VMS by BU and Service Type link on the Services Procurement Bus Unit page. • Services Procurement, Define Services Procurement, Service Type Setup, VMS by BU and Serv Type	Use this page to indicate whether there is an override of the business unit VMS settings for this service type and view the current VMS supplier and location.
VMS Details by Supplier, Business Unit, and Service Type	SPB_VMS_INFO_SRVC	Click the Manage VMS Details button on the VMS Supplier by BU and Service Type page.	Use this page to define effective-dated VMS markups and assign related service coordinator or team by business unit and service type.

Enabling the VMS Option for a Business Unit

Access the Services Procurement Bus Unit page (Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Defn).

Enable VMS Select to determine whether requisitions or work orders are under VMS management by default. If you select this option, you can define markup costs that are charged by the VMS for service that do not have a service type level VMS override defined.

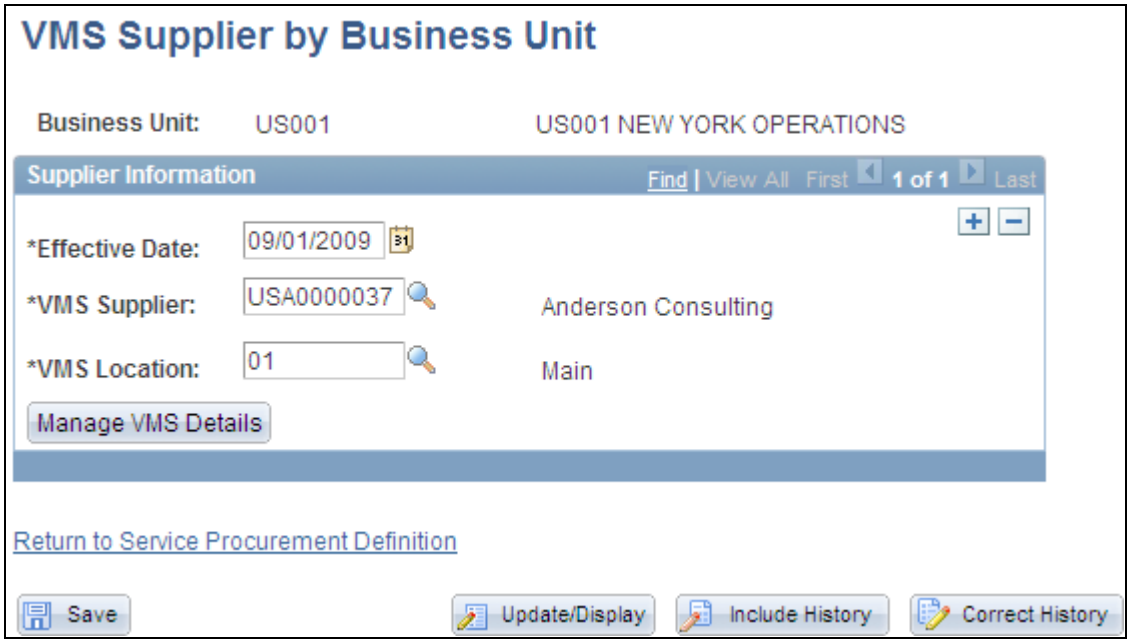
If you disable this option and there are existing VMS rows, the system populates a warning message to inform you that the VMS rows are ignored when creating new requisitions and work orders.

Note. VMS functionality is not available if you have selected the MSP installation option on the Services Procurement Installation Options page.

Note. If you select this option, you must define at least one VMS supplier and VMS fee for the designated business unit.

Defining VMS Suppliers by Business Unit

Access the VMS Supplier by Business Unit page (click the Manage VMS Supplier link on the Services Procurement Bus Unit page).



Services Procurement Definition

Effective Date Enter the date to indicate when the rate is in effect. This date is used to determine the appropriate rate at the time services are performed for work order consumption and invoicing purposes.

VMS Supplier Enter the name of the supplier that will provide vendor management for the specified business unit.

VMS Location Enter the location of the supplier that will provide vendor management for the specified business unit.

Defining VMS Details by Supplier and Business Unit

Access the VMS Details by Supplier and Business Unit page (click the Manage VMS Details button on the VMS Suppliers by Business Unit page).

VMS Details by Supplier and Business Unit page

VMS Percent Enter VMS fee percentage.

Service Coordinator Select to identify a specific service coordinator as the VMS provider.

Service Coordinator Team Select to identify an entire service coordinator team as the VMS team.

Coordinator Select a specific service coordinator.

Note. This option only appears when the Service Coordinator option is selected.

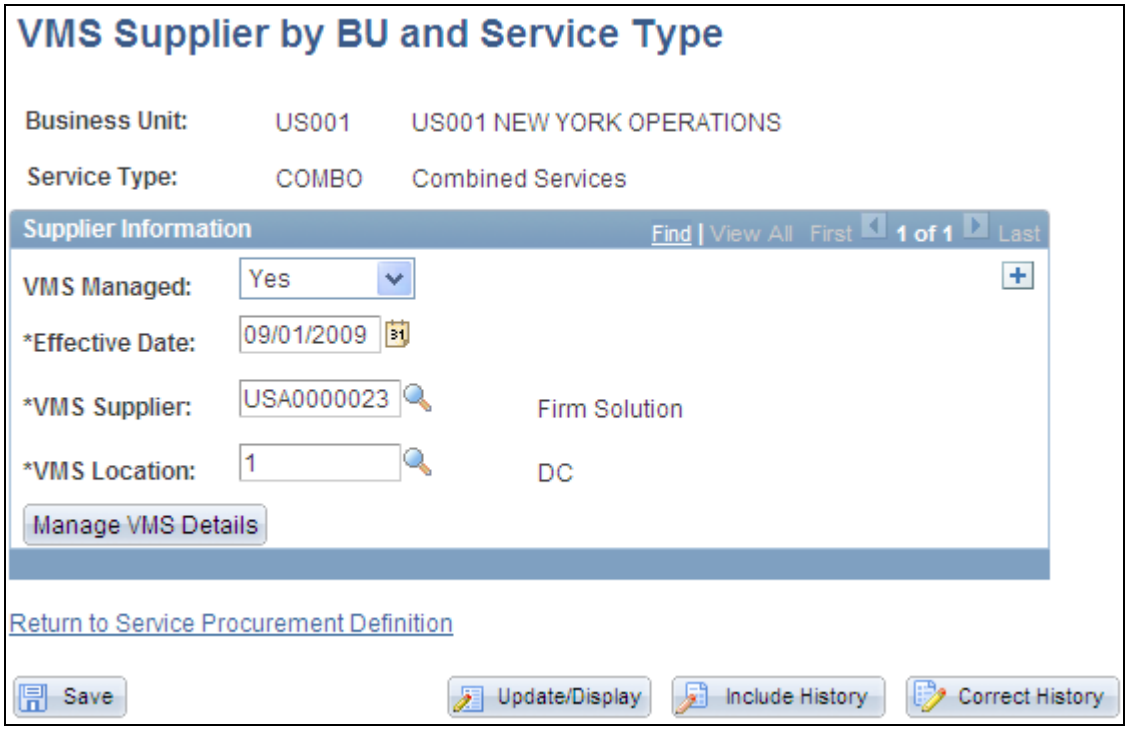
Service Team Select a specific team of service coordinators.

Note. This option only appears when the Service Coordinator Team option is selected.

Note. Rate based VMS fees are defined at the Service Type level only.

Defining VMS Suppliers by Business Unit and Service Type

Access the VMS Supplier by BU and Service Type page (click the VMS by BU and Service Type link on the Services Procurement Bus Unit page).



VMS Supplier by BU and Service Type page

VMS Managed

Select an available effective-dated VMS managed option: Values include Yes, No, and BU (business unit).

Yes: If you select this option, the VMS Supplier and VMS Location fields, and the Manage VMS Details button is available.

Note. You must associate a VMS supplier and location, and related VMS details for the supplier, business unit, and service type when you select this option.

No: If you select this option, requisitions created for this effective date will not be VMS Managed.

BU: If you select this option, requisitions or work orders created for this effective date will follow the VMS setup defined at the Business Unit level.

Manage VMS Details

Click to access the VMS Details by Supplier, Business Unit, and Service Type page, where you can define rates and service coordinator or team for the VMS.

Defining VMS Details by Supplier, Business Unit, and Service Type

Access the VMS Details by Supplier, Business Unit, and Service Type page (click the Manage VMS Details button on the VMS Supplier by BU and Service Type page).

VMS Details by Supplier, Business Unit, and Service Type page

The markup types available depends on the selected service type. Deliverable and Multi Resource service types must have a markup type of *Percentage*, but resource service types can have a markup type of either *Percentage* or *Rate*. The other fields on the page vary based on the selected markup type. When the markup type is *Percentage*, the *VMS Percent* field appears on this page. However, when the markup type is *Rate*, the VMS Rate,Currency, and UOM (unit of measure) fields appear on this page.

Markup Type

For service types with a service method of *Resource*, select the markup type of *Percentage* or *Rate*.

Note. It is not possible to select Markup Type of Rate for service types with a service method of Deliverable or Multi Resource. In this case, only percentage markups are available.

Processing VMS Transactions

This section discusses how to:

- Use VMS with requisitions.
- Use VMS with requisition management.
- Use VMS with sourcing and bid management.

- Use VMS with work orders.
- Use VMS with invoices.

Pages Used to Process VMS Transactions

Page Name	*Definition Name*	*Navigation*	*Usage*
Create Requisition	SPF_REQ_INFO_PG	Services Procurement, Create Requisition	Enter basic service requisition information.
Manage Requisition	PV_REQ_STATUS	Services Procurement, Manage Requisitions	Manage requisitions that are entered by the requester. You can review existing service requisitions, edit them, view their statuses, cancel them, or access related sourcing and work order information.
Manage Sourcing	SPF_SRC_MANAGE_PG	Services Procurement, Review and Source Requisitions	View all the suppliers to whom a requisition was sourced; source a requisition to multiple suppliers.
Sourcing Selection	SPR_SOURCE_SELECT	Click the Sourcing Select button on the Manage Sourcing page.	Enter sourcing requirements.
Incoming Bids	SPF_SUP_COM_IN	Services Procurement, Maintain Bids (external)	View incoming bids.
Supplier Sourcing Review	SPF_SOUR_REVIEW_SP	Services Procurements, Review Reqs/Submit Bids (external)	Review requisitions sourced to the supplier.
Submit Bid	SPF_SUBMITAL_PAGE	Click the Submit Bid button on the Supplier Sourcing Review page.	Submit bids.
Supplier Bid Response	SPF_SUP_BIDRSP1	Click the Create Bid button on the Incoming Bids Summary - Inbox page.	Reply to bids.
Work Order - Service	SPF_WO_REQ_VEN_DT	Services Procurement, Manage Services Work Orders Click the Add button or select an existing work order link on the Manage Services Work Order page.	Enter work order detail information.

Page Name	*Definition Name*	*Navigation*	*Usage*
Work Order - Cost	SPF_WO_COST_PO_PG	Services Procurement, Manage Services Work Orders Click the Cost tab on the Work Order - Service page.	Enter cost information for the work order.
Create Batch Invoice	SPF_GEN_CLINV	Service Procurement, Services Settlement, Create Batch Invoices	Generate and print invoice.
Create Manual Invoice	SPF_INV_HDR_ADD	Services Procurement, Manage Invoices Enter Business Unit and/or Invoice ID and click the Add button on the Manage Invoices page.	Create invoice header information.
Manage Invoice - Line Summary	SPF_INV_LN_DTLS	Click the Edit button for an invoice on the Manage Invoice page.	Modify the selected invoice.
Manage Invoice Line Details	SPF_INV_TIME_DTL	For resource based invoices, click the Edit button on the Manage Invoices - Line Summary page.	View invoice line details and/or make adjustments.
Replace VMS Service Coordinator	SPB_REPL_VMS_SC	• Services Procurement, Maintain Users, Replace VMS Coordinator • Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup, Replace VMS Coordinator • Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup Select a person ID in #3, and then click the Edit Service Provider link in 4. Click the Replace VMS Coordinator link.	Use this page to replace VMS service coordinators.

Using VMS with Requisitions

Access the Create Requisitions page (Services Procurement, Create Requisition).

If a requisition is under VMS management, the VMS rate, service coordinator or team ID, percentage information, and VMS supplier and supplier location fields appears on the requisition page. The system checks to ensure that the VMS option is specified at the BU or BU and Service type level.

Note. When the requisition is under VMS management, the fully loaded rate that displays on the requisitions includes VMS markups.

See Also

Chapter 14, "Creating and Managing Services Procurement Requisitions," page 285

Using VMS with Requisition Management

Access the Manage Requisitions page (Services Procurement, Manage Requisitions).

This page displays fully loaded prices that include the VMS markup for requisition lines that are VMS managed.

Note. If a user has the role action to view the breakdown of VMS rates, the supplier rate, the VMS markup rate, and the fully loaded rate appear on the requisition.

See Also

Chapter 14, "Creating and Managing Services Procurement Requisitions," Managing Service Requisitions, page 314

Using VMS with Sourcing and Bid Management

Access the Sourcing Selection page (Services Procurement, Review and Source Requisitions, and click the Sourcing Select button on the Manage Sourcing page).

This page displays fully loaded prices that include the VMS markup for requisition lines that are VMS Managed, as well as the breakdown between supplier rate and VMS markup.

The VMS breakdown also appears on the bid management pages for service coordinators and service provider contacts associated with the VMS supplier. Service provider contacts not associated with the VMS supplier only see the rate before VMS.

See Also

Chapter 15, "Managing PeopleSoft Services Procurement Sourcing," page 339

Using VMS with Work Orders

Access the Work Order - Details page.

This page displays VMS Managed information such as VMS supplier and supplier location. If the work order is not under VMS management, no VMS information appears on the work order. If a work order is linked to a requisition, all VMS information defaults onto the work order.

The rate that displays on the work order includes the VMS markup. The VMS markup calculation is based on the markup type defined for the business unit or service type and business unit.

Note. When the markup type is defined as percentage, the system fetches the effective-dated VMS percentage from the setup tables and overrides the requisition VMS percentage with the new effective date percentage on work order.

When the markup type is defined as rate, the system fetches the effective-dated VMS rate, currency, and unit of measure information from the setup tables and overrides the requisition VMS rate with the new effective date VMS rate on work order.

See Also

Chapter 18, "Managing Work Orders," page 413

Using VMS with Invoices

Access the Create Invoice page (click the Add button on the Manage Invoices page).

VMS Managed	Select to view VMS managed work order time and progress logs that are available for selection. All invoices for VMS managed work orders are consolidated for end suppliers under the same VMS supplier. Invoices are paid to the VMS supplier for all suppliers under their management.

Note. This option is only available if there is a VMS supplier selected.

See Also

Chapter 22, "Managing Settlements," Creating Invoices, page 562

Chapter 11

Using Service Contracts

This chapter provides an overview of service contracts and discusses how to create service contracts.

Understanding Service Contracts

You must have PeopleSoft Purchasing installed to take advantage of service contracts. Service contracts are used to secure standard rates with suppliers to hire service providers at specific rates.

When service coordinators source a requisition and include contract suppliers, the system finds all the contract suppliers that match the role and unit-of-measure combination. Service contracts are only applicable to resource-based roles that have a rate associated with them or to category contracts for a category associated to a Services Procurement service type. Category adjustments are only applied when a rate sheet is available to use as the base rate from applying the adjustment. For example, if the rate sheet is for 45 USD an hour and a category-based contract exists for a reduction of 10%, the contract rate will be considered as 40.50 USD an hour and that rate will be compared to the bid or work order rate.

When suppliers bid on a requisition, the system checks for the category or the role, unit of measure, and vendor location to verify whether they match a current contract. If a match is found, the system enforces that the bid rate is less than or equal to the contract rate. You are not required to award bidders with a contract; they are treated as just another bidder. When the requisition is filled, the system uses the lower rate from the Filled Rate field to create the work order. The system takes the currency from the contract header and the merchandise amount is the rate-per-hour.

If PeopleSoft Purchasing is installed and you are integrating work orders with purchase orders, then when the work order is released, the system verifies against the contract again and overrides the work order rate with the contract rate if necessary. If a new contract becomes active between the time that the supplier bids on the requisition and the time that the purchase order was created, the purchase order uses the most current contract price and the work order is updated to match that price upon its release.

For example, you could have a contract with a supplier to provide construction services at the rate of 45 USD an hour. You source a requisition for a contracting job, and the supplier attempts to bid 48 USD an hour for the job. The system enforces the contract rate and requires the supplier to bid at or below the contract rate. The bid would be filled and the work order created for the rate of 45 USD an hour. If a new contract is subsequently negotiated for a rate of $42 USD an hour prior to creation of the purchase order and release of work order, the system adjusts the work order rate down to the 42 USD an hour rate during the work order release.

Creating Service Contracts

This section discusses how to:

- Create service contracts.
- Use service contracts in bidding.
- Use service contracts with purchase orders.

Pages Used to Create Service Contracts

Page Name	*Definition Name*	*Navigation*	*Usage*
Contract	CNTRCT_HDR	• Services Procurement, Requisition Fulfillment, Maintain Contracts • Procurement Contracts, Add/Update Contracts • Supplier Contracts, Create Contracts and Documents, Contract Entry	Use to create service contracts.
Maintain Details - Details for Line	CNTRCT_PRC_UOM_SEC	Click the Line Details button on the Contract page.	Enter rates for service contracts.

Creating Service Contracts

Access the Contracts page (Services Procurement, Requisition Fulfillment, Maintain Contracts).

Note. You must enable service contracts on the Installation Options - Services Procurement page to add service contracts.

See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Defining Services Procurement Installation Options.

To create a service contract:

1. Create a new contract.

   You can select *General Contract,Purchase Order*, or *Release to Single PO Only* types to use for purchase orders. For more information about contract types, see the *PeopleSoft Source to Settle 9.1 PeopleBook.*

   See *PeopleSoft Source-to-Settle Common Information 9.1 PeopleBook*, "Using Voucher and Order Contracts," Contract Process Options.

2. Select *Role* as the type.
3. Enter the resource-based project role as the type ID.
4. Access the Details for Line page.
5. Add the negotiated rate for the vendor location in the Base Price field.

6. Approve the contract by changing the contract status to *Approved.*

See Also

PeopleSoft Source-to-Settle Common Information 9.1 PeopleBook, "Using Voucher and Order Contracts"

PeopleSoft Purchasing 9.1 PeopleBook, "Creating Requisitions Online," Understanding How to Apply Procurement Contract Prices to Transactions

Using Service Contracts in Bidding

To check for contract rates on bids:

1. Enter and source a requisition.

   Service coordinators have visibility into those vendors who have contracts.

2. Suppliers bid on the requisition.

3. If the supplier, role, unit of measure, and location match the contract, the system prevents the service provider contact from submitting a rate greater than the contract rate.

Using Service Contracts with Work Orders

To check for contract rates with work orders:

1. Create a work order.

2. Once the work order is approved, create a purchase order.

If the supplier, role, currency, and location match the contract, the system uses the contract rate if it is less than the work order rate. The system overrides the work order rate with the contract rate when the work order is released.

For multi-resource services, the link to purchase orders is at the parent, multi-resource service level; however, contract rates will be enforced for the lower-level individual child service bids and work orders.

Note. Contracts are verified during the work order creation process as well as the sourcing process.

Chapter 12

Managing Services Projects

This chapter provides an overview of projects and discusses how to:

- Create services projects.
- Manage services projects.

Understanding Services Projects

PeopleSoft Services Procurement facilitates managing projects by enabling service providers to log time directly against work orders and activities that are associated with projects.

When you use projects in PeopleSoft Services Procurement, you can enter and modify project details. You can search or sort projects by different criteria, and you can access the Project Activities page to define activities by project when Project Costing is installed.

Note. Service Projects are only associated to requisitions and work orders through the ChartField distribution. Projects are only available in PeopleSoft Services Procurement if the ChartField configuration is defined with the project ChartField set to a status of Active.

See Also

Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining Project and Activities Definitions, page 70

Prerequisites

Set up the following attributes before entering project information when the Project Costing product has been installed:

- Project business units and business unit options.
- Project types.

See Also

Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining Project and Activities Definitions, page 70

Chapter 4, "Setting Up PeopleSoft Services Procurement," Setting Up Business Unit Definitions, page 32

Creating Services Projects

To create services projects, use the Services Projects (SPA_PROJECT) component.

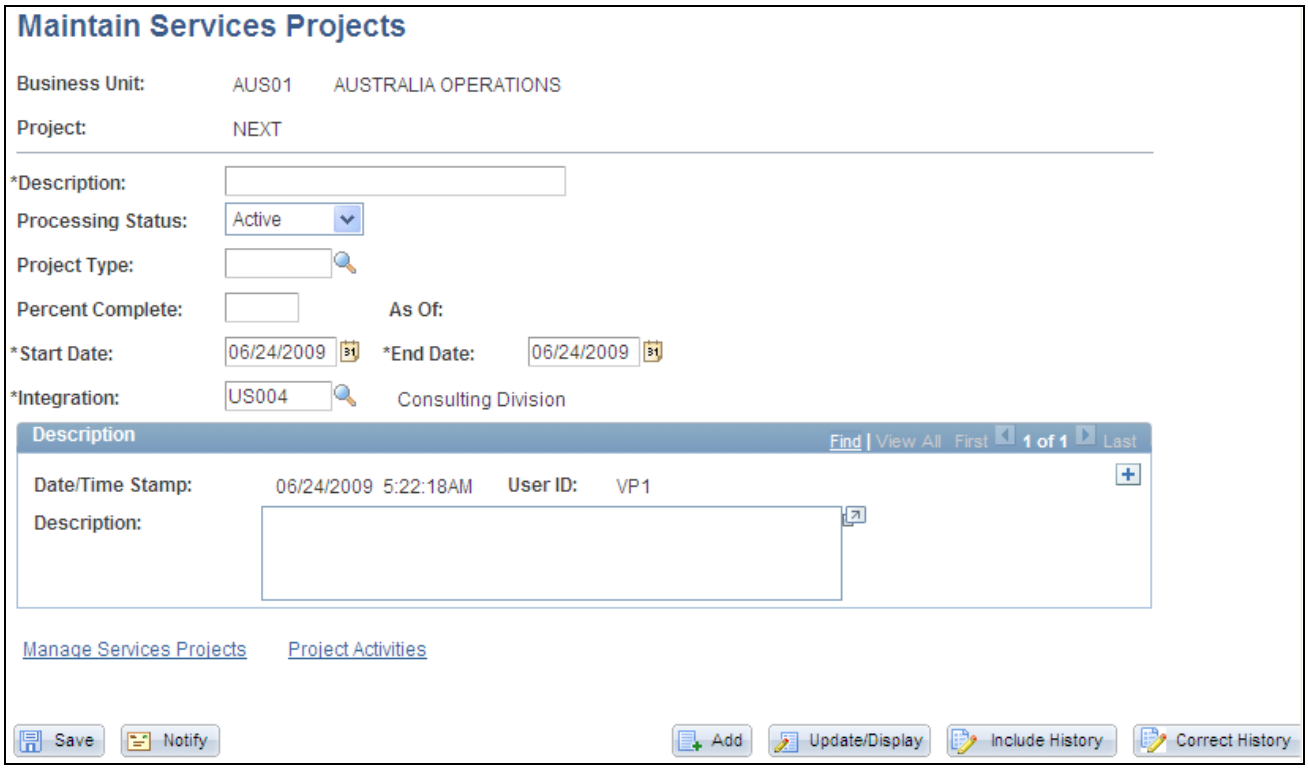
This section discusses how to enter general project information.

Pages Used to Create a Service Project

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Services Projects	SPA_MANAGE_PROJ	Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Services Projects	View, search, and sort the list of available projects. Access the project that you want to modify.
Maintain Services Projects	SPA_PROJECT	Click the Add button on the Manage Services Projects page.	Enter general project information.

Entering General Project Information

Access the Maintain Services Projects page (Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Services Projects and click the Add button on the Manage Services Projects page).



Maintain Services Projects page

Description	Enter the project description.
Processing Status	Select a processing status of *Active* or *Inactive*. If you have the PeopleSoft Project Costing installed, you may have projects with a processing status of *Pending*. Pending projects are not accessible from the Services Projects page. You must navigate to PeopleSoft Project Costing to access pending projects.
Project Type	Select a project type to group similar projects together.
Percent Complete	Enter a project completion percentage. When you save the page, the system updates the As Of field with the current date and time.
Start Date and **End Date**	Enter the project start and end dates. These are provided as a default on the service requisition and work order.
Integration	Appears if you have installed PeopleSoft Project Costing. Enter a business unit to define the PeopleSoft Project Costing-General Ledger integration template that the system uses to send transactions from PeopleSoft Project Costing to PeopleSoft General Ledger.
Date Time Stamp	Displays when the project was created.
User ID	Displays who created the project.

Description Enter extended project comments.

Project Activities Click to access the Project Activities page where you can add or update activity information.

Managing Services Projects

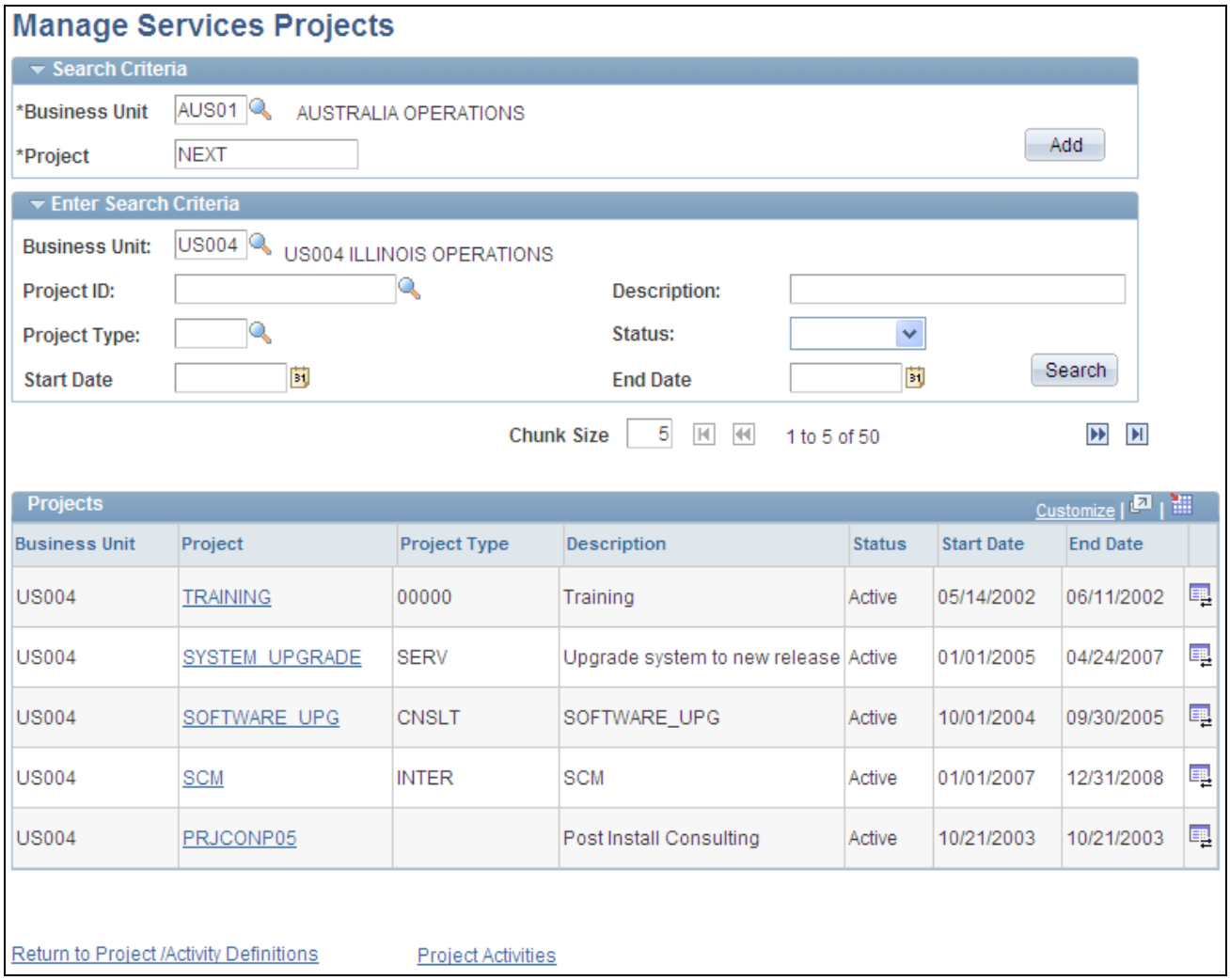
This section discusses how to view, search, and sort projects.

Pages Used to Manage Services Projects

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Services Projects	SPA_MANAGE_PROJ	Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Services Projects	View, search, and sort the list of available projects. Access the project that you want to modify.
Maintain Services Projects	SPA_PROJECT	Click the Add button on the Manage Services Projects page.	Enter general project information.

Viewing, Searching, and Sorting Projects

Access the Manage Services Projects page (Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Services Projects).



Manage Services Projects page

Projects

Project Click a project name link to access the Maintain Services Project page.

Click to access the Project Activities page and view the activity that is associated to the project.

Note. This option is only available when PeopleSoft Project Costing is installed.

Chapter 13

Managing Services Activities

This chapter provides an overview of activities in PeopleSoft Services Procurement and discusses how to:

- Define activities when project costing is not installed.
- Manage activities.

Understanding Activities in PeopleSoft Services Procurement

Activities are specific tasks that you allocate time or progress against. When Project Costing is not installed, activities are generic, not related to projects, and are associated to work orders based on service type or service. Use activities to further define the work order scope.

Understanding Activities When PeopleSoft Project Costing is Installed

When Project Costing is installed, activities are associated to specific projects. This is typically used when service providers are assigned to work on multiple projects in multiple departments concurrently. Use activities on timesheets to break down the various costs that are associated with a project or work orders. In this scenario, any project for which you incur costs directly must contain at least one activity.

Note. When you associate a project to an activity, you must have a project business unit and project defined as a ChartField in order to charge time or progress against it.

Understanding ChartFields When PeopleSoft Project Costing is Installed

Use the Standard ChartField Configuration page to determine which ChartFields are available to use on requisitions and work orders. The values that default onto each ChartField on a requisition line or manual work order come from the business unit or user defaults. You can specify multiple ChartField combinations on a requisition. Those combinations are editable until the requisition line is submitted for approval. ChartField combinations are carried over when a work order is created from a requisition. Whether a work order is created manually or is linked to a requisition line, the ChartField combinations specified on the work order may only be modified until a certain point, depending on whether there are related purchase orders or existing time sheets.

When purchase order integration is enabled, you cannot make changes to the distribution after the purchase order has been created. When purchase order integration is not enabled, it is possible to modify the distributions until a time sheet has been created. If the actual allocation method is used for the work order, new distributions may be added even after a time sheet has been created, but existing distribution lines may not be deleted or changed. The ChartField combinations from the work order are subsequently used in the integration with PeopleSoft Purchasing and Accounts Payables.

Prerequisite

When Project Costing is installed, you must create a project in PeopleSoft Project Costing or PeopleSoft Services Procurement before you can assign activities to it.

Managing Activities When Project Costing is Not Installed

This section discusses how to:

- Define service activity information.
- Associate activities by service.

You can also associate activities by service type.

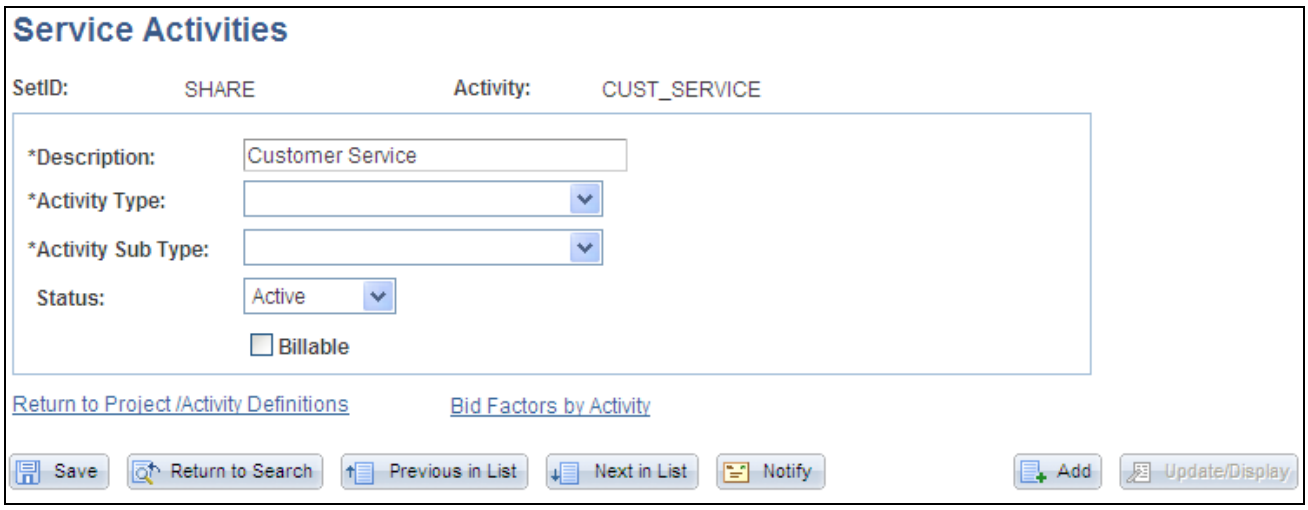
Pages Used to Manage Activities When Project Costing is Not Installed

Page Name	*Definition Name*	*Navigation*	*Usage*
Service Activities	SPB_SETID_ACTIVITY	Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Service Activities	Define service activities. **Note.** The Project Activities page (SPA_PROJ_ACT) is used for activities when Project Costing is installed. The Service Activities page (SBP_SETID_ACTIVITIES) is used to maintain Service Activities when Project Costing is not installed
Maintain Activities by Service Type	SP_ACT_BY_SVTYP	Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Activities by Service Type	Select a service type and associate activities to it.
Activities by Service	SPB_SRC_ACT	Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Activities by Service	Select a service and associate activities to it.

Page Name	Definition Name	Navigation	Usage
Work Order Activities	SPF_WO_ACT (resource based), SPF_PRLOG_MS_PG (deliverable-fixed) SPF_WO_RATE_ACT (deliverable-rate based), SPF_PRGLOG_MS_PG (deliverable-milestone)	Services Procurement, Manage Services Work Order Click the existing work order, select the Work Order - Cost tab, and then click the Activities link.	Select activities to associate with the work order.

Define Service Activity Information

Access the Service Activities page (Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Service Activities).



Services Activities page

Description Enter the activity description.

Activity Type Select to indicate whether the activity is resource or deliverable-based.

Activity Sub Type Depending on the value that you select in the Activity Type field, the system dynamically displays values.

If you select *Resource* as the activity type, the system returns values of *Generic Activity* and *Specific Activity.*

If you select *Deliverable* as the activity type, the system returns values of *Milestone* and *Rate Based.*

Status Select the activity status. Values are *Active* or *Inactive.*

Billable Select if the activity is billable.

Bid Factors by Activity Click to access the Bid Factors by Activity page. You use the page to view or add bid factors to an activity.

Associating Activities by Service

Access the Activity by Service page (Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Activities by Service).

Activity Select an existing activity to associate with a service.

Allow Delete Activity Select to enable the deletion of activities from the Activities by Requisition page when creating a deliverables-based requisition for the service. If you do not select this option, you can delete activities from the Activities by Requisition page when creating a requisition for the service.

Managing Activities when Project Costing is Installed

This section discusses how to modify an activity.

Page Used to Manage Activities when Project Costing is Installed

Page Name	*Definition Name*	*Navigation*	*Usage*
Project Activities	SPA_PROJ_ACT	Services Procurement, Define Services Procurement, General Setup, Project /Activity Definitions, Project Activities	Modify project activities. **Note.** The Project Activities page (SPA_PROJ_ACT) is used for activities when Project Costing is installed. The Service Activities page (SBP_SETID_ACTIVITIES) is used to maintain Service Activities when Project Costing is not installed

Modifying Project Activities

Access the Project Activities page (Services Procurement, Define Services Procurement, General Setup, Project /Activity Definitions, Project Activities).

Modify the Description, Status, and Visibility fields as required.

Note. You can't modify the Business Unit, Project ID, or Activity ID fields for an existing activity. If the activity is no longer valid, you can change the status to *Inactive*.

Chapter 14

Creating and Managing Services Procurement Requisitions

This chapter provides an overview of requisitions, lists common elements, and discusses how to:

- Create requisition lines for resource-based services.
- Create requisition lines for deliverable-based services.
- Create requisition lines for multi-resource services.
- Review, edit, and submit requisitions.
- Manage service requisitions.
- Approve requisitions.
- Track requisition changes.

Understanding Requisitions

This section lists prerequisites and discusses:

- Requisitions
- Multicurrency requisitions

Prerequisites

Before you enter requisitions into the system, you must:

- Have authorization to process requisitions on the Requisition Authorizations of the Procurement User Preferences page.
- Identify the user ID as a requester on the Requester Setup page, where you add defaults for requisitions.
- Have a role action of SP_REQUESTER.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Service Requester Defaults, page 141

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Roles for Role Actions, page 137

Requisitions

Requesters can use PeopleSoft Services Procurement to create and maintain service requisitions. After you enter and submit a requisition, send it to the approver for approval. Approved requisitions are then sourced to qualified suppliers that meet the requisition requirements. Use tools such as bid factors and supplier scores to rate the best candidates.

On the same requisition, you can add lines for service items using PeopleSoft Services Procurement and commodity items using PeopleSoft eProcurement.

Requisition Lines

A service requisition is made up of multiple lines. These lines can be either a mixture of resource and deliverable services or a single multi-resource service. Requesters can use PeopleSoft Services Procurement to create, edit, cancel, or extend requisition lines. Use PeopleSoft Purchasing to close services requisitions. Lines associated to a resource service method may be created for multiple positions.

See *PeopleSoft Purchasing 9.1 PeopleBook*, "Creating Requisitions Online."

Resource-Based Requisition Lines

Requisition lines for resource-based services enable you to request the services of an individual service provider. Upon awarding the requisition line to the supplier, the service coordinator or requester generates a services work order and memorializes the attributes as terms and conditions. Upon the work order release, the service provider may create timesheets to record hours worked.

Timesheet information subsequently triggers self billed invoicing functionality for payment to the supplier.

A resource based requisition line may have multiple positions, issue a single sourcing notification to suppliers, and create work orders for each position. The Service Coordinator can fill the requisition line with multiple bids, up the total position quantity. Position information appears on the requisition, approval, sourcing, and bid pages so the requester, service coordinator, and service provider contact can track how many positions are filled or available, as well as obtain average fill rates and amounts for the requisition line.

You can reduce the number of positions on a requisition line that is not already filled. The requester can perform this action as long as the line is not sourced. After sourcing, only the service coordinator can perform this action.

Note. You cannot reduce the number of positions under the number of positions that are already filled. If the number of positions is reduced to equal the number of positions that are already filled, the requisition line status is changed to *Filled* and an email notification is sent to all sourced suppliers having a notification method of *email and worklist.*

Deliverable-Based Requisition Lines

Deliverables-based requisition lines reflect requirements generally performed by an entire work force, such as a requisition for an entire project, not just the hours worked by a single service provider. There is no specific service provider in mind for the deliverables-based requisitions, so a statement of work defines the requirements.

Note. Although no specific service provider is assigned initially, it is possible to track individuals on the related work order for security purposes.

You can define a deliverables-based requisition with its unique attributes. These attributes carry over into the sourcing event to analyze and score supplier submittals in accord with the requisition requirements. Upon awarding the requisition line to the supplier, the service coordinator or requester generates a services work order and memorializes these attributes as terms and conditions. Upon the work order release, the service provider contact records progress against a progress log, and you pay the supplier based on milestones, percentages, a fixed amount, or rates.

For example, suppose that you have a percentage-based requisition, and the service provider contact reports the percentage complete against a progress log and you pay the supplier for that percentage of work. Or, you could list project milestones and pay the service provider an agreed upon amount when each milestone is completed.

The progress log becomes the basis of the self-billed invoicing functionality for payment to the supplier.

Multi-Resource Requisition Lines

Multi-resource requisition lines support multiple unique services and service providers for PeopleSoft Services Procurement requisitions. Multi-resource services are services provided for an overall agreed upon amount. The overall agreed upon amount for a service or set of services is independent of the number of service providers associated to the service.

When you select the Multi-Resource service method, the system displays a page that is similar to deliverables-based requisitions, where you can define the multi-resource service top line overall amount for labor and expense. Multi-resource services supports multiple unique services and service providers for requisitions, sourcing, and work orders. Multi-resource services enable you to manage complex services at a granular level.

Each requisition is limited to only one multi-resource requisition service, and when a multi-resource service is selected, then no other service lines are allowed on the requisition. The system bases default values for multi-resource services on the multi-resource service type and service, and it populates the requisition fields with the default values. Any related individual services that were defined as default values for the specified multi-resource service will be used as default values. You can use the Add Service button to add more related individual services. The system does not enable multi-resource services on the resource-based, deliverables-based, or goods requisition.

Deliverables-based and multi-resource services have the same bid factor mapping. Default values also exist for multi-resource service attributes, including the skills matrix. The system performs vendor-managed services and managed-services provider calculations, expense calculations, and rate access logic for the multi-resource service.

Fiscal approval for multi-resource services is based on the top-line, overall not to exceed amounts and not on the individual service level. Requisition line-level information includes service method, service type, service, requesting department, location, request type, scope of work, duration information, labor and expense amounts, accounting distribution information, vendor information, and service coordinator information.

You can add multiple unique individual services under a multi-resource requisition line. For each individual service related to a multi-resource requisition line, you can include service type, service, labor rate and unit of measure, title, start date, end date, expense rate and unit of measure, quantity, location, utilization, competencies, education level, experience, telecommute, travel required, travel frequency, scoring criteria, and whether an interview is required.

For more information about preparing the PeopleSoft Services Procurement system for use with multi-resource services, see the "Setting Up Application Specific Options for PeopleSoft Services Procurement" chapter.

Requisition Line Cancellation

Requesters can cancel individual or multiple requisition lines. When a requester cancels a requisition, the system automatically sends cancellation notifications to all affected parties, including all sourced suppliers.

Depending on the business unit settings, reason codes may be required when canceling a line.

Note. If all requisition lines are canceled, the requisition header status is automatically set to Canceled. Affected budget distribution amounts are immediately adjusted to reflect canceled amounts.

Note. If a work order is already created for a requisition line, the line cannot be canceled.

Services Requisition Closure

Use PeopleSoft Purchasing to close Services Procurement requisitions.

See *PeopleSoft Purchasing 9.1 PeopleBook*, "Closing Requisitions."

Supplier Rate Breakdown and Resource Requisitions

When you create a service requisition, depending on the business unit settings, the requester may or may not have the authority to enter a bill rate, which is the rate paid to the supplier. If they do have the authority to enter a rate, the installation options setting for Pay Types Enabled and the role actions of the requester will determine whether they enter only a total rate or the individual components of that rate. When pay types are enabled, the suppliers enter as many as four types of pay rates when they bid on the requisition line: the service provider pay rate, any additional incurred costs, and standard and third-party markup rates, if applicable. The sum of these rates is the bid rate. This functionality enables service coordinators to track the rate breakdown and set limits on the supplier markup rates.

After you fill a service requisition with the negotiated bill rate, the system generates a work order that shows the rate breakdown. You cannot edit the rates if the work order is linked to a requisition, although you can enter new effective-dated rates after the work order is released.

Rate Sheet Breakdown for Rates and Expenses

You can define default rates and expenses for contingent labor on the rate sheet. The rate breakdown structure on the rate sheet includes pay rate, supplier markup, third-party markup, fixed costs, and expenses. The rate breakdown that you define prepopulates requisitions and work orders based on the related region and service type. You can define minimum, maximum, and target levels on the rate sheet for each of the rate elements, including expenses. Tolerance checking on the requisition validates pay rate, total rate, and expenses at the beginning to help companies ensure compliance with negotiated or standardized rates. In this way, services costs are closely monitored.

If a requester has access to view the rate breakdown information on the requisition, all rates will be visible to that requester. The requester may also have the ability to edit the requisition rate, depending on the business unit settings. However, if the requester has a role action to hide the rate breakdown information, he will not be able to view rate breakdown information.

In addition to configuring the system to show or hide rates for a requester, you can also configure the system to enable service coordinators to define the rate information for a requisition line or manual work order before it is submitted for approval.

Post Approval Edits to Requisitions

If a requisition line is not yet sourced, you can change it. All fields are available for edit. Changes can trigger another approval, depending on how the change tracking setup is defined. If so, the system sets the requisition status back to Pending. The service coordinator or team cannot source the requisition until it is successfully approved again unless the business unit allows pre-approval sourcing. In that situation, you can source the requisition as soon as it is submitted for approval. The sourcing worklist entries remain in the worklist throughout each approval process and are replaced by new worklist entries upon approval. If the requisition is denied, then the original worklist entries remain until the requisition is either resubmitted and approved or canceled.

See Chapter 14, "Creating and Managing Services Procurement Requisitions," Tracking Requisition Changes, page 330.

Requisition Extensions

Requesters can extend completed service requisition lines. If you need to extend a requisition, you must go to the latest extension of the requisition to extend it further. When you extend from the requisition, the system creates a new Requisition ID and line by transferring the requester to the Create Services requisition page.

The system populates values from the original requisition to the new requisition line as a default. The start date of the new requisition is equal to the end date of original requisition plus one day. The status of the new requisition is pending approval. Once the requisition is approved, you can source the extended requisition to the supplier for confirmation of availability and rates.

The new requisition references the Requisition ID and line number of the original requisition line. The system also marks the original requisition as extended. You can edit the reference, request type, department, time approver, end date, rate, and service coordinator/team of the new requisition. The remaining fields are not editable.

Note. Currency conversion calculations are based on the date that the requisition was extended.

Note. If you extend a requisition, you cannot extend the associated work order directly. You must perform subsequent extensions from the extended requisition. Likewise, if the work order related to a requisition line has already been extended, then you cannot extend it further from the requisition.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up User Preferences, page 141

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Creating Bid Factors, page 121

"PeopleSoft Services Procurement Preface," page xxiii

Chapter 25, "Supplier Scoring for PeopleSoft Services Procurement," page 643

Multicurrency Requisitions

If the purchasing business unit has multicurrency enabled for requisitions, the requester can change the currency on the service requisition. Rate sheet validation can occur in either the requisition currency or the base currency. After the requisition is approved and sourced, suppliers enter bids in the requisition currency, but they can see amounts in their location currency, which can be different than the requisition currency.

With multicurrency, you can:

- Support global customers by enabling services procurement transaction processes to occur in multiple currencies.
- Enable rate sheet validation to occur in the requisition base currency or the transaction currency.
- Enable users to create expense sheets in a currency different from the requisition currency.
- Create invoices in the vendor location currency, even if it is different from the requisition currency.

If multicurrency requisitions are enabled, the requester's currency appears by default. The requester can change this currency until the requisition is submitted for approval. Each requisition line that you add for the same requisition header must use the same currency.

If multicurrency requisitions are disabled, the purchasing business unit currency is used and cannot be changed.

The system calculates the base currency equivalent for the requisition line. The currency conversion exchange rate is based on the rate type that you define for the selected business unit. The rate type and rate date for currency conversion is stored. The rate type that is defined in the PeopleSoft Purchasing business unit definition is the default rate type. The effective rate date is the date when the requisition will be submitted for approval.

Common Elements Used in This Chapter

Average Filled Amount	The average of the individual estimated total amounts for which each position was filled.
Average Filled Rate	The average of the individual rates agreed to for each person filling a position for the requisition line.

Line Total	The total estimated cost for all positions on the line (position cost × total positions). **Note.** Any additional costs, such as shift pay or assignment pay, are not included in the calculation of the line total.
Number of Filled Positions	The number of people already selected to fill positions for the service. This field increments each time a position is filled through bid management and decrements each time a related work order is canceled.
Position	Individual instance of a resource-based service. The number of positions for a service line determines the number of service providers who will fill the requisition line.
Position Cost	The estimated cost for one individual to perform the specified service for the duration indicated. This cost includes both the service rate and expense rate for the duration.
Total Positions	The number of people needed for the service defined on a requisition line.
Total Filled Amount	The sum of all filled amounts for each position filled.

Creating Requisition Lines for Resource-Based Services

This section provides an overview of creating a services resource requisition line and discusses how to:

- Enter service requisition information.
- Enter scoring criteria.
- Add default multi-resource services.
- Suggest vendors.

Understanding How to Create a Services Resource Requisition Line

Complete these steps to complete the service requisition process:

1. Access the Create Requisition page and add a requisition name.
2. Access the Create Requisition - Services page.

   The service type, service, time approver, and service coordinator appear by default from the service requester defaults. The location appears by default from the requester setup ship-to location.
3. Enter the service.

   The system provides the job title, scope of work, competencies, education level, experience, telecommute, and travel required values by default based on attributes associated with the service.

4. Because this is a resource-based requisition line, you must enter a rate and unit of measure for the service.
5. If expenses are allowed for the requisition line, then enter the expense rate and unit of measure or just the expense amount.
6. Click the Scoring Criteria link on the Create Requisition - Services page to access the Bid Factors by Requisition Line page.

   Use this page to adjust the weightings of each bid factor to determine its level of importance.
7. Service coordinator and time approver values appear by default from requester defaults.
8. After all data is defined, click the Go to Submit Requisition button at the bottom of the page to access the Requisition Checkout page.

   Use this page to update the requisition name or to add comments.
9. Expand the requisition line to view or edit accounting lines.

   Use this page to enter distribution information for the requisition.
10. Click the Save and Preview Workflow button to save the requisition and to preview the approval routings. Alternatively, click the Save and Submit button to save the requisition and submit it for approval.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," page 79

"PeopleSoft Services Procurement Preface," page xxiii

Pages Used to Create Requisition Lines for Resource-Based Services

Page Name	*Definition Name*	*Navigation*	*Usage*
Create Requisition	PV_REQ_HDR	Services Procurement, Create Requisition	Enter basic service requisition information.
Create Requisition - Services	SPF_REQ_INFO_PG	Select Continue on the Create Requisition page.	Enter service requisition line information.
Location Address	SPF_ADDRESS_LOC	Click the Location link on the Create Requisition - Services page.	View the location address.
Currency Information	EXCH_RT_DTL_INQ	Click the Currency Exchange Information link on the Create Requisition - Services page.	View the currency information and exchange rate.
Bid Factors by Requisition Line	SPF_BDFTR_REQ_PG	Click the Scoring Criteria link on the Create Requisition - Services page.	Adjust the weightings of each bid factor to determine its level of importance.

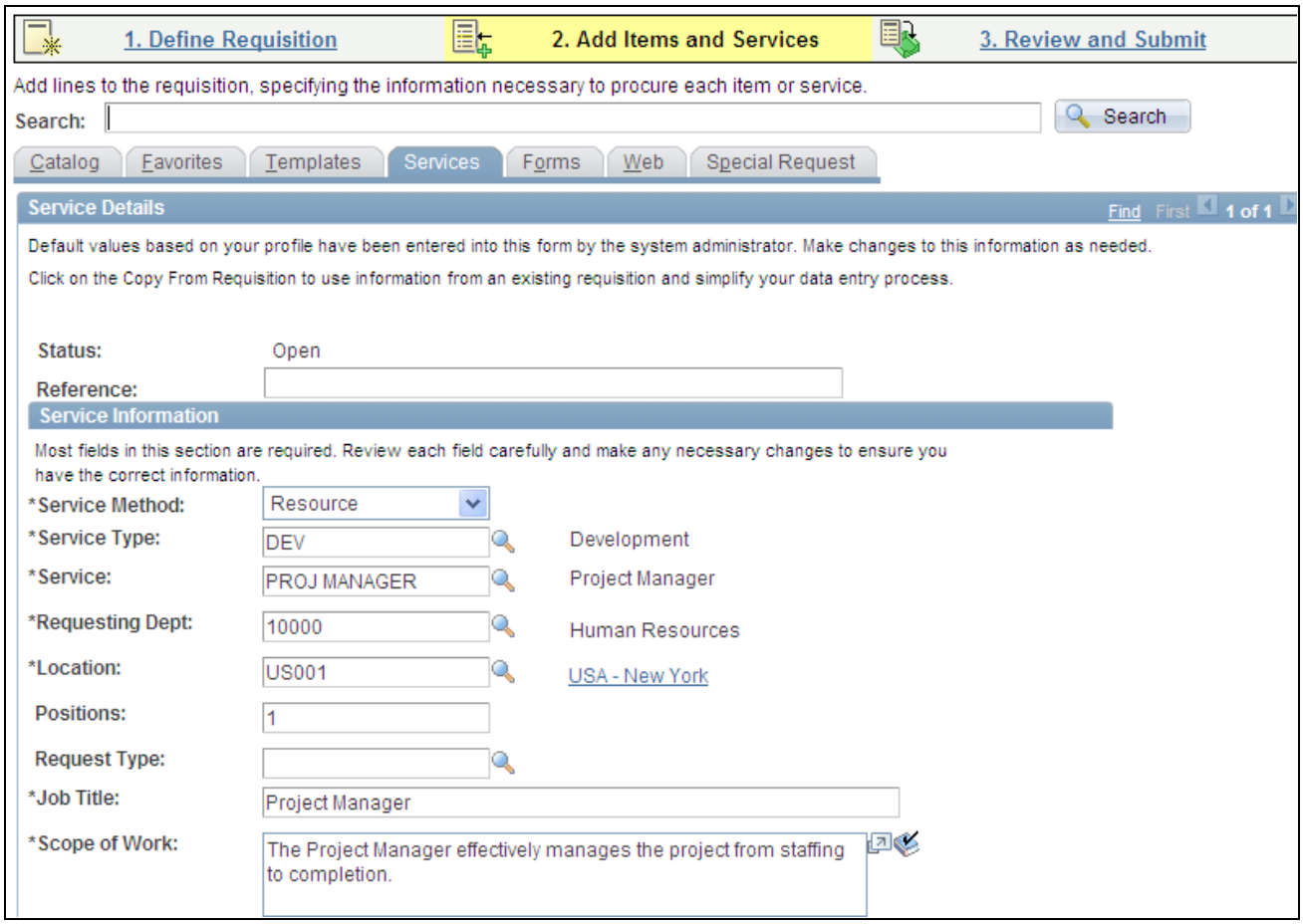
Page Name	*Definition Name*	*Navigation*	*Usage*
Bid Factor List Items	SPF_BDFTR_LST	Click the Bid Factors List Items button on the Bid Factors by Requisition Line page.	Enter bid factors where the bidder selects from a list.
Suggest a Vendor	SPF_SUG_VENDOR	Click the Suggest Vendor link on the Create Requisition - Services page.	Enter vendor information for a new vendor that is not in the system yet.
Requisition Checkout	PV_REQ_FORM	Click the Go to Submit Requisition button on the Create Requisition - Services page.	Save the requisition and submit for approval.
Line Comments	PV_REQ_COMMENTS	Click the Comments button on the Requisition Checkout page.	Enter line comments.

See Also

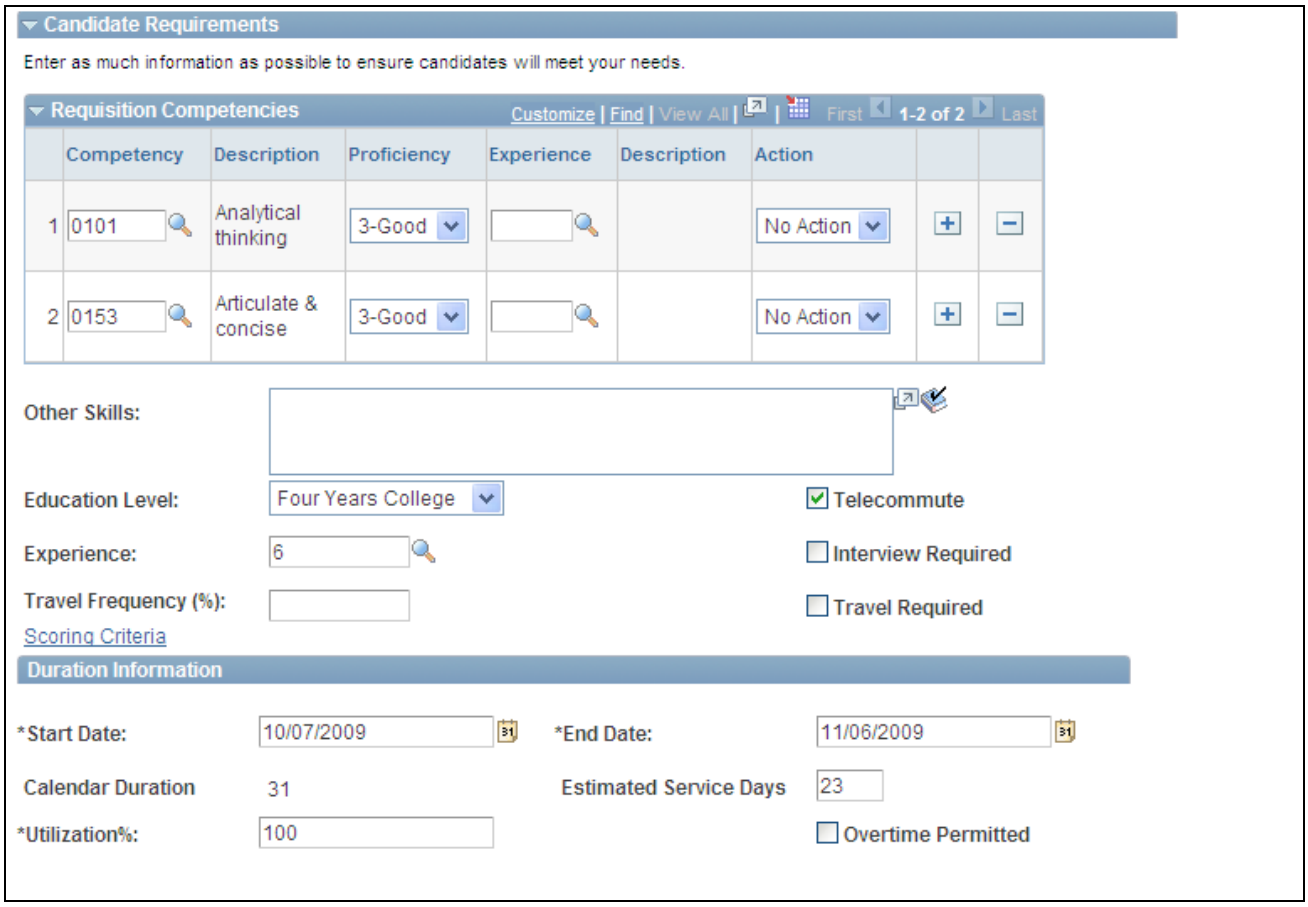
PeopleSoft eProcurement 9.1 PeopleBook, "Managing Requisitions in PeopleSoft eProcurement"

Entering Service Requisition Information

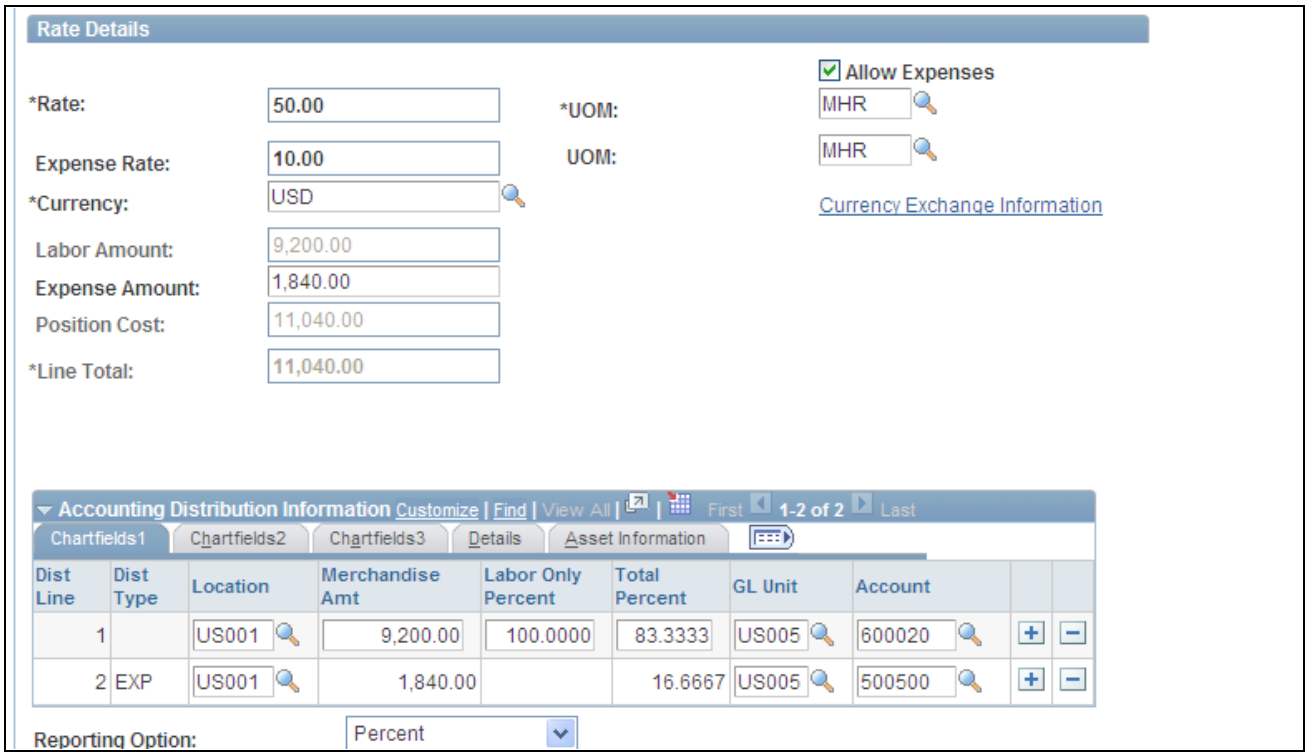
Access the Create Requisition page (Services Procurement, Create Requisition).



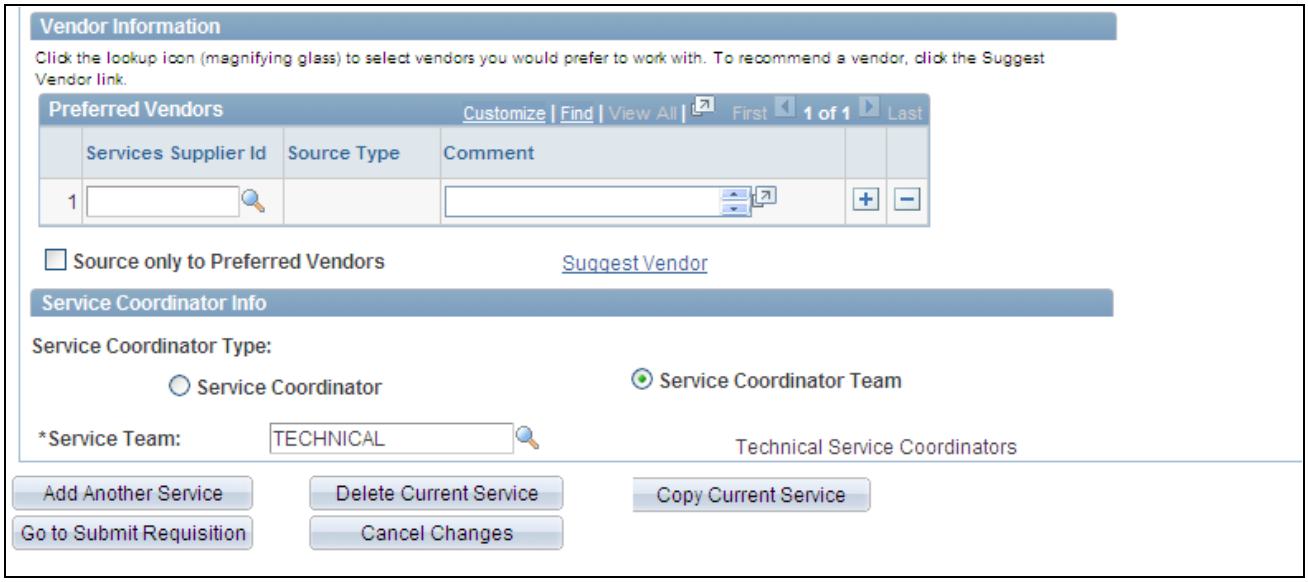
Create Requisition page (1 of 4)



Create Requisition page (2 of 4)



Create Requisition page (3 of 4)



Create Requisition page (4 of 4)

Note. If you defined the service attributes, the system populates many of the fields in the Service Details section of the Create Requisition page automatically. If you defined a rate sheet for the service region currency combination, the system automatically populates the rate with the default rate that you defined on the rate sheet.

If you defined defaults on the Requester User Defaults page, many of the fields on the requisition appear by default from that page.

Note. If the HCM integration option is selected on the Services Procurement installation options page, you will see the HCM Fields section on the Create Requisition page.

See Appendix C, "PeopleSoft Human Capital Management Integration," page 671.

Service Information

Service Method

Select the service method for this requisition. If you defined a default service method using the Requester Defaults page, that method appears as a default value when you initially access this page. Available values include:

Deliverable: Select to request services that are generally performed by an entire work force, such as a requisition for an entire project, not just the hours worked by a single service provider.

Multi Resource: Select to request services that support multiple unique services and service providers. When you select this value and enter a service type, the system displays the Multi Services Information grid box when you enter a service type.

Resource: Select to request the services of an individual service provider.

Service Type

Select the service type for this requisition, for example, information technology, professional, or hardware engineering. Initially, this value appears by default from the service requester defaults, if they are defined. Available service types depend on the service method that you select.

Service

Select the specific service or role that is to be performed, for example, Java developer. You can only select services linked to the service type specified. Initially, this value appears by default from the service requester defaults, if they are defined. For example, if you select *Resource* in the Service Method field, the system provides only services types that are defined as resource service types. The system also filters the content of the Service field based on the service method.

Requesting Dept (requesting department)

Select the requesting department.

Note. When PeopleSoft Human Capital Management integration is enabled, the values are based on the HCM departments.

Location

Select the location where the job is to be performed. Initially, this value appears by default from the requester defaults.

Note. The region for rate sheet selection is automatically derived based on the location specified.

Job Title

Enter the internal classification of the position. This value appears by default from the service attributes, if it is defined.

Request Type

Select an appropriate request type. Values are defined by the Service Administrator.

Note. This field is not required.

Positions

Enter the number of service providers who will fill the requisition line.

Note. You can specify up to 999 positions for a requisition line.

Scope of Work

Enter the scope of the engagement in this free-form field. This value appears by default from the comments field on the service attributes.

Candidate Requirements

Requesters can use this section to enter desired candidate competencies that relate to the service requisition. When candidate skills are deemed insufficient, a configurable rule is initiated to block, warn, or take no action.

Once candidate competencies are defined, service coordinators can view the competencies before sourcing the request to suppliers. This enables the service coordinator to source requisitions to the most appropriate suppliers.

Competency

Select a competency to quantify and compare skills. Default values are provided from the service attributes.

Proficiency

Select a proficiency for the competency. The rating model associated to the competency determines the available values.

Experience

Select the years of experience required for the competency.

Action

Link an action to a specific competency. Values include *Block,No Action,* and *Warn.*

Block: The provider contact is not allowed to submit a candidate if a candidate does not possess the required skill.

No Action: No action is taken if a candidate does not possess the required skill.

Warn: A warning message appears to the provider contact and the service coordinator if the candidate does not possess a required skill.

Note. The action will designate the appropriate message when a requisition competency does not match a provider's competency.

Other Skills

Enter a brief description of any additional skills that a candidate should possess to fill the position.

Education Level

Select the education level that a candidate must possess to fill the position. This value appears by default from the competencies defined in the service attributes.

Experience Enter the number of years of experience that a candidate must possess for the service. This value appears by default from the competencies defined in the service attributes.

Telecommute Select when the job allows candidates to work from home.

Travel Required Select when the job requires a candidate to travel.

Travel Frequency If travel is required, enter the percentage of time required for travel.

Interview Required Select this check box if a candidate interview is required. This option appears by default from the service attributes. When you select this option, you must record interview information prior to offering the position.

Scoring Criteria Click to access the Bid Factors by Requisition Line page, where you can adjust the weightings of each bid factor to determine its level of importance.

Note. Bid factor elements are used to evaluate candidate submittals to determine which candidate is the best match for the requisition. The total of the bid factor weightings must add up to 100 before you can leave the page. If you do not visit this page, the system evenly weights each of the bid factors to reach a total of 100. The service coordinator can update the bid factor weightings at sourcing time.

Duration Information

Start Date and **End Date** Enter the dates on which the job begins and ends.

Calendar Duration Displays the number of days between the start and end dates.

Estimated Service Days A value appears by default after you enter the start and end dates. This value is used for calculating the quantity based on units of measure. The unit of measure that signifies a day is defined in the installation parameters.

Utilization % (utilization percent) Enter the percentage of time that the candidate will spend during the engagement. For example, if the candidate typically works a half-day, then utilization is 50 percent. If the candidate typically works 3 days per week, then utilization is 60 percent.

Overtime Permitted Select this check box if overtime is permitted for this requisition.

Note. This check box is for informational purposes only. Any premiums paid for overtime will depend on the predefined time reporting rules.

Rate Details

Rate

Enter the rate of pay that is associated with the service requisition. Modifications to the rate amount are validated against rate sheets that you define for the service and region. The tolerance amount for the rate sheet is verified by using base currency values that are stored at the requisition level. The currency values are not validated if rate sheets are not defined for the project role and region. If you enter a rate amount that is out of tolerance with the rate sheet, then you receive either an error or a warning message.

If you select SP Pay Types Enabledon the Services Procurement Installation Options page and the requester does not have the *Hide Rate Breakdown* role action, then rates are defined separately for each component of the rate breakdown.

Allow Expenses

Select to allow the entry of expenses on requisitions and work orders. The Allow Expenses setting is derived from the BSetup and Service Type Setup pages. When you select to allow expenses, you must enter an expense rate and amount. The system provides an error message if the Allow Expenses check box is selected but an expense-related rate and amount were not entered.

Note. This check box is only available if SP Expenses Enabled is selected on the Services Procurement Installation Options page.

Although this setting appears by default from the Services Procurement Business Unit page, you can override it here.

UOM (unit of measure)

Select the unit of measure associated with the labor rate entered.

Expense Rate

Enter the expense rate that is associated with the service requisition. The system uses the duration to calculate an expense amount using the expense rate and unit of measure. You must enter a rate if the Allow Expenses check box is selected.

Note. If you enter a value in the Expense Amount field, the expense rate is refreshed based on the amount entered.

This field is not available when the Allow Expenses check box is deselected.

UOM (unit of measure)

Select the unit of measure associated to the expense rate entered.

Labor Amount

Displays the total labor amount calculation, which is based the rate, unit of measure, and service days specified.

Expense Amount

Enter the total expense amount for the requisition. The system calculates the value using the expense rate and unit of measure, but you can override the value.

Note. This field is not available when the Allow Expenses check box is not selected.

Currency

Enter the currency that is associated with the rate.

Note. You can change the currency only on the first requisition line and only if multicurrency requisitions are allowed. The value from that line appears by default in all subsequent requisition lines.

All new currency field values and the base and transaction currency values that you create in a PeopleSoft Services Procurement requisition are passed to the requisition records that are created in the PeopleSoft eProcurement tables.

Position Cost

Displays the estimated cost for one individual to perform the specified service for the duration indicated. This cost includes both the service rate and expense rate for the duration.

Note. This field is available when the Override Position Cost check box is selected.

Line Total

Displays the total for labor and expense for all positions for the duration of the requisition.

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Rate Sheets, page 95.

Time Reporting Information

Reporting Option

Select an available time reporting option. Values include:

Actuals: Select to indicate that the service provider will report actual time against each ChartField distribution line defined on the work order. This option applies to resource-based requisitions and work orders only.

Default from BU: Select to indicate that the default reporting option defined for the business unit is used for the requisition.

Percent: Select to indicate that the service provider or service provider contact will report total time or progress against the work order, and the distribution percentage is used to automatically allocate time or progress across the predefined ChartFields for accounting.

See Chapter 19, "Managing Time in PeopleSoft Services Procurement," page 477.

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Settlement Setup, page 170.

Accounting Distribution Information

Use this section to charge funds to the appropriate department or project.

Note. If you create a requisition with multiple positions, all positions share the same ChartField distribution fields.

Amount

Enter the amount that is to be charged to a particular ChartField combination.

Note. Changes to the labor percentage or total percentage trigger an automatic recalculation of the distribution line amount.

Labor Only Percent

Enter the labor percent allocation for the requisition line that is charged to a ChartField combination.

Note. Changes to the total percentage or amount trigger an automatic recalculation of the labor percentage for the distribution line.

Total Percent

Enter the percent allocation of the total amount for the requisition line that is charged to a ChartField combination.

For example, if you have one distribution and you enter 100 for that distribution line, the system charges 100 percent of the requisition request to the same department or project. However, if you have two distribution lines and you enter 50 percent for the first distribution line and 50 percent for the second distribution line, the system evenly distributes the requisition line amount between both distributions.

Note. Changes to the labor percentage or amount trigger an automatic recalculation of the total percentage for the distribution line.

Account

Enter the account that is to be charged to a particular ChartField combination.

Budget Status

Displays whether the distribution has been budget checked when commitment control is selected. Values for this field include *Not Chekd* and *Valid.*

Budget Date

Displays the date used by commitment control to determine the budget period to which this item cost belongs.

Pre-Encumbrance Balance

Displays the pre-encumbrance balance. Pre-encumbrance is created in your budget records by the budget checking process when you generate a requisition.

Pre-Encumbrance Balance will appear only when commitment control is selected and if budget checking has been run at least once for the requisition.

See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Defining and Using ChartFields."

Vendor Information

The preferred vendors grid is hidden for users having a role defined for the *SP_HIDE_SOURCING_PG* role action.

Services Supplier ID

Select the preferred service supplier to whom you want to source the requisition, if known. This is an instruction for the service coordinator, it will not be enforced by the system.

Source Type

Displays the source type. Values are *Primary*, *Secondary*, and *Tertiary*.

Source only to Preferred Vendors

Select to indicate that the service coordinator should source this requisition only to the suppliers defined on the requisition.

Note. This check box is only available if the requester is authorized to source to preferred vendors on the service requester defaults.

Suggest Vendor

Click to access the Suggest Vendor page, where you can suggest a vendor who does not yet exist in the system.

Service Coordinator Information

Service Coordinator

Select this button to specify the service coordinator who will source this requisition line to service suppliers.

Coordinator

Enter the name of the person who is responsible for filling the requisition line. Initially, this value appears by default from the service requester defaults, if they exist.

Note. This field is only available when you select the Service Coordinator option.

Note. The service coordinator must have one of the roles defined in the *SP_SRVC_COORDINATOR* role action.

Service Coordinator Team

Select this button to specify a service team that will source this requisition line to service suppliers.

Note. When creating a requisition, the default service coordinator or team is assigned in this order: first, the system checks for a default team on the service requester; next, it checks for a team by region and service type; last, the system checks in the business unit.

Service Team

Enter the service team that is responsible for filling the requisition request.

Note. This field is only available when you select the Service Coordinator Team option.

HCM Fields

This section displays the PeopleSoft Human Capital Management field names that you use when PeopleSoft Services Procurement is set up to integrate with Human Capital Management.

Regulatory Region Select a regulatory region. The regulatory region functionality is for use in performing regulatory and regional edits. You use the regulatory region for PeopleCode edits, set processing, and to control what codes and values are available to users. PeopleSoft Human Capital Management is delivered with defined regulatory regions that correspond to regions within countries, such as states or provinces, that impact the way your company does business.

Company Select a company.

Business Unit HR Select the human resource business unit.

Job Location Select a location code that indicates where the job is.

HCM Job Code Select a job code. In HCM, jobs are identified by job codes. You use job codes to maintain information about jobs independent of the person or group performing that job. For example, salary grades and standard hours are assigned to a job regardless of who holds that job.

Establishment ID Select an establishment defined in PeopleSoft Human Capital Management. Establishments define distinct physical places of business within a company. This option is only visible when the regulatory region is USA or France.

HCM Administrator (PeopleSoft Human Capital Management administrator) Select the administrator who oversees the PeopleSoft Human Capital Management applications that integrate with PeopleSoft Services Procurement.

Other Page Elements

Add Another Service Click to add another service requisition line.

Copy Current Service Click to copy the current service requisition line. For multi-resource service types, the system copies all the associated multiple unique services along with the main top-line service.

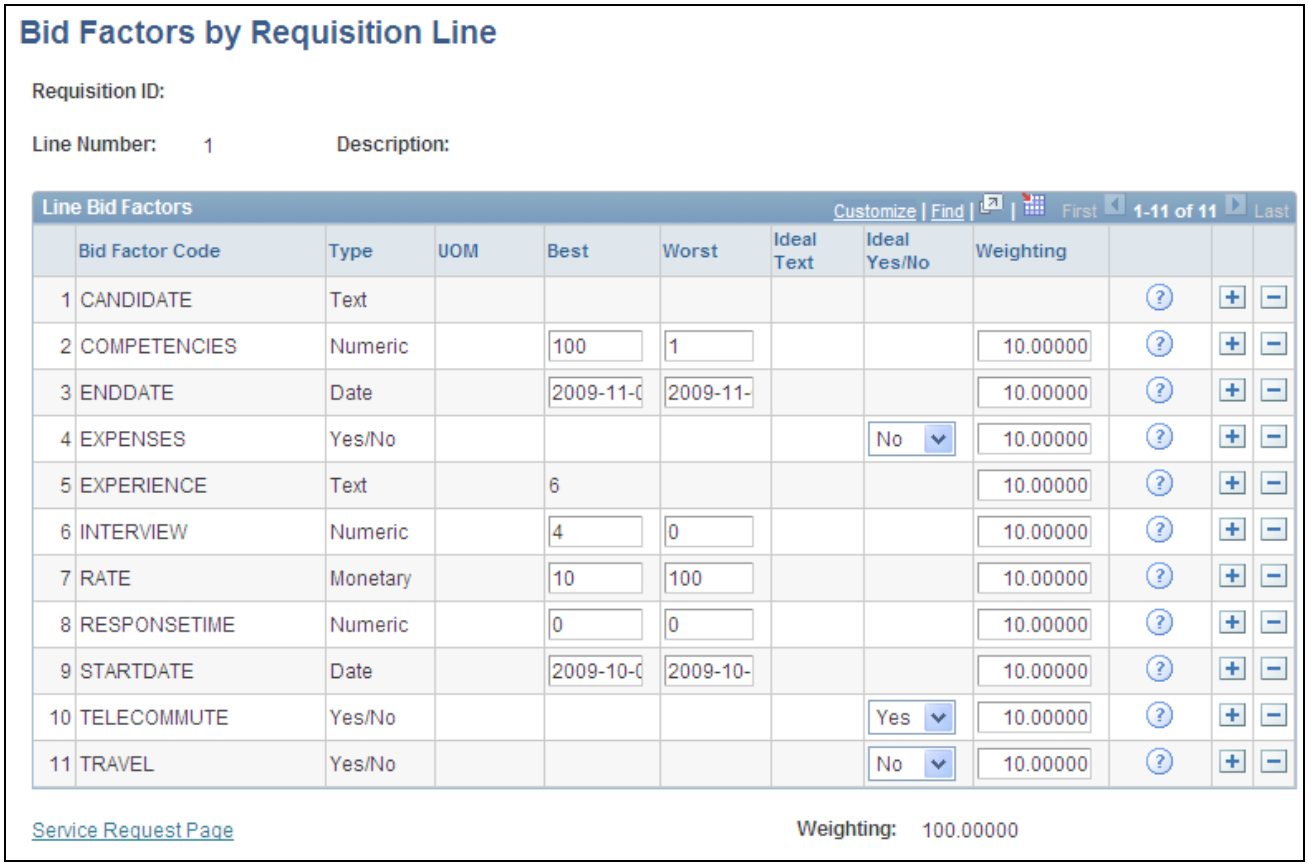
Delete Current Service Click to delete current service requisition line. For multi-resource service types, the system deletes all the associated multiple unique services along with the main top-line service.

Go to Submit Requisition Click to access the Requisition Checkout page, where you can submit the requisition for approval.

Cancel Changes Click to cancel the current requisition line.

Entering Scoring Criteria

Access the Bid Factors by Requisition Line page (click the Scoring Criteria link on the Create Requisition - Services page).



Bid Factors by Requisition Line

Requisition ID:

Line Number: 1 Description:

Line Bid Factors — Customize | Find | First 1-11 of 11 Last

	Bid Factor Code	Type	UOM	Best	Worst	Ideal Text	Ideal Yes/No	Weighting
1	CANDIDATE	Text						
2	COMPETENCIES	Numeric		100	1			10.00000
3	ENDDATE	Date		2009-11-(	2009-11-			10.00000
4	EXPENSES	Yes/No					No	10.00000
5	EXPERIENCE	Text		6				10.00000
6	INTERVIEW	Numeric		4	0			10.00000
7	RATE	Monetary		10	100			10.00000
8	RESPONSETIME	Numeric		0	0			10.00000
9	STARTDATE	Date		2009-10-(	2009-10-			10.00000
10	TELECOMMUTE	Yes/No					Yes	10.00000
11	TRAVEL	Yes/No					No	10.00000

Service Request Page Weighting: 100.00000

Bid Factors by Requisition Line page

For a resource-based requisitions, the system automatically selects every bid factor with a resource service type bid factor selected on the Bid Factor Mapping page.

Bid Factor Code

Displays PeopleSoft Services Procurement bid factor codes that appear by default from the Bid Factors page.

Note. You can add improvised bid factors or modify existing bid factors while you create the requisition. Improvised bid factors are not predefined for PeopleSoft Services Procurement.

Best and **Worst**

Enter the best and worst possible responses that a candidate can provide in response to a particular question.

Ideal Yes/No

Select the ideal response that a candidate can provide for a particular question. Values are *Yes* and *No*.

Weighting Adjust the weightings of each bid factor to determine its level of importance. For example, if the candidate start date is the most important qualification, then you might weigh that bid factor more heavily than the others.

Note. The total of all bid factor weightings must equal 1.

Click the Question button to view the bid factor question that is associated with the bid factor code. For example, if a bid factor code is experience, then the bid factor question associated with the code might be: "How many relevant years of experience does the candidate have?"

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Creating Bid Factors, page 121

Suggesting Vendors

Access the Suggest a Vendor page (click the Suggest Vendor link on the Create Requisition - Services page).

Vendor Name Enter the name of the preferred vendor.

Contract Select to indicate that the supplier has signed the service agreement.

Notify by email Select to send an email notification to the administrator that includes the suggested vendor details. The administrator can elect to add the vendor to the enterprise network.

Creating Requisition Lines for Deliverables-Based Services

This section provides an overview of deliverables-based expense capture and discusses how to:

- Create deliverables-based requisition lines.
- Associate bid factors to deliverables-based requisitions.

Understanding Deliverables-Based Expense Capture

To support resource tracking for deliverables-based engagements, the Track Resource option is available in the service type definition. This option initiates the process of identifying the resources for the engagement.

Pages Used to Create Requisition Lines for Deliverables-Based Services

Page Name	*Definition Name*	*Navigation*	*Usage*
Create Requisition	SPF_REQ_INFO_PG	Services Procurement, Create Requisitions Select Continue to access the Create Requisition page.	Enter basic service requisition information.
Bid Factors by Requisition Line	SPF_BDFTR_REQ_PG	Click the Scoring Criteria link on the Services page.	Adjust the weightings of each bid factor to determine its level of importance.
Currency Information	EXCH_RT_DTL_INQ	Click the Currency Exchange Information link on the Services page.	View the currency information and exchange rate.
Suggest a Vendor	SPF_SUG_VENDOR	Click the Suggest Vendor link on the Services page.	Enter vendor information for a new vendor that is not yet in the system.

Creating Deliverables-Based Requisition Lines

Access the Create Requisition page (Services Procurement, Create Requisitions).

1. Verify the job title, scope of work, and other skills, which appear by default based on attributes associated with the service.
2. Enter a price for the entire deliverable rather than an hourly rate, because this is a deliverables-based requisition.
3. Verify the service coordinator and progress log approver, which appear by default from the service requester defaults.
4. Select whether you want to track resources for the deliverables-based requisitions.

   The system provides the settlement options as a default from the service.

See Also

Chapter 12, "Managing Services Projects," page 273

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Service Setup, page 80

Associating Bid Factors to Deliverables-Based Requisitions

Access the Bid Factors by Requisition Line page (click the Scoring Criteria link on the Services page).

For deliverables-based requisitions, the system provides bid factors by default from the Bid Factors by Service,Bid Factors By Activity, Bid Factors by Item Category, or Deliverable Service type check box on the Bid Factor Mapping page. The system eliminates duplicates.

Bid factors enable suppliers to indicate how much they charge for individual price components of the total project amount. You can include lines for each service that you are sourcing. The suppliers answer all the bid factor lines and questions associated with each bid factor code when bidding on the services requisition.

Bid factor weightings must equal 100. If you do not ensure that the bid factors equal 100, the system weighs each bid factor equally. When the service coordinator sources the requisition, he can update the bid factor weightings on the Manage Sourcing page.

See Also

Chapter 15, "Managing PeopleSoft Services Procurement Sourcing," page 339

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Bid Factors and Requisitions, page 117

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Creating Bid Factors, page 121

Creating Requisition Lines for Multi-Resource Services

This section discusses how to:

- Create multi-resource service requisitions.
- Add services to multi-resource requisition lines.
- Add default multi-resource services for requisitions.

Pages Used to Create Requisition Lines for Multi-Resource Services

Page Name	***Definition Name***	***Navigation***	***Usage***
Create Requisition	SPF_REQ_INFO_PG	Services Procurement, Create Requisition	Create multi-resource service requisitions.
Default Services	SP_DEF_MULTI_SERV	Click the Add Default Service button on the Create Requisition page. The link is located in the Multi Services Information grid, which appears when you create multi-resource requisitions.	Add default multi-resource services.

Page Name	*Definition Name*	*Navigation*	*Usage*
Cap Amount Information	SPF_REQ_SERV_PG	Click the Add Individual Services link on the Requisition page.	Add services to multi-resource requisition lines.

Creating Multi-Resource Service Requisitions

Access the Create Requisition page (Services Procurement, Create Requisition)

This page is similar to the both the resource-based and deliverables-based requisition pages described previously in this chapter. When you select to create a multi-resource service, the Multi Services Information grid and additional buttons become available.

Using this page, you can establish overall requisition line information for the multi-resource service. The amount specified here becomes the overall not to exceed total for the combined associated individual services. In addition, many values specified at the top level, such as location and dates, will default down to the associated individual services when they are created.

Adding Services to Multi-Resource Requisitions

Access the Individual Service Information page (click the New Services link on the Create Requisition page).

This page displays service information associated to the multi-resource service line. The page is similar to the Create Requisition page, except that it provides parent service information about the related multi-resource service requisition line.

As part of adding services to multi-resource lines, the system:

- Calculates the VMS rate based on the VMS supplier defined at the top level, when applicable.

  If the VMS rate is not available for the lower-level service, the system uses the top-level VMS rate.

- Verifies that the start and end dates of the service do not go beyond the start and end dates defined in the top line.
- Does not enable the Expense, Expense Rate, Expense UOM, and Expense Amount fields if the top line does not have an expense amount.

Add Another Service Click to open a new service details page, where you can define the details of another service.

Copy Current Service Click to copy the current service as a new service details page.

Delete Current Service Click to remove the current service from the multi-resource requisition line. The system prompts you to verify that you want to delete the service.

Previous Service Click to access the previous service associated to the multi-resource requisition line. Using the link, you can view or edit all the services associated with the multi-resource requisition line without returning to the Create Requisition page. This link is not available until after you click the Next Service link.

Next Service Click to access the next service associated with the multi-resource requisition line. Using the link, you can view or edit all the services associated with the multi-resource requisition line without returning to the Create Requisition page.

Continue Click to save the service data you entered. The system validates the data using the same criteria it uses for resource-based requisitions. It displays messages for data that is not valid. After validation, the system copies the data to the Multi Resource Information grid on the Create Requisition page.

Cancel Changes Click to roll back all the changes and to reload the original information from the service.

Adding Default Multi-Resource Services for Requisitions

Access the Default Service page (click the Add Default Service button on the Create Requisition page).

Use this page to view basic requisition information that has been defined for default services. The page header provides business unit and requisition information. After selecting the service that you want to include, click the OK button and the system loads the services into the Multi Resource Information grid on the Create Requisition page. Click the Cancel button to cancel adding a default service.

Select Click to include this service in the requisition line.

Service Type Displays the ID of a grouping of services. Only service types associated to the*Resource*Service Method are included.

Service Displays a specific service.

When you select a service for use with multi-resource services and multiple services are defined for the service, the system displays the Use Default Service button so that you can select individual services from the service or select to include all services on the requisition.

Positions Displays the number of positions for this service. The default value is 1, but you can override this value.

Select/Deselect All Click to select all services that appear on this page. The default value for the check box is deselected.

Individual Services Information

Use this grid to view and maintain individual service information. The grid is available when you select to use a multi-resource service method and then select a service type. The grid initially appears empty. You populate the grid by adding default services with the button or selecting to add individual services one by one. . You can select from the list of services within a service type.

When you add default services, the services provided by the system are based on the setup of services and service type for multi-resource services.

Service Type	Displays the service type after you add or select a service for this requisition.
Service	Displays the service after you add or select a service.
Job Title	Click to access the service details where you can update service information.
Positions	Displays the number of positions that you want to include in this requisition. You can change this information by clicking the service link.
Location	Displays the business unit location used for this service.
Start Date and**End Date**	Displays the start and end dates for the service. These dates must be within the date range of the related multi-resource service.
Duration	Displays the length of time for this service. The value is in days. The system calculates the default value for this field by calculation work days within the date range, based on a 5 day work week. You can edit the number of days to indicate a longer or shorter work week as long as the days do not exceed the total number of days within the range.
Rate	Displays the rate at which this service is paid.
UOM (unit of measure)	Displays the unit of measure in which the rate appears.
Add New Service	Click to add a service. The system displays resources-based service information, and you can update the page with the new service information. See Cross Ref to new section

Reviewing, Editing, and Submitting Requisitions

This section discusses how to:

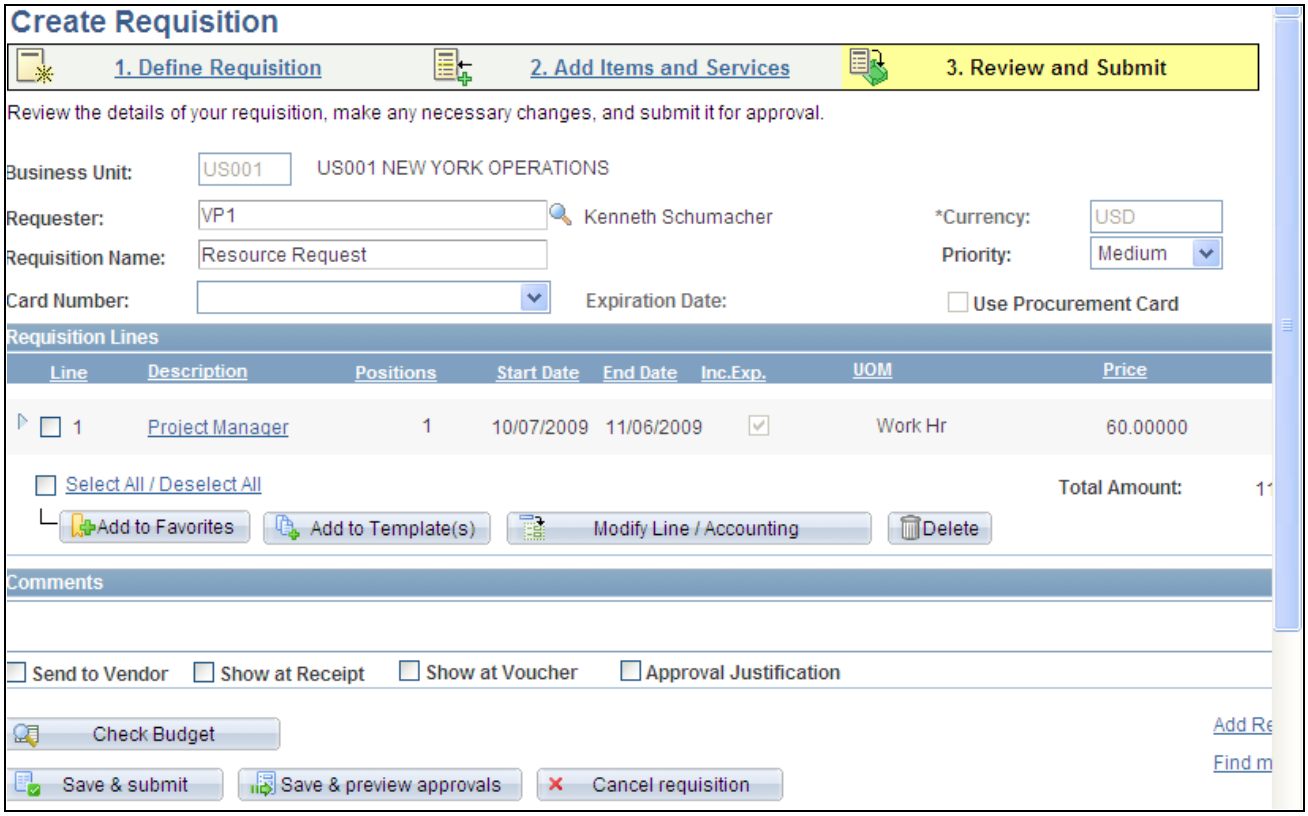
- Review and submit requisitions.
- Edit requisitions.

Pages Used to Review and Submit Requisitions

Page Name	*Definition Name*	*Navigation*	*Usage*
Review and Submit	PV_REQ_FORM	Services Procurement, Manage Requisitions,	Review and submit your requisition request.
Confirmation	PV_REQ_WF_PREVIEW	Click the Save & submit or the Save & preview approvals button on the Edit Requisition page or Create Requisition (Review and Submit) page.	View requisition details before submitting the requisition. You can also select to submit or edit the requisition or check the budget using the confirmation page.

Reviewing and Submitting Requisitions

Access the Review and Submit page (click the Go To Submit Requisition button on the Create Requisition page).



Review and Submit Requisition page

For multi-resource requisition lines, this page displays only the top-level service request. Click the service Description link in the Requisition Lines grid to access requisition details and to view and update the associated services.

If the requisition is going through the re-approval process, you can launch the process from this page.

Requester	Enter the requester of the service requisition. **Note.** You are only allowed to edit the requester if you are authorized to request on behalf of other users on the Requester Procurement User Preferences page.
Requisition Name	Enter the requisition name.
Priority	Select the priority of the service requisition. The default is medium priority.
Expiration Date	Displays the expiration date for the credit card. This field is available when you select a credit card number. You cannot change the expiration date.
Use Procurement Card	Select to indicate that you want to use a procurement card for this requisition. This check box is selected when you enter a credit card. If you deselect it, the system removes the credit card information from the requisition. When you select this check box, the system automatically selects the Use Procurement check box at the line level. You can also select to use a procurement card at only the requisition line level.

Requisition Lines

If you access a requisition line, the system only permits one service line per requisition; therefore, you cannot delete the line.

Line	Displays the line number assigned by the system.
Select Source Details	Click to view sourcing details for this requisition line.
Description	Click the link in the Description column to edit the service requisition.
Positions	Displays the number of positions for a resource-based or multi-resource requisition line. If the requisition line is a multi-resource service, then the system calculates the field value as the sum of all the number of positions for the services associated with the multi-resource service line.
Inc. Exp (include expenses)	Displays the expenses for the requisition line when you select to include expenses.
Modify Line/Accounting	Click the Modify Line/Accounting button to update the distribution information for multiple lines.
Add/Edit Comments	Add comments for the service requisition line. Comments appear to the supplier if the Send to Vendor check box is selected.
Add to Favorites	Click to add the selected line as a favorite that you can select when creating future service requisitions.

Add to Template(s) If PeopleSoft eProcurement is installed on your system with PeopleSoft Services Procurement and you have requisition lines for items, then you can use this check box to add the line as a catalog item to the template. However, if you select this check box for a PeopleSoft Services Procurement requisition line, you will receive an error message because you cannot add services to templates.

Managing Service Requisitions

This section discusses how to:

- Manage requisitions.
- View service requisition details.
- View filled services for requisition lines.
- Cancel requisitions or requisition lines.
- Close services requisitions.

Pages Used to Manage Service Requisitions

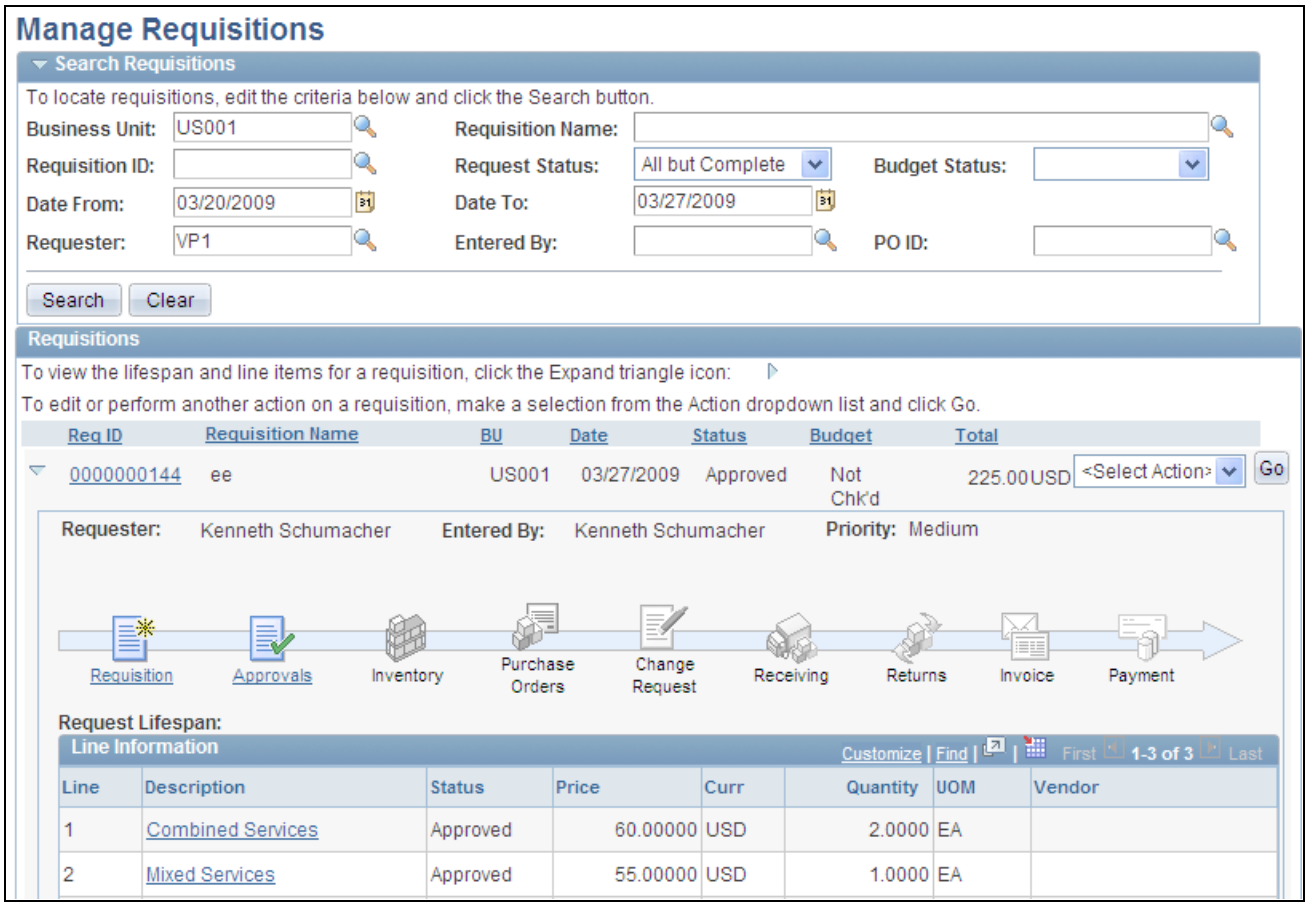
Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Requisitions	PV_REQ_STATUS	Services Procurement, Manage Requisitions	Manage requisitions that are entered by the service coordinator or requester. You can review existing service requisitions, edit them, view their statuses, cancel them, or access related sourcing and work order information.
Requisition Details	SPF_REQ_STATUS_PG	Expand the collapsible grid section for the requisition request and then click the Requisition button on the Manage Requisitions page.	View services requisition details.
Requisition Line Job Summary	SPF_REQ_SUMMARY_PG	Click the Job Title link on the Requisition Details page.	View the requisition line summary.

Page Name	*Definition Name*	*Navigation*	*Usage*
Requisition Line Position Details	SPF_REQ_LN_FILL	• Click the Filled Position link on the Requisition Details page. • Click the Filled Position link on the Job Summary page.	View individual position information for resource and multi-resource service requisition lines. Access the Filled Service Details page.
Filled Service Details	SPF_REQ_SERV_FILL	• Click the Number of Filled Positions button on the Requisition Details page. • Click the Number of Filled Positions link on the Job Summary page.	View filled services for a requisition line.
Requisition History	SPF_REQ_HISTORY	Click the Status link on the Requisition Details page.	Review the history of your requisition request, including the service coordinator or team that was assigned to the requisition at the time this history was recorded.
Change Request List	PV_CHNG_RQST_LIST	Click the Inquire Change Request link on the Manage Requisitions page.	Inquire about change requests.
Requisition to PO Xref (requisition to purchase order cross-reference)	RUN_POY100	Click the Requisition Report link on the Manage Requisitions page.	Run the Requisition to PO Cross-Reference report.
Requisition Schedule and Distribution	PV_REQ_APP_DTL_GRD	Click the Requisition Schedule and Distribution link on the Requisition Details page.	View the requisition schedule and description.
VAT Details	REQ_INQ_DIST_VAT	Click the VAT Details button on the Requisition Schedule and Distribution page.	View value-added tax (VAT) calculations and information for the selected schedule or distribution. **Note.** You only have access to VAT information if the PeopleSoft Purchasing business unit has enabled VAT on requisitions and VAT is applicable for the requisition.

Page Name	*Definition Name*	*Navigation*	*Usage*
Requisition Service Details	SPF_REQSUM_SERV_PG	Click the VAT Details button on the Requisition Schedule and Distribution page.	View requisition service details.
Requisition Life Cycle	PV_REQ_CYCLE_PAGE	Click the Requisition Life Cycle link on the Requisition Details page.	View the location of a requisition in the requisition life cycle.
Close Requisition	RUN_REQRECON	Services Procurement, Reconciliations, Close Requisitions	Close all qualified requisitions using the Run Close Requisitions process and generate the Requisition Reconciliation report.

Managing Requisitions

Access the Manage Requisitions page (Services Procurement, Manage Requisitions).



Manage Requisitions page

The Manage Requisitions page is the central location for maintaining requisitions. Use the Search and Sort features to streamline the search results for a requisition. Use the Expand Section button to view the lifespan and details for the requisition. Select the Select Action option to cancel, budget check, and edit the requisition.

Note. You can create commodity items (with PeopleSoft eProcurement) and services (with PeopleSoft Services Procurement) on the same requisition. Each has a separate line.

Note. You cannot edit sourced requisitions from this page. If a service coordinator edits the sourced requisition from the Review and Sourcing component, then the system tracks the changes according to the change control template assigned to business unit. However; the system does not submit the requisition for reapproval for any changes made to the requisition from the Review and Sourcing component even when the changed field is set up for reapproval on the change template.

Search Requisitions

Use this group box to define search criteria for managing requisitions. For example, you can search for requisitions based on the business unit and requisition name and ID or based on from and to dates. After defining the criteria, click the Search button to retrieve the selected requisitions. To delete all the criteria that you enter, click the Clear button.

Request Status Select to search for a requisition based on its request status. Statuses include, for example, *Service Complete,Denied,* and *Service Sourced.* If you leave the field blank, requisitions in all statuses are included in the search results.

Requester Enter a name to display requisitions that only this person enters. Leave this field blank to display requisitions for all requesters for whom you are authorized to view.

Entered By Select a user for whom you want to retrieve all requisitions that they created.

PO ID (purchase order ID) This field is not valid for Services Procurement. If you have PeopleSoft eProcurement installed, this is used to locate the requisition that is associated with the purchase order. Requisition purchase orders apply only to the commodity items (PeopleSoft eProcurement requisition lines). Service items are on the purchase order that is generated by the work order, not the requisition.

Requisitions

Use the Requisitions group box to view details about individual requisitions returned in the search results.

Expand Section Click to expand this section to view life-cycle information and requisition line information. After expanding the section, you can use the Collapse Section button to close the section.

When you expand a section, the system provides requisition life-cycle stage buttons that are highlighted with active links when they are complete or in progress. You can click an active button to view the details of a stage.

The Request Lifespan field displays buttons based on the top-line requisition status. Both PeopleSoft Services Procurement and eProcurement use this field with each having some shared and some product-specific buttons. Buttons specific to Services Procurement include Work Order, Time Sheet, Expenses, and Progress Log. When you click on a button, the system displays a list of related transactions.

The Sourcing button displays only the sourcing for the requisition. It does not display the work order sourcing for replacements or the individual child services of a multi-resource parent service. The Work Order button displays the top-line multi-resource work order along with the work orders for the services associated with the multi-resource work order.

Requisition ID Click to access the Requisition Details page, where you can view the details of the requisition.

Requisition Name Displays the name of the corresponding requisition.

BU(business unit) Displays the name of the business unit in which this requisition was created.

Date	Displays when the corresponding requisition was created.
Status	Displays the status of this requisition.
Budget	Displays the budget checking status for this requisition line. If your organization uses commitment control for any business unit, you can require a budget check. Values for this field are: *Not Chk'd* (not checked), which means the requisition has not been checked for the budget; *Valid,* which means that the requisition has been budget checked and is within the budget; and *Error,* which means the budget check encountered a problem.
Total	Displays the total cost of the requisition in the currency unit of measure.

Select Action

Select an action for the requisition and click the Go button. Values include:

- *Approvals:* When you select this value, the system takes you to the Approval Status page, where you can view the approval information for the requisition line.

- *Cancel:* Select to access the Requisition Details page, where you can cancel the requisition request. To cancel all eligible requisition lines, click the Cancel Requisition button. To cancel selected lines, select the box to the left of each requisition line to be canceled and click the Cancel Selected Lines button. In both cases, the system displays a Cancel Requisition Confirmation page, where you can enter a reason code and comments before you confirm the cancellation transaction.

  The sourcing status for the requisition is changed to Cancelled when you cancel it. The *Cancel* option is not available after a requisition has been filled.

  Note. Orphaned records or out-of-sync data can occur if you navigate away from the requisition without saving or canceling after you have already created service lines.

- *Change Tracking:* Select to access the View Requisition Change Tracking History, where you can view requisition changes that have been applied against the original requisition. The system must be set up for the Change Tracking feature and a change recorded against the requisition before this option is available.

- *Check Budget:* Select to check the requisition budget. The system automatically checks to ensure that the requisition is within a specified budget range.

  Note. When commitment control is enabled, the service coordinator cannot offer the position or release the manual work order until the requisition has been budget checked.

  Copy: Select to create a new requisition by copying the current requisition. When you select this value, the system displays the Create Requisition page with the original requisition. You can enter the new requisition name to create the new requisition.

- *Edit:* Select to access the Edit Requisition page. When you select this value, you access the original requisition page.

- *Undo-Cancel* Select to reopen the requisition. This option is available when the requisition has been cancelled. The system displays the Requisition Detail page when you select this option. Using that page, you can click the Reopen Requisition button to open the requisition. The system then displays the requisition in an Open status.

- *View Print:* Select to view the complete requisition in a report format. This includes all requisition lines and details. When you select to view the requisition, the system displays the message: Do you want to print the requisition with distribution details? Click Yes to include the distribution details for the requisition.

Requester Displays who created the original requisition. The system displays this value when you select the Expand button to view requisition information.

Entered By Displays who entered the requisition.

Priority Displays the priority of importance for the requisition. Values can be *High*, *Low*, or *Medium.*

Requisition Lifespan Displays the life cycle buttons for the requisition. You can click a button to view details about the life cycle event, such as approvals or sourcing.

Line Information

Use this grid box to view line information for the selected requisition. You must select the Expand Section button to display line information. Values that appear in the grid depend on the requisition's service method.

Description Click to view a description of the requisition line item.

Status Displays the status of this requisition line.

Positions Displays the number of positions associated with this requisition line. If the line is a multi-resource line, the system calculates the sum all the number of positions for the services associated to the multi-resource service line.

Filled Positions Displays the number of positions that have been filled for this service. If the service is a multi-resource service, the system calculates the sum the number of filled positions for the services associated to the multi-resource service line.

Price Displays the price for this requisition line. The price appears in the currency unit of measure.

	Click to extend the life of the requisition. When you extend a requisition, you must go to the latest extension of the requisition to extend it further. The system creates a new requisition ID and line by transferring the requester to the Create Services requisition page. The system verifies that the business unit, the service type of the requisition, and the requestor default setting permits extending the requisition. If the business unit or the service type or requestor default setting does not permit you to extend the requisition, then the system displays a message and does not extend the requisition. If you are extending a multi-resource requisition, the system copies all of the current services associated to the work order of the original multi-resource requisition. The system does not copy services that are cancelled, closed, or terminated within the actual end date of the work order.
Service Provider	Displays the person who provides the actual service.
Vendor	Displays the vendor defined for the requisition.
Create New Requisition	Click to access the Create Requisition where you can add a new requisition.
Inquire Change Request	Click to view change requests for PeopleSoft eProcurement. This link is not available if PeopleSoft Services Procurement only is installed on your system. A purchase order change request contains changes to a purchase order. See *PeopleSoft eProcurement 9.1 PeopleBook*, "Changing Requisitions and Using Change Requests," Understanding Requisition Changes and Change Requests.
Inquire Change Tracking	Click to access the View Requisition Change Tracking History page. You use this page to view changes that have been made to the requisition and that have been set up using the Change Tracking feature.
Requisition Report	Click to create a PeopleSoft Services Procurement report.

Viewing Service Requisition Details

Access the Requisition Details page (expand the collapsible grid section for the requisition request, and then click the Requisition button on the Manage Requisitions page).

Requisition Details page

The Requisition Details page provides basic information about the requisition, along with line and distribution information. It also provides contract and purchase order information when the requisition has been processed into a purchase order or contract.

Note. This page displays the pre-encumbrance balance for the requisition. When you use commitment control, the system deducts each type of financial obligation from the budget and tracks it according to obligation type. This functionality enables you to determine the monies that you have committed in pre-encumbrances.

Line Item Description

Status	Click to access the Requisition History page, where you can view the history of the requisition line details.
Positions	Displays individual instances of a resource-based service. The number of positions for a service line determines the number of service providers who will fill the requisition line. View the total number of positions available for the service request.
Filled Positions	Displays the number of positions that are already filled for the service request, including multi-resource services. When you click the link, the system accesses the Filled Services Detail page with services associated to the multi-resource requisition line.
Requisition Life Cycle	Click to view the location of a requisition in the requisition life cycle.
Requisition Schedule and Distribution	Click to view the requisition schedule and description.

Click to access the Work Order page, where you can view information about the linked work order.

Note. This button only appears if you have a work order linked to the requisition line.

See Also

Chapter 18, "Managing Work Orders," page 413

Chapter 8, "Setting Up PeopleSoft Services Procurement Workflow," page 227

Chapter 15, "Managing PeopleSoft Services Procurement Sourcing," page 339

Viewing Filled Services for Requisition Lines

Access the Filled Service Details page (click the Number of Filled Positions button on the Requisition Details page).

This page displays the filled services associated to the multi-resource requisition line. The top section of the page displays the multi-resource top-line information. If the position is a single position service, then the page displays the name of the service provider. If the position is a multi-resource service position, then the system provides a link to the Requisition Line Position Detail page.

Service Type Displays the service type of the filled requisition line.

Service Displays the service of the filled requisition line.

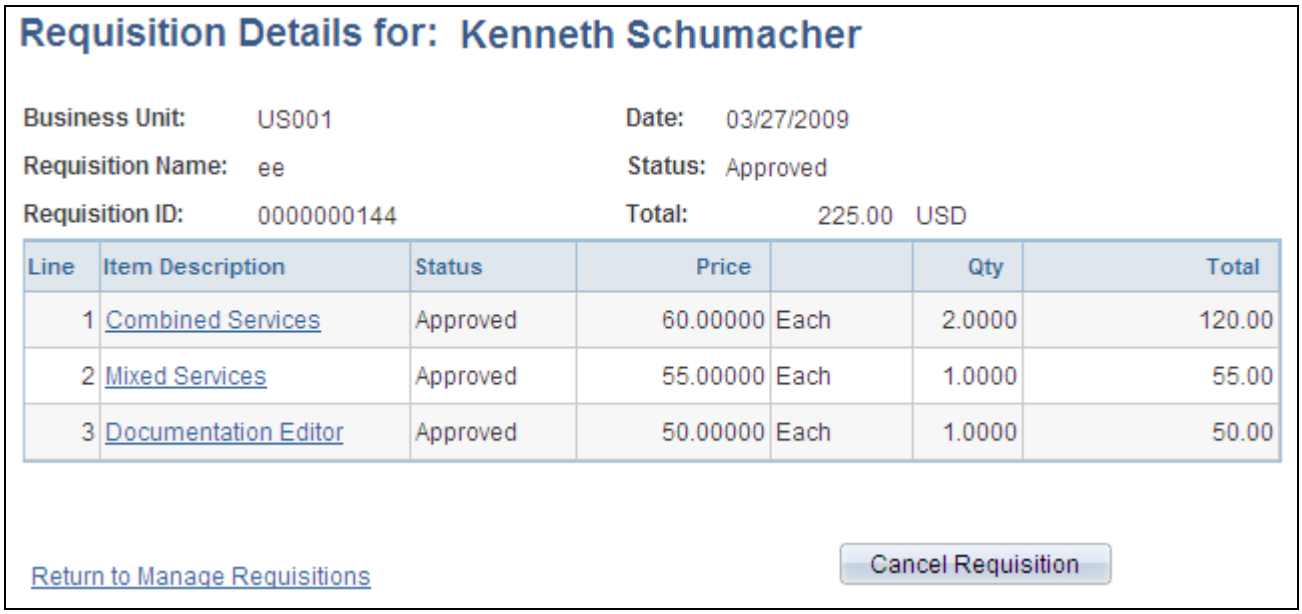
Qty (quantity) Displays the number of positions filled for the requisition line. Multi-resource services can have multiple services with multiple positions. In this case the quantity will reflect the sum of the position quantities for all of the services.

Service Provider Displays the name of the service provider when the requisition line has only one position. If the requisition line has multiple positions, then a link appears in the field. Click the link to access the Requisition Line Position Detail page, which displays the service providers assigned to this service.

Manage Requisitions Click to return to the Manage Requisitions page.

Canceling Requisitions or Requisition Lines

Access the Requisition Details for page (select the *Cancel* option in the Select Action field on the Manage Requisition page, and click Go).



Requisition Details for page

You can cancel requisitions on the Requisition Details page, which you access from the Manage Requisitions page. In addition, you can cancel individual requisition lines from either the Manage Requisitions page or the Requisition Details page.

To access the Requisition Details page and cancel a requisition, select the *Cancel* option from the Select Option list of values on the Manage Requisitions page and then click the Go button.

After you click the Go button on the Manage Requisition page, the system accesses the Requisition Details page, where you can cancel the entire requisition if you have both PeopleSoft eProcurement and Services Procurement installed or a selection of lines if you have only Services Procurement installed.

You can also cancel individual requisition lines one at a time directly from the Manage Requisitions page by opening the line details for the requisition and selecting the Cancel button on the individual line.

If you cancel a requisition from the Requisition Details page, select the Cancel Requisition button. To cancel selected lines, select the check box to the left of each requisition line to be cancelled and click the Cancel Selected Lines button.

Note. When you cancel the requisition or requisition line, the system displays a Cancel Requisition Confirmation page, where you can enter a reason code and comments before confirming the cancellation transaction. The reason code functionality is available if the business unit is defined with optional or mandatory reason codes for requisition cancellation.

Note. When you cancel a requisition line, all affected parties are notified. The system also removes the cancelled requisition line entry from any affected worklists.

Closing Services Requisitions

Use the Close Requisitions page (Services Procurement, Reconciliations, Close Requisitions).

Use this page to close all qualified services requisitions and to run the Requisitions Reconciliation Report.

See *PeopleSoft Purchasing 9.1 PeopleBook*, "Closing Purchase Orders."

See Appendix E, "PeopleSoft Services Procurement Reports," page 715.

Approving and Denying Requisitions

This section discusses how to use the requisition approval process.

- Manage requisition approvals.
- Approve and deny requisitions.

See Also

PeopleTools PeopleBook: Workflow Technology

Chapter 8, "Setting Up PeopleSoft Services Procurement Workflow," Setting Up Requisition Workflow, page 235

Pages Used for Approving Requisitions

Page Name	*Definition Name*	*Navigation*	*Usage*
Monitor Approvals	EOAW_ADM_MON_SRC	Services Procurement, Manage Approvals	Manage Approval Framework approvals. **Note.** You can also use the Worklist to access requisitions awaiting you approval.
Requisition Approval	PV_REQ_APPROVAL	Home, Worklist Select the requisition ID that needs approval.	Approve, deny, or hold a requisition during the workflow approval process.
Requisition Approval confirmation	PV_REQ_APPR_CONFRM	Click the Approve button on the Manage Requisition Approvals page.	Confirm or deny the approval of a requisition or requisition line.
Item Description	PV_NEW_ITM_DESCR	Click the linked item.	View the requisition line item description.
Comments	PV_REQ_APPLN_WK_COMMENTS	Click the Comments button.	View requisition comments.

Managing Requisition Approvals

Access the Monitor Approval page (Service Procurement, Manage Approvals).

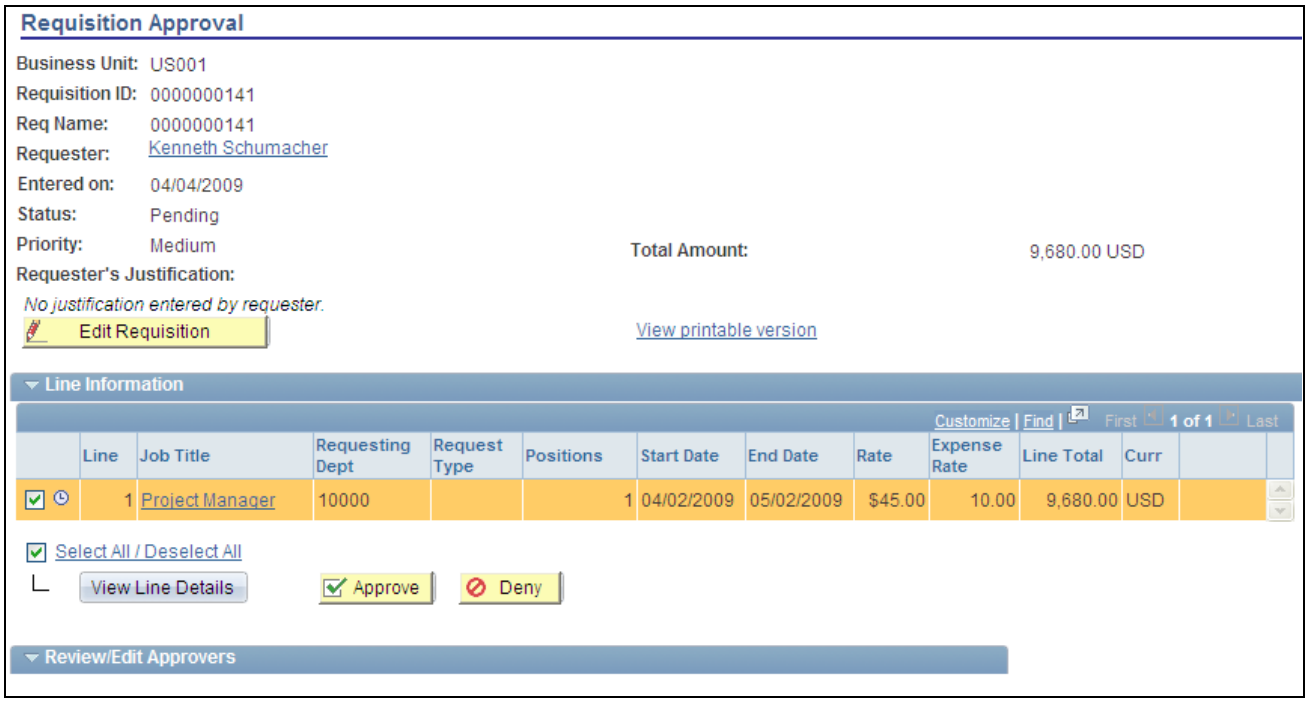
In addition to using the Worklist to locate and approve requisitions, you can use this page to search for requisitions, review additional requisition information, and select requisitions for approval processing. Search criteria includes searching for requisitions based on their status. Status field values include:

- *Approved:* Select to view requisitions that have you have approved.
- *Denied:* Select to view requisitions for which you have denied approval.
- *On Hold:* Select to view requisitions that have been placed on hold.
- *Pending:* Select to view requisitions or requisition lines that are waiting for your review and approval.
- *Pushedback:* Select to view requisitions that have been sent back to the requester for more information.

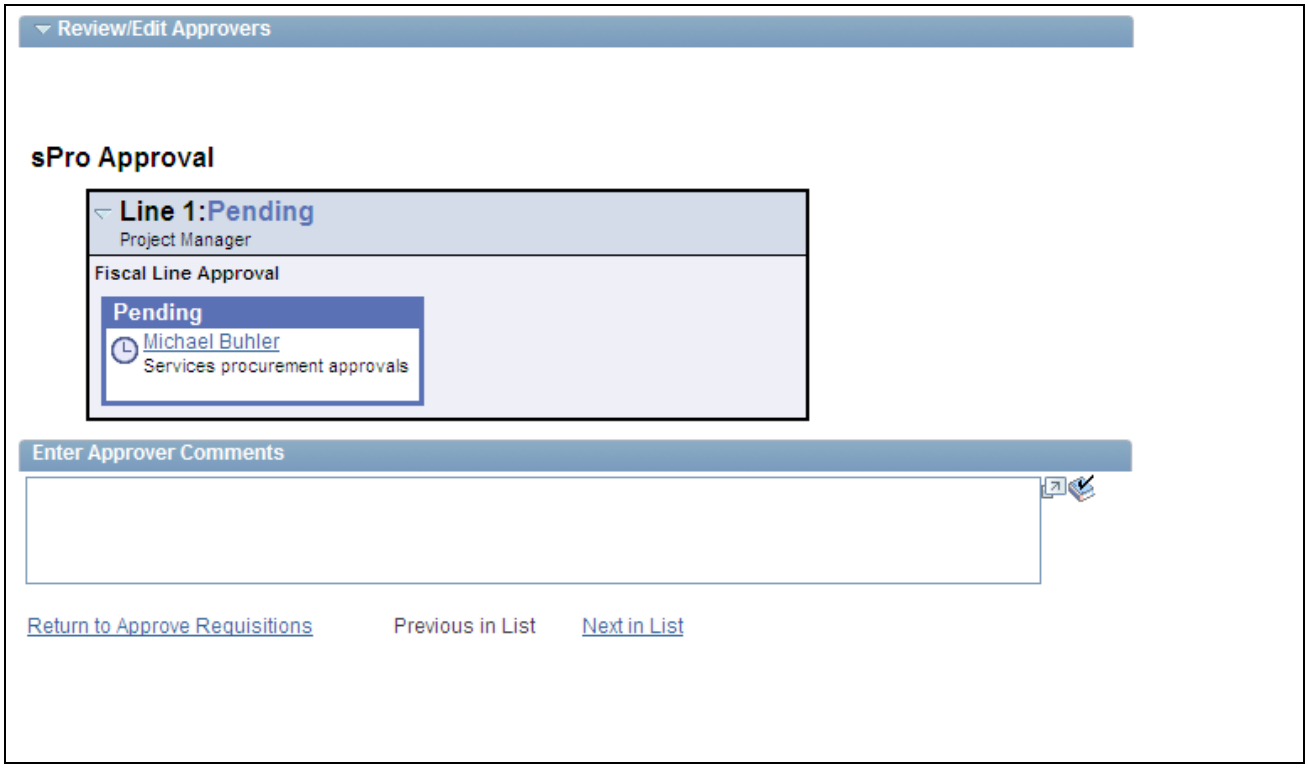
After retrieving search results, you can click the requisition link to access the Requisition Approval page where you can process the approval.

Approving and Denying Requisitions

Access the Requisition Approval page (Service Procurement, Manage Approvals, select a requisition for approval).



Requisition Approval page (1 of 2)



Requisition Approval page (2 of 2)

Use the Requisition Approval page to approve, deny, or push back a requisition during the workflow approval process. You can also add approvers and reviewers to the workflow routing. If you are a reviewer, this page is display-only. You can also access the page using the eProcurement Manage Approvals component.

Available actions change depending on the authorizations for each user accessing the Requisition Approval page. For example, an approver, might not have the authorization to edit the document, so the Edit Document button does not appear and the approver can only enter comments as part of an approval or denial.

Note. You must have a workflow role that is assigned for requisition approval or else you must be the requester who entered the requisition.

Click the Edit Requisition link to access the Maintain Requisitions - Requisition page. You can make updates to the requisition before approving it.

Line Information

This section displays information about requisition lines.

View Line Details	Click to view all lines associated with the requisition. The system creates a scrollable report with the requisition details.
Approve	Click to approve the requisition and access the Requisition Approval confirmation page. Using the page you can view any additional approvals. The approval is immediate when you click the Approve button.
Deny	Click to deny this requisition. A worklist entry is sent to the original requester with any comments that you enter. **Note.** When you click this button, you access the Requisition Approval confirmation page, where you can enter a reason code and comments for the denied requisition or requisition line.

Review/Edit Approvers

Use this section of the Requisition Approval page to review aspects of the approval flow, such as who has approved the requisition or who the requisition goes to after your approval. The grid displays all approval steps for the paths that are defined in the approval stage. Each stage is identified by a heading within the grid. The first stage must be approved before the next stage begins the approval process. When a stage begins the approval process, the system updates the approval status in the heading and sets the next stage or stages to the Awaiting Further Approvals status.

|+|	Click to enter another approver or reviewer for this requisition. New approvers are added after the approval. The system adds the requisition to the new approver's worklist, and the approver must approve the requisition before it can continue through the approval process. You can add any combination of approvers and reviewers to the requisition by clicking the Insert Approver button. **Note.** Another, identical button in this section is used for another function. Click the Start New Path button to start a new approval path for the requisition approval process.

User ID Enter the ID for the user that you add as an approver or reviewer of this requisition.

Note. If you click the Start New Path button, this field is used to add a new approver or reviewer to the new requisition approval path.

Note. After a requisition is fully approved, it is removed from the reviewer's to do list whether or not it has actually been reviewed. The requisition then appears in the Worklist belonging to the service coordinator responsible for sourcing the requisition.

Enter Approver Comments

Use this box to enter comments about the requisition. The system keeps the comments for others to review. If comments are required when you deny an approval, the system highlights the box when you click the Deny button without entering comments. You must enter a comment before denying the requisition. After you enter comments, click the Deny button again to deny the approval of the requisition.

See Also

Chapter 14, "Creating and Managing Services Procurement Requisitions," page 285

Tracking Requisition Changes

This section provides an overview of requisition change tracking and discusses how to:

- Define change templates.
- Setup reason codes.
- Change requisitions.
- View requisition change history.
- Define change tracking filter criteria.

Understanding Requisition Change Tracking

You can change requisitions and track the history of those changes using the Change Request feature. The feature enables you to determine the fields for which the system tracks changes. The PeopleSoft system uses a common Change Request component for purchase orders, PeopleSoft Purchasing requisitions, PeopleSoft eProcurement and Services Procurement requisitions, and contracts.

For Services Procurement change templates, the system loads the appropriate records so that you can select to:

- Track individual fields for changes.

- Reapprove requisitions when a specific field has changed.

PeopleSoft Services Procurement change tracking set up depends on other whether other PeopleSoft applications are installed on the PeopleSoft system. .

For more information about records and fields available for tracking, see the PeopleSoft 9.1 Source-to-Settle Common Information PeopleBook.

See *PeopleSoft Source-to-Settle Common Information 9.1 PeopleBook*, "Defining Procurement Options," Understanding Change Template.

For more information about setting up change requests with PeopleSoft Services Procurement with eProcurement, see the PeopleSoft eProcurement 9.1 PeopleBook. .

See *PeopleSoft eProcurement 9.1 PeopleBook*, "Changing Requisitions and Using Change Requests," Understanding Requisition Changes and Change Requests.

Pages Used to Track Services Procurement Requisition Changes

Page Name	***Definition Name***	***Navigation***	***Usage***
Change Template	CHNG_ORD_TEMPLATE	Services Procurement, Define Services Procurement, General Setup, Change Template	Define requisition change templates.
Reason Codes	SPB_REASONCD_BU	Services Procurement, Define Services Procurement, General Setup, Business Unit Setup, Services Procurement Defn Select the Reason Code Setup tab.	Define reason codes. See Chapter 4, "Setting Up PeopleSoft Services Procurement," Setting Up Reason Codes, page 52.
Procurement Change Reason Codes	BUS_OPT_PM_REASON	Services Procurement, Define Services Procurement, Business Unit Definitions, Services Procurement Business Unit Defn	Define Business Unit specific options for Services Procurement, including reason code usage for change tracking
Edit Requisition	PV_REQ_FORM	Services Procurement, Manage Requisitions Click Edit in the Select Action field.	Change requisitions.
Confirmation	SP_REASONCD_DTL	Click the Go To Submit Requisition button on the Edit Requisition page.	Enter a reason code and comment for making requisition changes that are being tracked.

Page Name	*Definition Name*	*Navigation*	*Usage*
View Requisition Change Tracking History	PV_CHNG_TRK_HIST	Services Procurement, Define Services Procurement, General Setup, Change Tracking History	View requisition change tracking history.

Defining Change Templates

Access the Change Template page (Services Procurement, Define Services Procurement, General Setup, Change Template).

You use the Change Template page to define fields against which you want to track changes. You can define change templates for requisitions, purchase orders, and contracts. You can also define changes for sourced requisition fields that were initiated from the PeopleSoft Services Procurement application. To define a change template:

1. Select a change template type.

   Change template types are the record collections from which you select fields to include in change tracking. PeopleSoft provides predefined change template types for purchase orders, contracts, and requisitions. As an example of template type contents, when you select a requisition template type, it contains records for which you can track changes, such as requisition header, line, and schedule fields. Template types can have multiple change templates associated with them.

2. Enter a change template ID.

   You use change templates to create a set of fields that are eligible for change tracking based on the records for the template type that you select. When this change template is selected to record changes for PeopleSoft Services Procurement, the system track changes to the fields. Depending on product installations, the change template is defined at the business unit level for Purchasing when PeopleSoft eProcurement and Service Procurement are installed. The change template is defined on the Service Procurement Definition page when Services Procurement only is installed.

3. Select a record.

   When you select a value in the Record field, the system displays all the fields within that are available for change tracking.

4. Use the Record Fields group box to define the fields for which you want to track changes.

5. After you save the record, you can select another record

Copy Template

Select an existing change template that you want to copy to create a new template. The template type that you are creating must match the template type from which you want to copy information. When you select a value, the system replaces existing record and field values with values from the copied template. You can then make changes to the new template.

You can also copy a template into an existing template. The system removes the existing data and replaces it with the copied template.

Record

Select a record for which you want to define fields for change tracking. If PeopleSoft Service Procurement only is installed, both eProcurement and Services Procurement records are available.

Note. If you select the *REQ_COMMENTS* record, the only field available for change tracking is *Status.* The system tracks deleted comments only and saves the comment key to the corresponding change track table and inactivates the comment in REQ_COMMENTS table.

Track Change

Select the check box that corresponds to the field for which you want to track changes. You can go through each record and select change tracking fields. After making your selections, click the Save button to store the update.

Field Valueand**Description**

Displays the field value and description. The fields that appear in this field belong to the record that you selected in the Record field.

Reapprove

Select to indicate that if the corresponding field is updated, then the change will initiate a reapprove process for the requisition. If any field in the change template is marked for reapproval and changed in the pending or approved requisition, then the requisition is resubmitted to the Approval Workflow Engine.

You cannot re-approve a requisition from the Manage Sourcing page. For Services Procurement fields that are marked for change tracking and re-approval on the change template, if the field is modified by the service coordinator using the Review and Sourcing component, then the system tracks the updated field but does not resubmit the requisition for re-approval.

Update PO (update purchase order)

This setting is not applicable for Services Procurement and is not editable for Services Procurement records. If PeopleSoft Services Procurement only is installed, this check box is not available.

Label Type

Select a label type. The system uses the label type to determine how this field appears on the Change Template page. Values include:

Custom: Indicates a field label that you specify. When you select *Custom*, the Label Text field appears where you can enter the custom label for the field. To save the custom label, the Track Changes check box must be selected.

Page: Indicates that a field label is taken from another page. When you select *Page*, the Page Name field becomes available for entry. Enter the page object name from which you want to take the field label.

Rec Long (record long): Indicates that a field label is taken from the long version of record field text defined for the field.

Rec Short (record short): Indicates that a field label is taken from the short version of the record field text that is defined for the field.

Page Name

Select a page name from which to take a field label. This field appears when you select *Page* in the Label Type field.

Label Text Enter the text that you want to use for the field custom name label.

Assigning Reason Codes

Access the Reason Codes page (Services Procurement, Define Services Procurement, General Setup, Business Unit Setup, Services Procurement Defn, and select the Reason Code Setup tab).

This page contains a listing of reason codes that you can maintain for Services Procurement. You can also use the page to define the reason code for procurement changes so that the code is available for selection as a PeopleSoft Services Procurement change reason. Services Procurement uses the purchasing record BU_OPT_PM_RSN to store the reason code setup for change tracking.

Use these steps to make reason codes available for use with Services Procurement:

1. Click the Change Reason Code link at the bottom of the Reason Code Setup page.
2. Select the setID and click the Search button to access the Purchasing Options page.
3. Click theChange Reason Codeslink.

   The Procurement Change Reason Codes page appears.
4. Select a reason code in the Default Reason Code field.

   You can also make track change mandatory and require comments for changes using this page.
5. Click the OK button and then click Save on the Processing Options page.

   After you define the reason code, Service Procurement retrieves the tracking change reason code setup from the Purchasing Processing Option component and displays it as display-only row of data in the Reason Code Setup page. You cannot edit this reason code using this page. You must return to the Purchasing page to make changes to the code

See *PeopleSoft Purchasing 9.1 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options," Defining Reason Codes for Change Requests and Change Orders.

Changing Requisitions

Access the Edit Requisition page (Services Procurement, Manage Requisitions, and click Edit in the Select Action field).

You create requisition changes in PeopleSoft Services Procurement using the Edit Requisitions page.

Note. You cannot edit sourced requisitions using the Edit Requisition or Manage Requisitions page. If the service coordinator edits the sourced requisition from the Manage Sourcing page, then the system tracks the changes based on the change request template assigned to the business unit. However, the system does not submit the requisition for reapproval for any changes made on the requisition from the Manage Sourcing page even if the modified field is setup for reapproval on the change template.

After you complete the changes, click the Go to submit requisition button. When in use with PeopleSoft eProcurement, Services Procurement passes the tracked change and reason code to eProcurement. When fields are tracked, such as for line, competencies, or bid factors, then the change tracking and reason code setting is set so that eProcurement can trigger the reason code logic when you click the Save and submit button.

Note. If the Service Coordinator field is set for tracking, changes initiated from the Replace Coordinator or Replace VMS Coordinator pages will also be tracked.

Note. When the Replace Service Coordinator utility is used to change the assigned service coordinator for requisitions, the change tracking rules are followed. Thus, the change tracking template is checked to determine whether the Service Coordinator field is being tracked, and if so a change tracking record is created.

Viewing Requisition Change Tracking History

Access the View Requisition Change Tracking History page (Services Procurement, Define Services Procurement, General Setup, Change Tracking History).

The Requisition Change History feature provides an audit trail of changes that were made to a PeopleSoft Services Procurement requisition. The history shows all the changes made to the service requisition information sections including header changes, line changes, distribution changes, competencies, bid factors, and preferred supplier changes. Informational messages on the page indicate when there have been no changes to an information section.

You can search for requisitions to view based on business unit, requisition ID ranges, requesters, and date range. After you enter the criteria and click the Search button, the system populates the page with requisitions that match the criteria. Search results are returned by descending requisition ID. To view changes for each information section, click the Expand section button.

Req ID (requisition ID) and **Requisition Name**	Displays the requisition and its name. Click the Req ID link to view the requisition.
Requester Name	Displays who created the requisition.
Modified By	Displays the user ID of the person who last updated the requisition
Last Changed	Displays the date and time of the change.
Change Batch	Click to access the ePro Requisition Batch Changes page where you can view the change order number and revision date for the batch job.
Filter Criteria	Click to access the Change Tracking Filter Criteria page where you can search for changes based on, for example, reason codes or requisition line changed fields. These criteria are applied against grid contents.

Click the Expand Section button to view requisition changes. The system displays a message that indicates the records to which no change have been made. To view changes made to each record, click the Expand Section button for each section.

The sections display basic information about the changes, such as the batch and line, change type, and the change value. The reason code used for the change also appears.

Entering Reason Codes

Access the Confirmation page (click the Go To Submit Requisition button on the Edit Requisition page).

You use this page to select a reason code for making the requisition change. You can define a default value for the reason code using the Procurement Change Reason Codes page. The code can be used for change request in the PeopleSoft Services Procurement 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 change requests. To access the Procurement Change Reason Codes page, select Set Up Financials/Supply Chain, Business Unit Related, Purchasing, Purchasing Options. Then click the Change Reason Code link at the bottom of the page.

Reason Code Select a code. You can use the default code or override it with another code.

Comments Enter a reason for the requisition change. If a default value for the change has been defined, it appears. You can override the value.

Defining Change Tracking Filter Criteria

Access the Change Tracking Filter Criteria page (click the Filter Criteria link on the View Requisition Change Tracking History page).

Use this page to reduce the number of search results in each grid for specific reason codes, batch order changes and individual fields. After you populate the grids on the View Requisition Change Tracking History page with the search results, you can, for example, use the filter criteria on this page to reduce the number of requisition fields returned for the View Requisition Change Tracking History grids. You can select a value in each field to include in the search results.

Reason Code Select a specific reason code for which you want to view tracking history. If you make other change selections on this page, they will be limited to those that were made using this reason code.

Change Order Number Select a specific change order number for which you want to view tracking history. If you make other change selections on this page, they will be limited to those that were made using this change order number.

Requisition Header Select a header field for which you want to view changes for a requisition. The fields that are available for selection are those fields that are eligible for use with tracked changes. Fields must first be selected for change tracking using the change template. Then, when changes have been made to the field for the selected requisition, the field appears in the search results when you click the Search button.

Requisition Line Select a requisition line field for which you want to view changes for a requisition. The fields that are available for selection are those fields that are eligible for use with tracked changes.

Requisition Schedule	Select a requisition schedule field for which you want to view changes for a requisition. The fields that are available for selection are those fields that are eligible for use with tracked changes.
Search	Click to filter the search results to the criteria that you defined. The system returns to the View Requisition Change Tracking History page with the results of the search.
Clear	Click to remove all previous selections on this page.
Cancel	Click to return to the View Requisition Change Tracking History page.

Chapter 15

Managing PeopleSoft Services Procurement Sourcing

This chapter discusses how to:

- Source requisitions.
- Manage work order sourcing.

Sourcing Requisitions

This section provides overviews of services requisition sourcing rules and the requisition sourcing process and discusses how to:

- Access requisitions for sourcing.
- View the worklist.
- Source requisitions.
- View activities by requisition.
- Adjust bid factor weightings.
- Manage sourcing rules by requisition line.
- Defining requisition rate details.
- Reassign requisition lines.
- Use the sourcing review.
- View the sourcing history.

Understanding Services Requisition Sourcing Rules

PeopleSoft Services Procurement sourcing rules enable the service coordinator to send approved requisitions to suppliers who are best qualified to fill a requisition. When service requisitions are submitted or approved, if the business unit settings are set appropriately, service coordinators can source the requisitions using predefined sourcing rules.

Before you can source a requisition, the following conditions must be met:

- The requisition must be approved.

  Note. In most cases, the requisition must be approved prior to sourcing. However, if you've selected the Allow Sourcing Prior to Approval option on the Services Procurement Business Unit page, you can source a requisition request after it has been submitted for approval.

- Suppliers must be defined for the business unit supplier network.

PeopleSoft Services Procurement sourcing rules enable you to define suppliers by different attributes to streamline the sourcing process. Suppliers can be defined by region to ensure that you hire only service providers who are located near you to minimize travel costs.

Suppliers who provide resource-based services can be defined by service type. This enables you to define which suppliers provide the best candidates for a particular service type. To further refine the resource-based supplier list, you can define suppliers by region and service type combination.

Suppliers who provide deliverables-based and multi resource services can be defined by service/project role. This enables you to define which suppliers best fit a particular service. To further refine the deliverables-based and multi resource supplier list, you can define suppliers by region and service combination.

Using the Services Procurement business unit, you can determine which sourcing rule takes precedence, the region or the service or service type. If you select region, the system looks first for suppliers who match the region and service or service type, then for suppliers matching that region, then for suppliers who match the service or service type, and lastly, for suppliers according to business unit.

You can also use bid factor criteria to determine the top bid submittals for a particular requisition. You can source requisitions to both internal and external suppliers.

PeopleSoft Services Procurement provides supplier metrics to help score, analyze, and compare suppliers based on various aspects of the requisition life cycle. Use supplier scoring to determine the best suppliers to satisfy requisition requirements.

See Also

"PeopleSoft Services Procurement Preface," page xxiii

Chapter 25, "Supplier Scoring for PeopleSoft Services Procurement," page 643

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Understanding Bid Factors, page 117

Understanding the Requisition Sourcing Process

Here is an overview of the procedure for sourcing a requisition:

1. Access the Manage Sourcing page.

   Click the link for the requisition ID that you want to source.

2. Access the Sourcing Selection page.

   If the business unit is set up for sourcing prior to approval, select pre-approval pending or approved requisition lines to source to suppliers that are listed according to the sourcing rules. If the business unit is not set up for sourcing prior to approval, select only approved requisition lines to source.

3. Access the Reassign Requisition page.

   If the requisition line should be sourced by another service coordinator, you can reassign it to the appropriate service coordinator. The system creates a worklist entry for the new service coordinator.

   Note. You can access this page only if your system administrator gives you the proper permission to reassign requisitions.

   Note. You can only reassign a requisition before you source it to a supplier.

4. Click the Bid Factor Weighting link on the Sourcing Selection page to access the Bid Factor Weighting page.

   Use this page to adjust your bid factor weightings for a specific requisition.

5. Click the Rules by Requisition Lines link on the Sourcing Selection page to access the Sourcing Rules by Requisition Lines page.

   Use this page to change the sourcing preferences on the requisition.

   Note. You can access this page only if your system administrator gives you the proper permission on the Service Coordinator Defaults page. Changing information on the Sourcing Rules by Requisition Lines page overrides all previously defined sourcing to preferred suppliers, and it also refreshes and filters a new list of suppliers that meet the new sourcing preferences.

6. Click the Submit button at the bottom of the Sourcing Selection page to submit requisitions to the selected list of suppliers.

   Note. The Submit button triggers a PeopleSoft Strategic Sourcing event. All bid factors are associated with this event.

7. Access the Sourcing Review page, and review the list of suppliers to whom you have sourced the requisition.

8. Access the Sourcing History page, and view the history for individual suppliers.

Pages Used to Source Requisitions

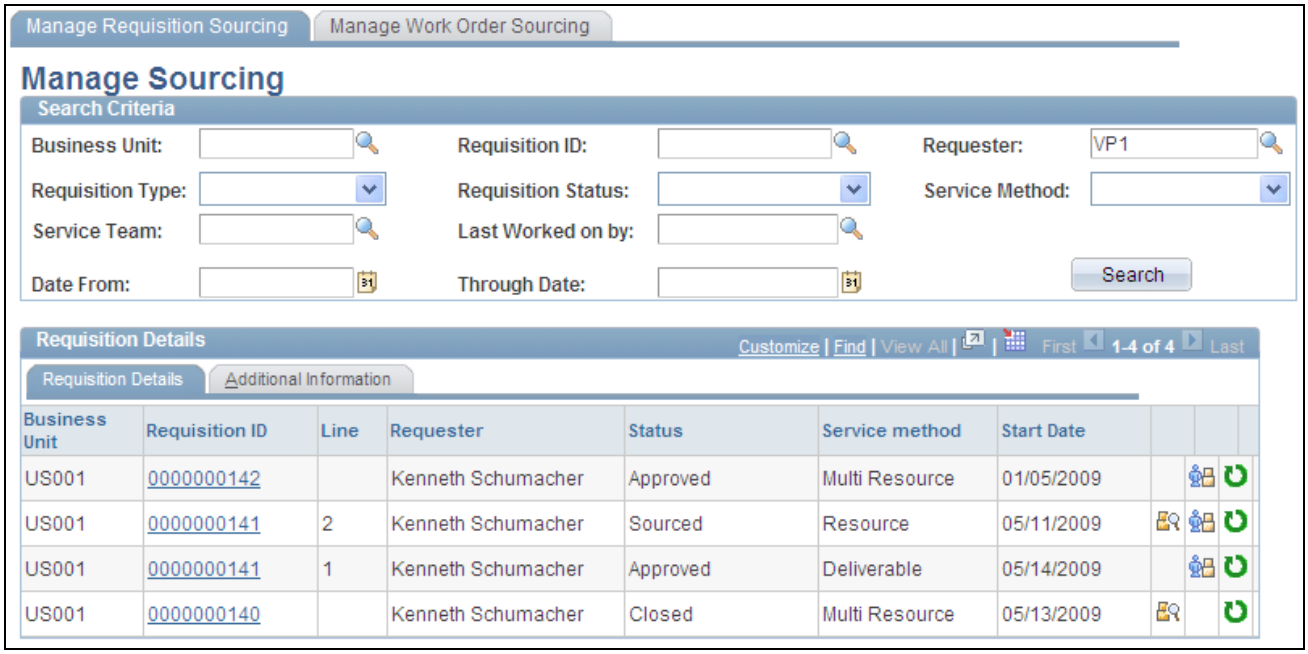
Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Sourcing	SPF_SRC_MANAGE_PG	Services Procurement, Review and Source	Access requisitions for sourcing.
Worklist	WORKLIST	Home, Worklist	View the worklist where you can locate approved requisitions for sourcing using the worklist filter *sPro Approved Requisition.*
Sourcing Selection	SPF_SOURCE_SELECT	Click the Sourcing Select button on the Manage Sourcing page.	Sourcing requisitions.

Page Name	*Definition Name*	*Navigation*	*Usage*
Activities by Requisition	SPF_REQ_ACT	Click the Activities by Requisition link on the Sourcing Selection page.	View activities defined for a requisition. You can add activities only if *Allow add activities* is enabled for the selected service. **Note.** The Activities by Requisition link appears only for deliverables-based requisitions.
Bid Factor Weighting	SPF_BDFTR_WEIGHT	Click the Bid Factors Weighting link on the Sourcing Selection page.	Adjust bid factor weightings for a specific requisition.
Sourcing Rules by Requisition Line	SPF_SRCRULES_REQ	Click the Sourcing Rules by Requisitions link on the Sourcing Selection page.	Managing sourcing rules by requisition line. If you have the proper permission, you can change the sourcing preferences for the requisition.
Requisition Rate Details	SPF_DEFN_REQ_RATES	Click the Define Requisition Rates button on the Manage Sourcing page.	Define requisition rate details.
Reassign Requisition Line	SPF_SRC_REASSIGN	Click the Reassign link on the Sourcing Selection page.	Reassign a requisition line to a different service coordinator.
Sourcing Review	SPF_SOURCE_REVIEW	Click the Sourcing Review link on the Sourcing Selection page.	Using the sourcing review.
Sourcing History	SPF_SOURCE_HISTORY	Click the Sourcing History button on the Sourcing Review page.	View sourcing history.
Requisition Life Cycle	PV_REQ_CYCLE_PAGE	Click the Requisition Life Cycle button on the Managing Sourcing page.	View the requisition life cycle.
Sourcing Selection	SPF_SOURCE_SELECT	Click the link on the Worklist page that corresponds to the requisition ID that you want to source.	Enter sourcing requirements.
Job Summary	SPF_REQ_SUMMARY_PG	Click the linked requisition ID.	View a summary of the requisition job requirements.

Page Name	Definition Name	Navigation	Usage
Location Address	SPF_ADDRESS_LOC	Click the linked location code.	View the location where the service will be performed.
Sourcing History	SPF_SOURCE_HISTORY	Click the Sourcing History button on the Sourcing Review page.	Review sourcing history.
Supplier Scoring Results	SPB_SUP_SCR_RSLT	Click the Score Analysis button on Additional Information tab on the Sourcing Selection page.	View supplier scoring results.

Accessing Requisitions for Sourcing

Access the Manage Sourcing page (Services Procurement, Review and Source).



Manage Sourcing page

The Manage Sourcing page is the central location for accessing and maintaining sourcing information for requisitions and work orders. When you initially access the page, the system displays the requisitions that belong to you. Select the Manage Work Order Sourcing tab to view and access work orders for sourcing. You can enter search criteria to limit the search results.

To search for the requisitions associated with the team but either not yet assigned or assigned to another team member, first select a valid service team, then select a service coordinator and click the Search button. The Service Team and Service Coordinator fields are available only for service coordinators assigned to a team. If you are on a team, all the teams for which you are a member appear in the Service Team field list of values. If you aren't on a service team, you can access requisitions only where you are the service coordinator. If you select a requisition from another team member, you have the same access and change privileges for the requisition as the other team member. If you act on a requisition, the system updates the requisition to show you as the service coordinator. This indicates who last worked on the requisition.

You can also source multi-resource transactions. The parent multi-resource service is sourced from the requisition, with visibility of any related individual child services that have been associated to the requisition. However, those individual services are not filled at this time. Only the parent multi-resource service is sourced initially. The individual child services can be sourced with the work order sourcing functionality after the parent multi-resource service has been filled and the related parent work order has been created and approved.

Requisition Type Select to view original or extended requisitions.

Requisition Status View requisitions by status. Statuses include:

- *Approved*
- *Canceled*
- *Closed*
- *Denied*
- *Filled*
- *On Hold*
- *Open*
- *Pending*
- *Pre-Approval Pending*
- *Pre-Approval Sourced*
- *Sourced*

Note. If you select the *Pre-Approval Pending* or *Pre-Approval Sourced* value, the system returns requisition values that were sourced but not yet approved.

These options are available only when you select the Pre-Approval Parallel Sourcing option on the PeopleSoft Services Procurement Business Unit page.

See Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining PeopleSoft Services Procurement Business Units, page 37.

Service Method	Select a method on which to base a search. Methods include: *Deliverable* *Multi Resource* *Resource*
Service Team	Select a specific team of service coordinators.
Last Worked on by	Select a user ID on which to base a search. This is the user who was the last person to change the requisition.
From Date and **Through Date**	Define a date range on which to base a requisition search.

Requisition Details

This tab displays the results from the search criteria that you entered.

	Click to access the Sourcing Review page.
	Click to access the Sourcing Selection page.
	Click to access the Requisition Life Cycle page.
	Click to cancel the selected requisition line. **Note.** When the service coordinator cancels a requisition line, a confirmation page appears, and the service coordinator can enter the reason code and related comments if the business unit is set up to use reason codes.
	Click to access the Define Requisition Rates page, where you can define requisition rate details.

Additional Information

Select this tab to view additional information about the requisition, such as the service team, service coordinator, and requisition type.

Viewing the Worklist

Access the Worklist page (Home, Worklist).

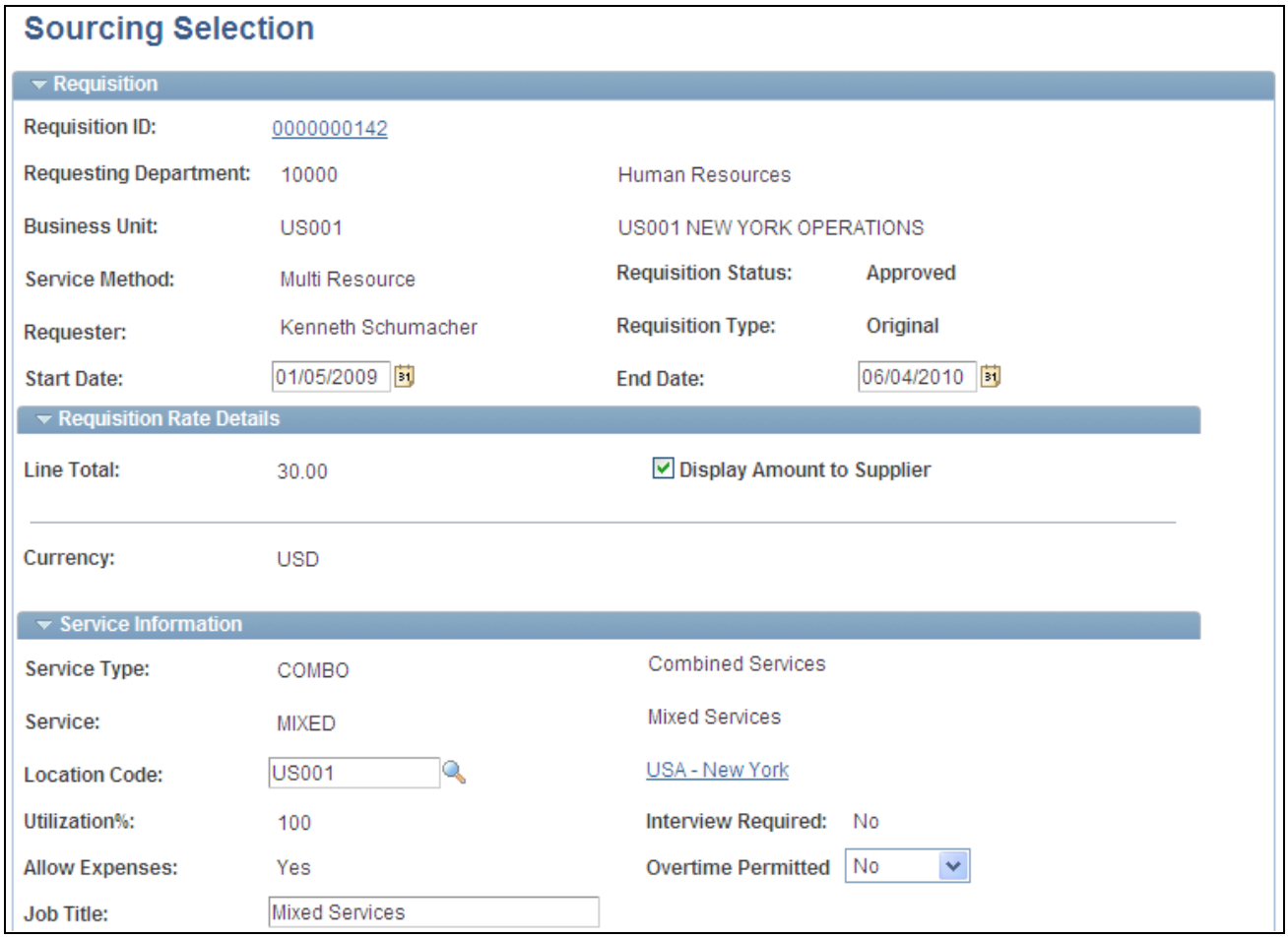
Link

Click the link that corresponds to the requisition ID that you want to source using the worklist filter *sPro Approved Requisition* value. Click this link to access the Sourcing Selection page, where you can source the requisition.

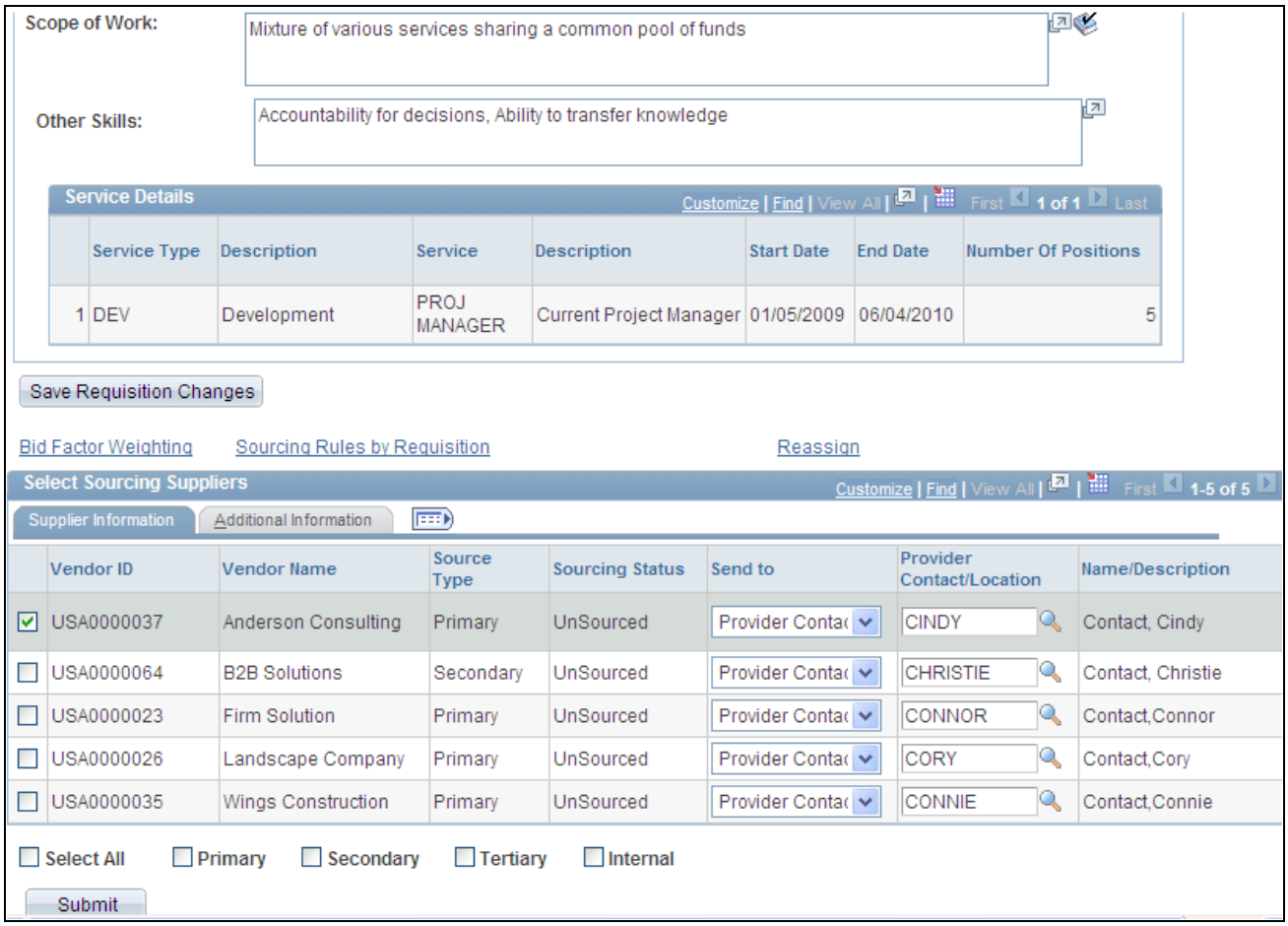
Note. When an extended requisition is approved, the service coordinator receives a worklist entry with a column indicating that the requisition is extended and approved.

Sourcing Requisitions

Access the Sourcing Selection page (click the Sourcing Selection button on the Manage Sourcing page).



Sourcing Selection page (1 of 2)



Sourcing Selection page (2 of 2)

Use this page to review and source the requisition request. When you click a service, you access the Job Summary page for the service. Fields on the Sourcing Selection page vary based on the requisition service method.

Note. The service coordinator can edit many of the requisition fields from this page prior to sourcing the requisition to suppliers. After you update the fields , click the Save Requisition Changes button to save the requisition changes.

Note. A service provider/coordinator cannot source a requisition to herself on the Sourcing Selection page.

Note. If you have the Managed Service Provider Installation check box selected on the Installations Options page, MSP rate information appears on the Sourcing Selection page.

Save Requisition Changes Click to save the changes that you make to the requisition.

Bid Factor Weighting Click to access the Bid Factor Weighting page, where you can view bid factor information and attributes.

See Chapter 15, "Managing PeopleSoft Services Procurement Sourcing," Adjusting Bid Factor Weightings, page 352.

Sourcing Rules by Requisition

Click to access the Sourcing Rules by Requisition Line page, where you can update the rate preference, score, and minimum and maximum values.

See Chapter 15, "Managing PeopleSoft Services Procurement Sourcing," Managing Sourcing Rules by Requisition Line, page 352.

Activities By Requisition

Click to access the Activities by Requisition page, where you can view activities for a requisition line. You can also view comments for the line.

See Chapter 15, "Managing PeopleSoft Services Procurement Sourcing," Viewing Activities Defined for a Requisition, page 352.

Reassign

Click to access the Reassign Requisition Line page, where you can select another service provider for the requisition line. After you reassign the requisition line, the system assigns the line to the new service coordinator and removes it from your work queue.

See Chapter 15, "Managing PeopleSoft Services Procurement Sourcing," Reassigning Requisition Lines, page 355.

Requisition

The Requisition group box provides basic information about the requisition. Click the Requisition ID link to access the Requisition Line Job Summary page, where you can view and maintain requisition information. You can also change the requisition start and end dates in this section.

Requisition Rate Details

This group box provides information about the requisition rate, including the requisition line total and currency. You can also select the Display Amount to Supplier check box to make the information visible to the supplier.

See Chapter 15, "Managing PeopleSoft Services Procurement Sourcing," Defining Requisition Rate Details, page 353.

Service Information

This group box provides details about candidate requirements and multiple-resource information for related individual services when you select to source a multi-resource service.

Service Method

Indicates whether the requisition is a *Multi Resource, Resource,* or *Deliverable* service method.

Service Type

Displays the service type after you add or select a service for this requisition.

Service

Displays the service. Click the link to access the Job Summary page for the service.

Qty (quantity)	Displays the number of positions that you want to include in this requisition. You can change this information by clicking the service link. The field is only available for resource services where you are using a deliverable or multi-resource service.
Location Code	Displays the business unit location used for this service. Click the location link to view the location address associated to the location.
Start Date and**End Date**	Displays the start and end date for the service.
Total Position	Displays the number of positions for this requisition.
Filled Position	Displays the number of positions that have been filled for this requisition.
Utilization% (utilization percentage)	Displays the percentage of time that the candidate will spend during the engagement. For example, if the candidate typically works a half-day, the utilization is 50 percent. If the candidate typically works 3 days per week, the utilization is 60 percent.
Interview Required	Indicates if an interview is required with the candidate to fill this service.
Allow Expenses	Indicates if expenses are allowed for this service.
Overtime Permitted	Indicates if this service permits overtime.
Job Title	Displays the job title used to define the job.
Track Resource(s)	Indicates if the service provider resources are to be included on a deliverables-based requisition.
Scope of Work	Displays the information entered to describe the job.
Other Skills	Displays any other skills that a candidate would need to perform this service.
Duration	Displays the length of time for this service.
Rate	Displays the rate at which this service is paid.

Note. The Change Tracking feature setup determines whether changes to requisition data is allowed after approval, and if so whether the changes are tracked.

Service Details

This grid provides information about multi-resource service requisitions. The grid is display-only.

Select Sourcing Suppliers: Supplier Information

You use the Select Sourcing Suppliers: Supplier Information tab to select the vendor to which you want to source a requisition line. You can select an individual vendor or select all vendors for sourcing the requisition line. You can also select to source the requisition by source type (primary, secondary, tertiary, or internal vendors). You can select one source type to which to source the requisition line by selecting the corresponding check box.

After you define the source type or manually select individual suppliers for sourcing, click the Submit button to source the requisition line. After the system sources the requisition line, it updates the Sourcing Status field to *Sourced.*

Vendor ID	Displays the vendor. To source this requisition line to the vendor, select the check box and click the Submit button.
Vendor Name	Displays the vendor name.
Source Type	Indicates whether the supplier is *Internal*, *Primary*, *Secondary*, or *Tertiary.*
Sourcing Status	Displays the sourcing status, *Sourced* or *Unsourced.*
Send To	Select to source the requisition request to either the supplier location or a specific contact at the supplier location. Values include *Location* and *Provider Contact.*
Provider Contact/Location	Displays the provider contact name or the location, depending on the selection for the *send to* field.
Name/Description	Displays the name of the service provider or description of the location.
Select All	Click to select all the vendors listed on the Supplier Information tab.
Primary,Secondary,Tertiary, and **Internal**	Select a check box to indicate that you want to select all vendors that are within the a supplier classification. For example, if you want to source requisitions to a secondary supplier, you would select the Secondary check box. The system automatically selects all suppliers that are defined as secondary suppliers.

Select Sourcing Suppliers: Additional Information

Notification Method	Select *Email and Worklist* or *Worklist Only* to specify the supplier notification method.
Filled Position	The number of people already selected to fill positions for the service. This field is incremented each time a position is filled through bid management and decremented each time a related work order is canceled.

Selection Level

View the vendor selection level values. This value reflects the method that is used to include a vendor in the sourcing selection list.

Values for resource-based requisitions are *Region Service Type, Service Type, Region, Preferred,* and *Supplier Network.*

Values for deliverable-based and multi-resource requisitions are *Region Service, Service, Region, Preferred,* or *Supplier Network.*

Note. The selection level indicates the level that is used when you select a supplier.

Contract

Indicates whether the supplier has a contract.

Note. This field appears only if service contracts are enabled on the PeopleSoft Services Procurement Installation Options page, and if *Include all Contract Suppliers* is selected on the PeopleSoft Services Procurement business unit page.

Score

Displays the supplier score based on the established rules that include supplier performance metrics, level codes, weight, and performance-level ranges.

Max Submittal Limit/Position (maximum submittal limit and position)

Enter the maximum number of candidates that a supplier can submit per position for the requisition line. For example, if the requisition line has 5 positions and the maximum submittal limit is set to 3, the supplier may submit up to 15 candidates.

Click the Score Analysis button to view the analyzed score.

Service Coordinator Edits

If the requisition has not been sourced, service coordinators can edit the Start Date, End Date, and Location fields. The start date can be moved forward, but not backward. When you change the start date, the system automatically adjusts the end date by the original duration; you can change the end date, but you will be warned if the new duration is shorter than the original duration. The start date, end date, and location fields appear as view only when the requisition is sourced.

Regardless of whether the requisition has been sourced, the service coordinator can edit the job description, competencies, and scope of work.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Suppliers by Region, page 115

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining the Supplier Network Setup, page 113

Viewing Activities Defined for a Requisition

Access the Activities by Requisition page (click the Activities by Requisition link on the Sourcing Selection page) for deliverable services.

Activities added to the requisition can be added to the work order. The service provider contact can record progress against these activities.

Select a service activity and click the Save button.

Note. You can add activities only if the service on the requisition has *Allow add activities* selected and the requisition is for a deliverables-based service. You cannot add activities after the requisition has been sourced.

Adjusting Bid Factor Weightings

Access the Bid Factor Weighting page (click the Bid Factors Weighting link on the Sourcing Selection page).

Comment Text	View the bid factors that are associated with a specific requisition.
Weighting	Adjust the weightings of each bid factor to determine its level of importance. For example, suppose that if the candidate start date is the most important qualification, then you would weigh that bid factor more heavily than others. **Note.** The total of all bid factor weightings must equal 100 percent.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Creating Bid Factors, page 121

Managing Sourcing Rules by Requisition Line

Access the Sourcing Rules by Requisition Line page (click the Sourcing Rules by Requisitions link on the Sourcing Selection page).

Sourcing Rules by Requisition Line page

If the sourcing engine returns too many rows, you can access this page to refine the search. You can access this page only if you have the permissions on the service coordinator defaults.

Preference Rule Select Region to indicate that selecting suppliers within the same region is more important, or select Service/Service Type to indicate that selecting suppliers that provide the right service or service type is more important.

Score Indicate the minimum score that a supplier must have to be selected for sourcing.

Minimum Enter the minimum number of suppliers to find using the sourcing rules.

Maximum Enter the maximum number of suppliers to find using the sourcing rules.

Include All Contract Suppliers Select to include all suppliers that have an existing contract for the desired role.

Note. This check box is available only for resource-based requisitions.

Save Click to save changes. When you click the Sourcing Selection Page link, the Sourcing engine runs again using the new parameters.

Defining Requisition Rate Details

Access the Requisition Rate Details page (click the Define Requisition Rates button on the Manage Sourcing page).

This page provides requisition and service details, service information, and candidate requirements and duration information. The page is available to the service coordinator when the business unit Requester Access to Rates field value is set as *No Access* or *View Only*.

Requisition Rate Details

Allow Expenses Select to allow expenses to be included in the requisition. The check box appears selected or deselected based on its setting on the Create Requisition page. The check box is available if the SP Expenses Enabled check box is selected on the Services Procurement Installation Options page.

Labor Amount Displays the total labor amount calculation based on the rate, unit of measure, and service days specified. You can override the amount.

Expense Amount Displays the total expense amount for the requisition. The system calculates the value using the expense rate and unit of measure, but you can override the value.

Currency Displays the monetary currency in which the system measures the expense and labor amounts.

Line Total Displays the total for labor and expense for all positions for the duration of the requisition.

Rate Definition

When the requester does not have access to the rates, the system routes the requisition to the service coordinator to define the rates.

The service coordinator should define the rates before routing the requisition back to the requester. For multi-resource services, this includes both the top-level parent multi-resource service and the related individual child services. Click the Service link to define the rates of individual services. Service coordinators cannot add or delete services from this page.

Service Type Displays the service types for this requisition line. Service types are a way of grouping roles or services.

Service Displays the services associated with the requisition line. You can click the link to access the Service page. The page displays resourced-based service information for which you can define the rates for the service.

Qty (quantity) Displays the number of positions required for the requisition line. Multi-resource services can have multiple services for a requisition line.

Start Date and**End Date** Displays the service provider's earliest start date and end date.

Duration Displays the number of days between the start and end dates.

Add Individual Services Click to add a service to this multi-resource service. This button appears if no services are associated with the top-line requisition.

Reassigning Requisition Lines

Access the Reassign Requisition Line page (click the Reassign link on the Sourcing Selection page).

Service Coordinator	Enter a service coordinator to whom you want to reassign the lines.

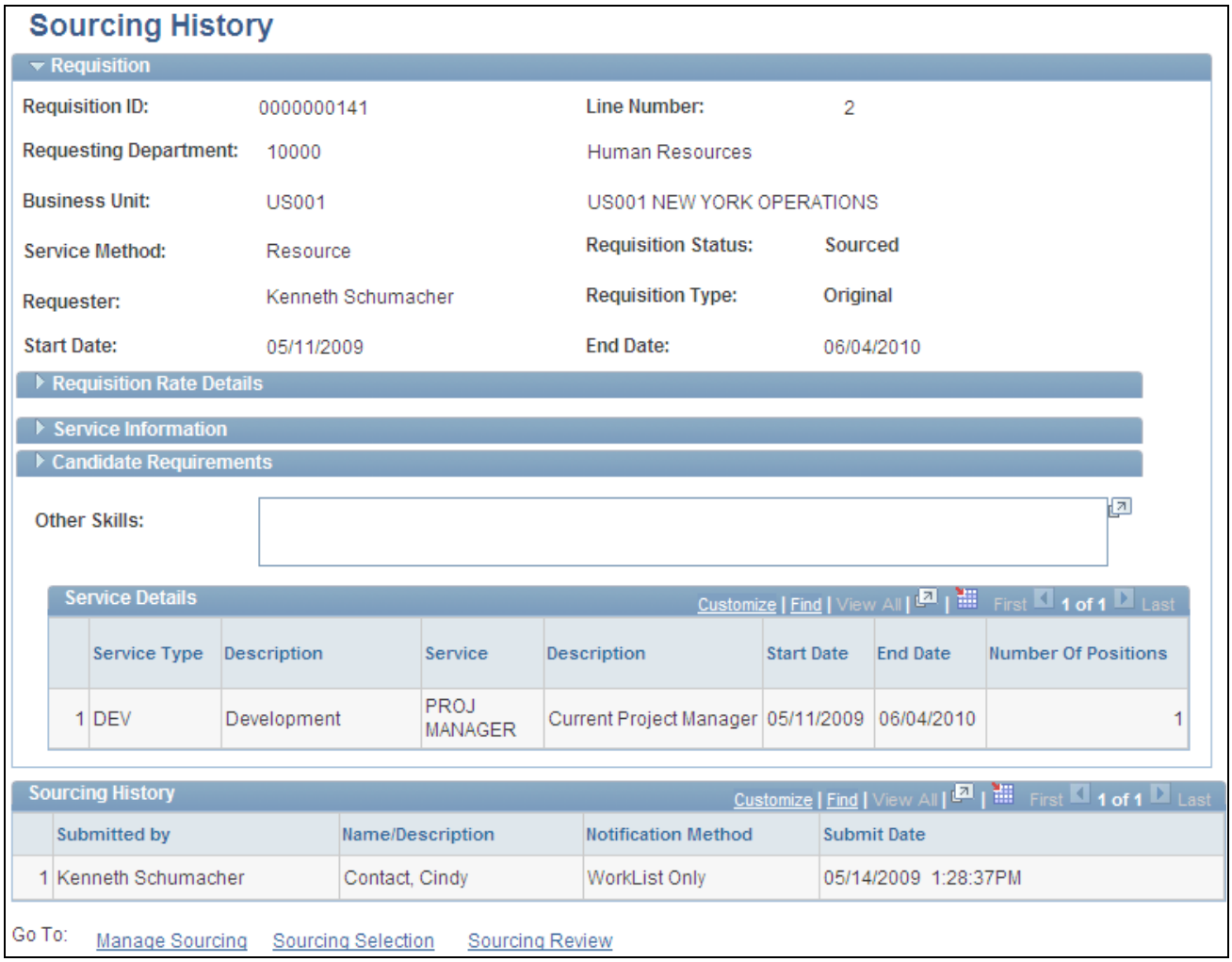
Using the Sourcing Review

Access the Sourcing Review page (click the Sourcing Review link on the Sourcing Selection page).

No. of Times Sent (number of times sent)	View the number of times this vendor has been sourced for this requisition line.
No. of Submittals (number of submittals)	View the number of bids from the supplier.

Viewing Sourcing History

Access the Sourcing History page (click the Sourcing History button on the Sourcing Review page).



Sourcing History page

The sourcing history includes the service coordinator who submitted the requisition to be sourced, the vendor contact, the notification method, and the submit date.

Managing Work Order Sourcing

This section discusses how to:

- View work orders for sourcing.
- Manage work order sourcing review.
- View work order sourcing history.

See Also

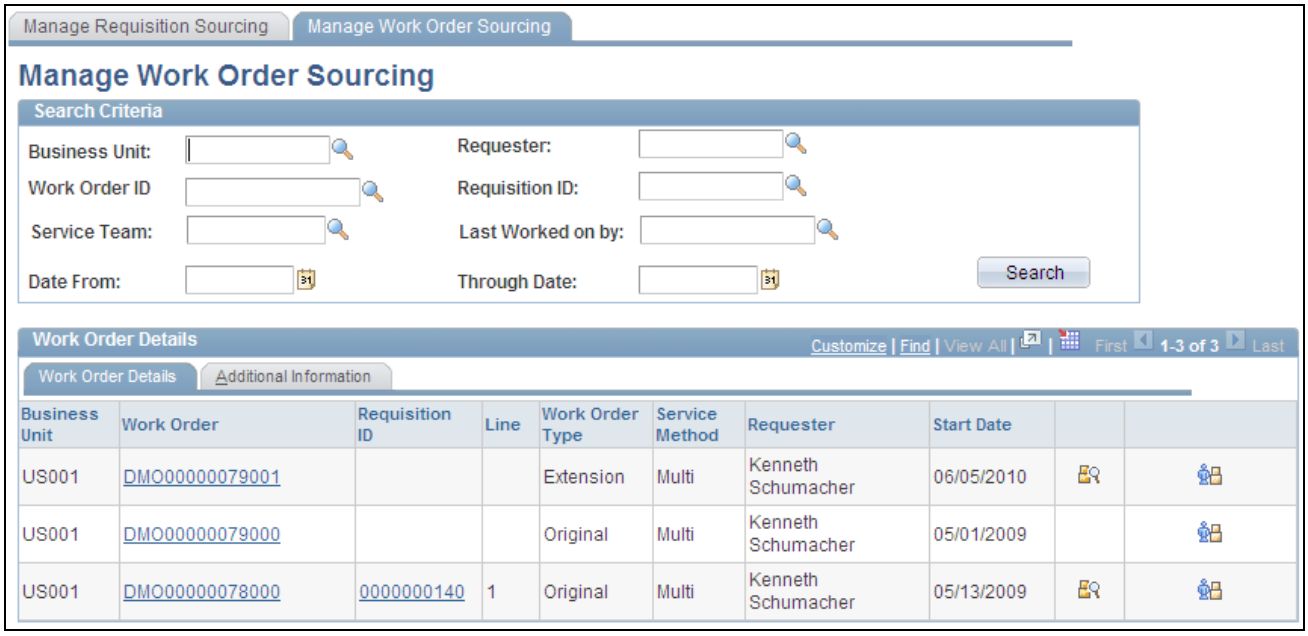
Chapter 18, "Managing Work Orders," Creating and Managing Work Orders, page 419

Pages Used to Manage Work Order Sourcing

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Work Order Sourcing	SPF_SRC_MNG_WO_PG	Services Procurement, Review and Source Select the Manage Work Order Sourcing tab on the Manage Sourcing page.	View work orders for sourcing.
Details	SPF_WORDER_DETAIL	Click the Work Order link on the Manage Work Order Sourcing page.	View details about the work order.
Work Order Service Sourcing Select	SPF_SOURCE_SLT_WO	Click the Work Order Sourcing Select button on the Manage Services Work Order page for a resource- or deliverables-based work order.	Source work orders.
Multi Resource Sourcing Select	SPF_SOURCE_SLT_MWO	• Click the Work Order Sourcing Select button on the Manage Services Work Order page for a multi-resource work order. • Click the Multi Resource Sourcing Select link on the Work Order Sourcing Review page.	Source multi-resource work orders.
Manage Work Order Sourcing Review	SPF_SOURCE_REVIEW	Click the Work Order Sourcing Review link on the Manage Services Work Order page.	Review work order sourcing details.
Work Order History	SPF_SOURCE_HIS_WO	Click the Work Order Sourcing History button on the Manage Work Order Sourcing Review page.	View work order sourcing history that was sourced to suppliers.
Supplier Replacement Sourcing Review	SPF_SOUR_RVW_WO_SP	Services Procurement Review Replacement, Submit Bids (must be logged in as a supplier)	Review incoming replacements and submit candidates.

Viewing Work Orders for Sourcing

Access the Work Order Sourcing page (Services Procurement, Review and Source, and select the Manage Work Order Sourcing tab on the Manage Sourcing page).



Manage Work Order Sourcing page

When you access the Manage Work Order Sourcing page, the system initially displays all work orders for the user. To limit the number of work orders, enter search criteria. Search fields for work orders are similar to those used for searching for requisitions to source. Select a specific work order in the Work Order ID field on which to base a search.

Note. After the top-level parent service of a multi-resource requisition line is filled and the related work order is approved, service coordinators can source the service lines one or more at a time using work order sourcing. Sourcing parameters such as notifications, submit limit, and so on are supplied from the top-level line. Service coordinators can still access and update individual services.

When a top-level parent multi-resource service has been filled and the related work order has been approved, service coordinators can then source one or more of the individual child service lines. Some sourcing parameters, such as the notification or the maximum submission limit, are extracted from the top-level parent service.

See Chapter 15, "Managing PeopleSoft Services Procurement Sourcing," Sourcing Requisitions, page 339.

The Work Order Details tab provides basic information about the work order, such as the work order type and service method.

Work Order Click to access work order details and cost information.

Requisition ID Click to access details about the requisition that was used to create the work order.

Line	Displays the line number of the requisition to which the work order applies.
Work Order Type	Displays the type of work order. Work order types determine the logistical task group and logistical tasks that are associated with the work order. Values include *Original*, *Extension*, *Replaced*, and *Reassigned.*
Service Method	Displays the method used to create the work order. Methods include: *Deliverable:* Services that are generally performed by an entire work force, such as a work order for an entire project, not just the hours worked by a single service provider. *Multi Resource:* Services that support multiple, unique services and service providers *Resource:* Services of an individual service provider. These may also be child services for a multi-resource parent service.
Requester	Displays the user who submitted the requisition.
Start Date	Displays when the work order begins.
Work Order Sourcing Review	Click to access the Work Order Sourcing Review page.
Work Order Sourcing Select	Click to access the Sourcing Select page for the work order. Depending on the service method, the page name can vary.

Sourcing Work Orders

Access the Work Order Service Sourcing Select page (click the Work Order Sourcing Select button on the Manage Services Work Order page for a resource- or deliverables-based work order).

Work Order Service Sourcing Select

Work Order

Work Order	DMO00000079001	Seq Number:	1
Requesting Department:	10000	Human Resources	
Business Unit:	US001	US001 NEW YORK OPERATIONS	
Requester:	VP1	Kenneth Schumacher	
Source Status:	Sourced		
Start Date:	06/05/2010	End Date:	07/05/2010

Work Order Rate Details

Pay Rate:	45.00		
Fixed Cost:	0.00		
Vendor Markup:	0.00		
3rd Party Markup:	0.00		
Rate:	45.00	☐ Display Rate to Supplier	
Currency Code:	USD	UOM:	MHR

Work Order Service Sourcing Select page (1 of 3)

Service Information

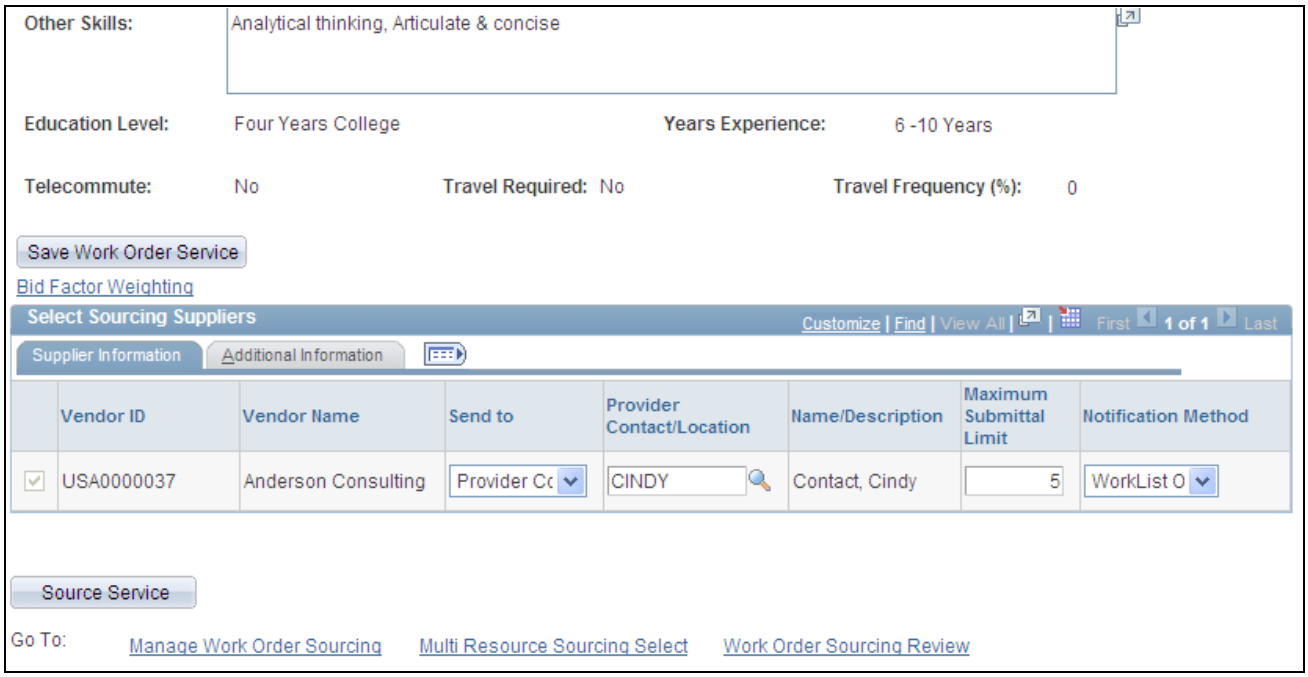
Service Type:	IT	Information Technology	
Service:	PROJ MANAGER	Current Project Manager	
Location Code:	US001	USA - New York	
Number Of Positions:	4	Filled Positions:	0
Utilization%:	100	Interview Required:	No
Allow Expenses:	Yes	Overtime Permitted:	No
Job Title:	Project Manager		
Scope of Work:	The Project Manager effectively manages the project from staffing to completion.		

Candidate Requirements

Competency Details Customize | Find | View All | First 1-2 of 2 Last

	*Competency	Description	Proficiency	Years Experience	Action
1	0101	Analytical thinking	3-Good		No Action
2	0153	Articulate & concise	3-Good		No Action

Work Order Service Sourcing Select page (2 of 3)

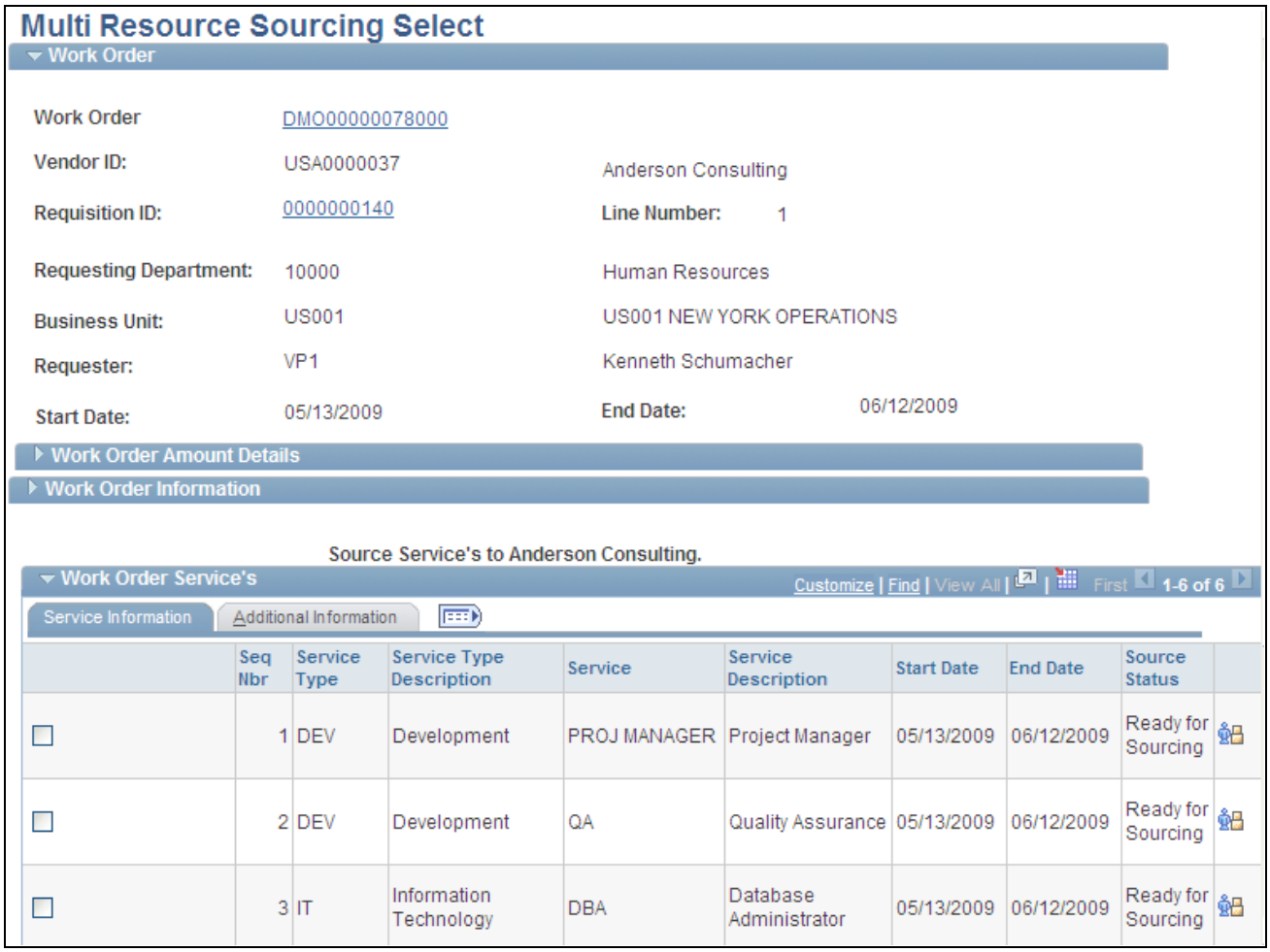


Work Order Service Sourcing Select page (3 of 3)

Use this page to select work orders for sourcing. You can also update

Sourcing Multi-Resource Work Orders

Access the Multi Resource Sourcing Select page (click the Work Order Sourcing Select button on the Manage Services Work Order page).



Multi Resource Sourcing Select page

The multi-resource service method provides a hierarchical relationship between a fixed-amount, parent-level service work order and multiple resource services at a child level. This enables multiple, unique service providers to be sourced to individual work orders, filling all the required services for a multiple assignment engagement.

The top portion of the Multi Resource Sourcing Select page displays the parent work order while the Work Order Services section displays child-level work orders that make up the parent work order.

Work Order

Use this section to view work order details. You can also access the work order Details page and from that page access lower-level work orders using the Work Order Individual Service Details page. If the parent work order is associated to a requisition, then you can also access details about the requisition.

Work Order Amount Details

This section provides the amount of the work order and its currency code.

Work Order Information

This section provides various work order information, such as the service type, location, job title, and whether expenses are allowed.

Work Order Services: Service Information

The Service Information tab displays the lower-level work orders for the parent work order. You can use the tab to source any individual service work order that is in a status of Ready for Sourcing. If a work order has already been source, it's source status is Sourced.

Work Order Service Sourcing	Click to access the Work Order Service Sourcing Select page for the work order. Depending on the service method, the page name can vary.
Select/Deselect All	Select to indicate that you either want to select all services work order for sourcing or deselect the work orders.
Source Services	Click to source the selected services to the defined supplier. When you source a work order, the system updates the work order status to Sourced.

Work Order Services: Additional Information

The Service Information tab displays the lower-level work orders for the parent work order. You can use the tab to source any individual service work order that is in a status of Ready for Sourcing. If a work order has already been source, it's source status is Sourced.

Labor Amount	Displays the total amount of the work order.
Select/Deselect All	Select to indicate that you either want to select all services work order for sourcing or deselect the work orders.

Reviewing Work Order Sourcing Details

Access the Manage Work Order Sourcing Review page (click the Work Order Sourcing Review button on the Manage Services Work Order page).

Work Order Sourcing Review page

Use this page to review sourcing information for work orders. You can access the work order or the requisition used to create the work order using page links.

See Chapter 18, "Managing Work Orders," Creating and Managing Work Orders, page 419.

Note. If you select the mandatory sourcing option on the Services Procurement Business Unit page, then service coordinators must use this sourcing process to establish work order replacements for service providers.

Seq Nbr (sequence number)	Displays the system-assigned sequence number. The number determines the processing order for sourcing.
Service Type and **Service Type Description**	Displays the service type. Service types are a way of grouping roles or services. A description also appears with the service type.
Name/Description	Displays the work order service provider.
Notify By	Displays the notification method that has been defined for the work order.
Creation Date	Displays when the work order was created.

Work Order Sourcing History Click to access the Work Order Service Sourcing History page.

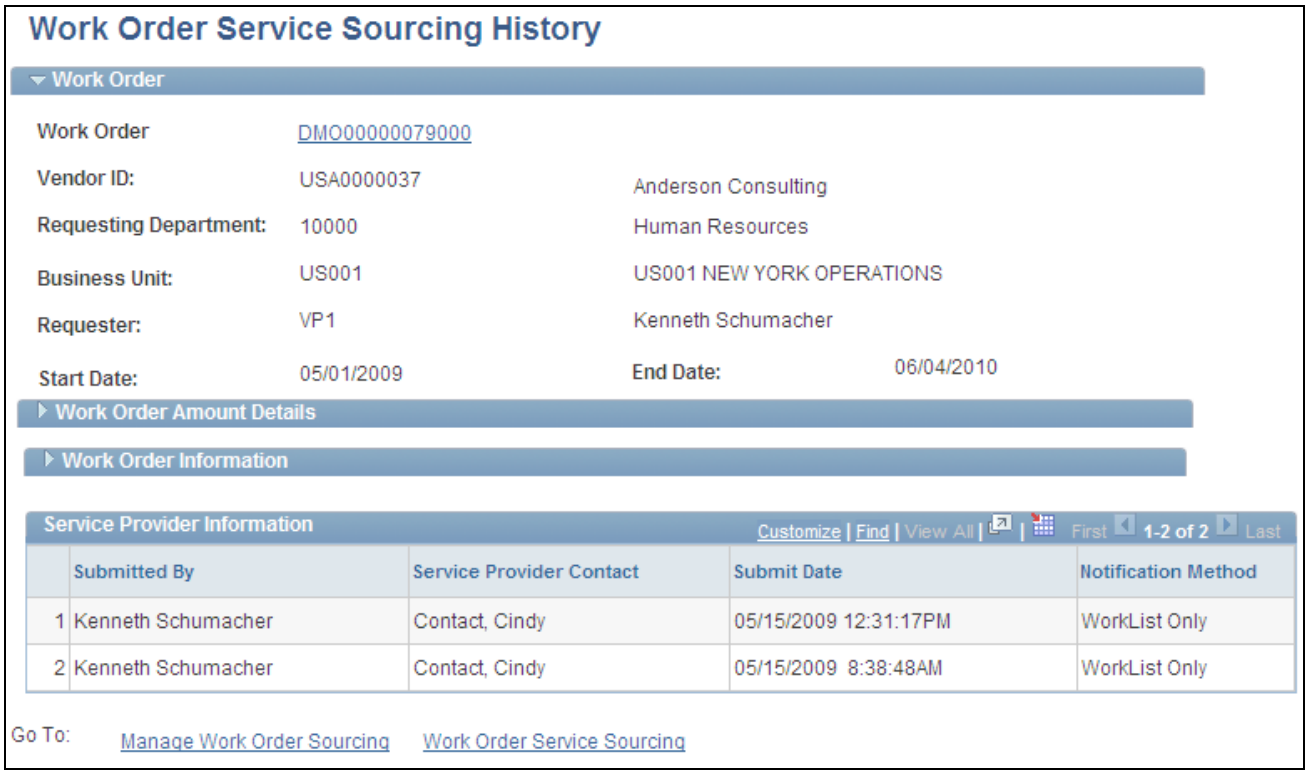
Go To

Manage Work Order Sourcing Click to return to the Manage Work Order Sourcing page, where you can select another work order to view or source.

Multi Resource Sourcing Select Click to access the Multi Resource Sourcing Select page. You use the page to source multi-resource work orders.

Viewing Work Order Service Sourcing History

Access the Work Order Service Sourcing History page (click the Work Order Sourcing History button on the Work Order Sourcing Review page).



Work Order Sourcing History page

Use this page to view history for work orders that have been sourced. If the work order is a multi-resource service, the system displays both the work order top-level parent service and lower-level individual child services.

The history includes who submitted the work order, the service provider contact, the work order submission date, and the notification method.

See Also

Chapter 18, "Managing Work Orders," Creating and Managing Work Orders, page 419

Chapter 16

Submitting and Managing Bids

This chapter provides an overview of the requisition and work order bidding process for suppliers and discusses how to:

- View and maintain services work orders.
- View sourced requisition and work order information.
- Submit bids.
- Maintain bids and bid responses.
- Manage service providers.

Understanding the Requisition and Work Order Bidding Process

In PeopleSoft Services Procurement, the requisition and work order bidding process enables suppliers to collaborate and communicate with service coordinators to match qualified bids successfully with open service requisitions, work orders, and multi-resource requisitions and work orders.

Requisitions and work orders can be resource-based, deliverables-based, or multi-resource. If a requisition is resource-based, the supplier submits a candidate to fill the requisition. If the requisition is deliverables-based, the supplier submits a proposal for filling the requisition.

When requisitions are for multi-resource services, suppliers can submit proposals to fill the service and then subsequently submit individual service providers to fill multiple individual services. After the requisition is filled, service providers can report time against individual work orders associated to the overall parent work order.

PeopleSoft Services Procurement enables suppliers to:

- Review sourced requisitions and work orders.
- Submit and maintain bids for resources, deliverable, or multi resource services.
- Withdraw a bid before service coordinators and requesters respond to the bid.
- Review incoming, draft, and outgoing bid information.
- View bid history.
- View interview schedules.
- Manage service providers.

Here is the basic task flow of the requisition and work order bidding process for suppliers:

1. Use the Submit Bids component to review requisitions and work orders that have been sourced to the supplier for consideration.

   Using the component, you can access the Requisition Sourcing Review and Work Order Sourcing Review pages to view bids.

2. Use the Submit Bid and Multi Resource Submit Bid pages to submit bids that meet requisition and work order requirements.

3. As the supplier, you submit a bid to the service coordinator for review and after receiving a response, you use the Maintain Bids page to view the bid response from the service coordinator.

4. Use the Supplier Bid Response page to respond to service coordinators about requisitions and work orders.

   Note. Negotiation between the supplier and service coordinator is typically an ongoing process. After the service coordinator selects the action *Fill Bid*, a break in communication occurs. This action officially ends the bid process between the service coordinator and the supplier.

5. Access the Service Provider Roster page to manage service provider information.

See Also

"PeopleSoft Services Procurement Preface," page xxiii

Prerequisites

A requisition or work order must be sourced to the supplier before a bid can be submitted.

Viewing and Maintaining Services Work Orders

This section discusses how to:

- View services work orders
- Maintain multi-resource work orders.
- Track work order resources.

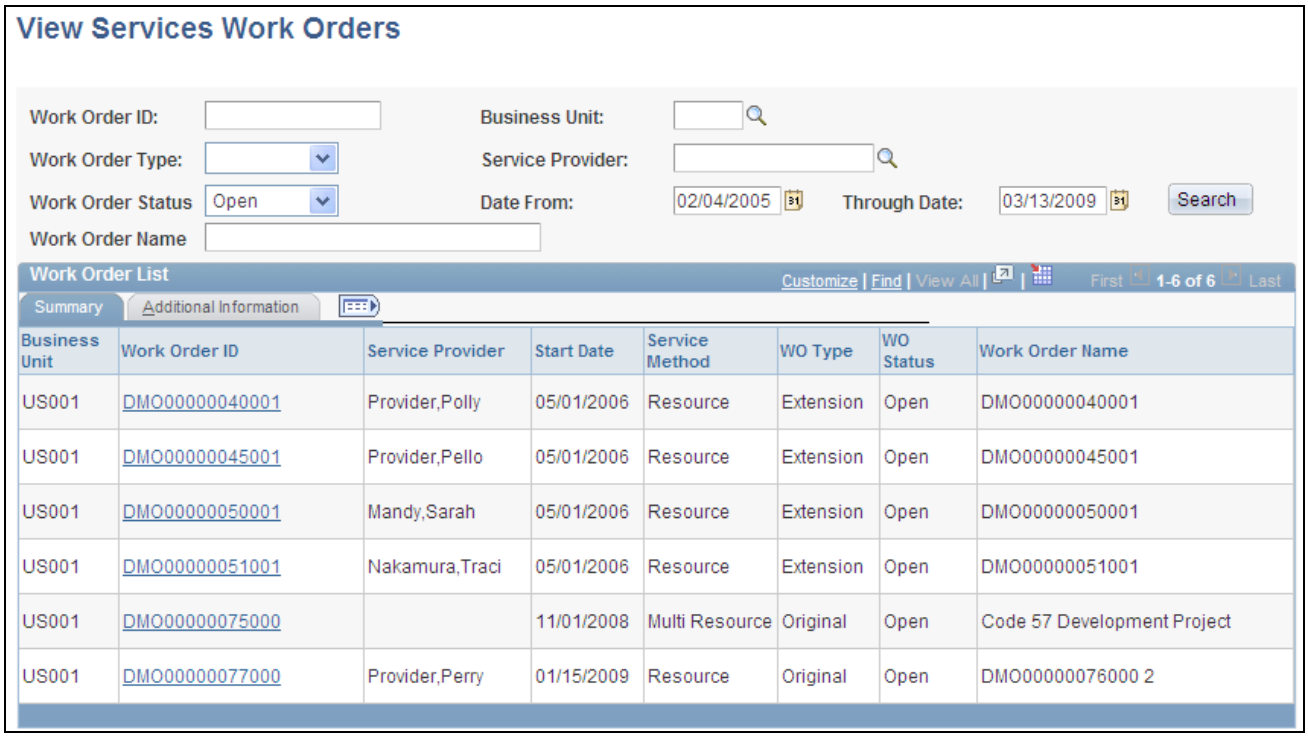
Pages Used to View and Maintain Services Work Orders

Page Name	*Definition Name*	*Navigation*	*Usage*
View Services Work Orders	SPF_WO_SUP_ROSTER	Services Procurement, View Services Work Orders	View service work orders.

Page Name	*Definition Name*	*Navigation*	*Usage*
Track Resources	SPF_WO_TRK_RSRC	Click the Work Order ID link on the Multi Resource Work Orders page.	Track resources.

Viewing Services Work Orders

Access the View Services Work Orders page (Services Procurement, View Services Work Orders).



View Services Work Orders page

Suppliers use this page to search for work orders that have been filled by them. The system provides a listing of work orders after you define search criteria and click the Search button.

Work Order ID Click to view details and cost information about the selected work order.

Service Provider Displays the service provider who is going to provide the service.

Start Date Displays when the service is scheduled to start.

Service Method Displays the method used to create the work order. Methods include:

Deliverable: Services that are generally performed by an entire work force, such as a work order for an entire project, not just the hours worked by a single service provider.

Resource: Work order services for an individual service provider.

Work Order Type Indicates the type of work order. Values include *Original*, *Extension*, *Replaced*, and *Reassigned*.

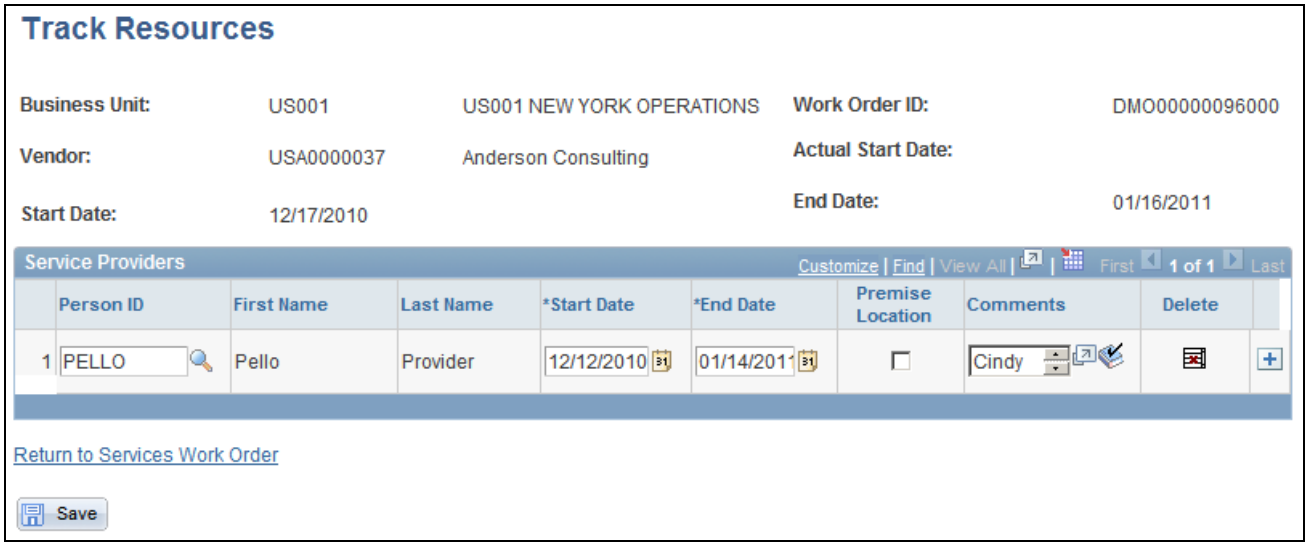
Work Order Statusand **Work Order Name** Displays the life-cycle stage for the work order. For example, Open, Submitted, and Closed are stages. The name assigned to the work order also appears.

Additional Information

Select the Additional Information tab to access more details about the work order. These details include whether the work order is a subline, it's creation date, and the purchase order status if applicable.

Tracking Work Order Resources

Access the Track Resources page (click the Track Resources button on the View Services Work Orders page).



Track Resources page

Supplier users use this page to view, reassign, remove, or add service providers for the selected work order.

Person ID Displays a list of service providers for the work order that you selected. You can add more service providers or edit the providers already listed.

First Name and **Last Name** Identify the name of the service provider.

Start Date and **End Date** Displays the scheduled start and end dates for the service provider to perform the work order services. You can change the dates as needed. The dates must be within the date range of the work order. For example, you cannot select an end date that is later than the work order end date.

Premise Location Select to specify that the service provider provides the service at the vendor location.

 Click to enter or update comments about the service provider using a modal window. The system saves the comments when you click the OK button at the bottom of the Comments page. You can scroll up and down the page to view and enter comments and access the OK button.

 Click the View Expanded button to view and update comments entered for the service provider. After you view or update the comments, click the OK button to return to this page.

 Click the Delete button to remove the corresponding service provider from the work order. The deletion is immediate.

Add Service Providers Click to add or maintain service provider information.

See Chapter 16, "Submitting and Managing Bids," Managing Service Providers, page 391.

Viewing Sourced Requisition and Work Order Information

This section provides a list of common elements and discusses how to:

- Review sourced requisitions for suppliers.
- Review sourced work orders for suppliers.

Common Elements Used in This Section

Assign Status Select a value on which to search for requisitions or work orders. Values include:

Assigned: Select to search for requisitions or work orders that have been assigned to a service provider.

Unassigned: Select to search for requisitions or work orders that are not assigned to a service provider.

Available Positions The number of positions not yet filled for a requisition line or work order.

Filled Position The number of people already selected from this supplier to fill positions for the service.

Note. This field is incremented each time a position is filled through bid management. The value is decremented each time a related requisition or work order is canceled, with the exception of child work orders for a multi resource service.

Last Worked on by	Select a person ID on which to base a search for requisitions or work orders that were last worked on by that person.
Line Number	Displays the requisition line number. The system uses the line number to identify specific service requirements in a requisition. This field is available for requisitions and for work orders when they have had requisitions assigned to them.
Maximum Submittal Limit	Displays the number of times that a supplier can submit a candidate for a position for the requisition line or a work order sequence. For example, if the requisition line has 5 positions and the maximum submittal limit is set to 3, the supplier can submit up to 15 candidates.
Number of Positions	Enter the number of available positions needed to fill the requisition or work order service request.
Number of Times Submitted	Displays the number of times that this service provider has been submitted
Project Role	Select a project role on which to base a search for requisitions or work orders. Project roles determine the type of activities that a user can perform.
Requisition ID	Select a specific requisition on which to base the search when you are using the Requisition Sourcing Review page to search for requisitions. If you are using the Work Order Sourcing Review page to search for work orders, you can also select a requisition ID on which to search. The system returns the requisition as long as it's associated with a work order.
Requisition Status	Select a status on which to base the search for requisitions. The system returns only those requisitions that are in the status you select. Values include: *Closed:* Select to view only requisitions that have been closed and are no longer available for bidding. *Filled:* Select to view only requisitions that have already been filled. *Pending:* Select to view only requisitions that are pending. *Sourced:* Select to view only requisitions that have already been sourced to the supplier. These requisitions are available for bidding.
Service Coordinator	Select a service coordinator on which to base the search for requisitions or work orders. The list of values contains those service coordinators who have sourced requisitions or work orders to the service provider contact.

Service Method

Select a service method on which to search for requisitions or work orders. Methods include:

Deliverable: Services that are generally performed by an entire work force, such as a work order for an entire project, not just the hours worked by a single service provider.

Multi Resource: Requisition and work order services that support multiple, unique services and service providers.

Resource: Requisition and work order services of an individual service provider.

Source Date From and **Through Source Date**

Select a range of dates to include in the requisition or work order search. The source date is when the service was sourced to the service provider contact.

Work Order ID

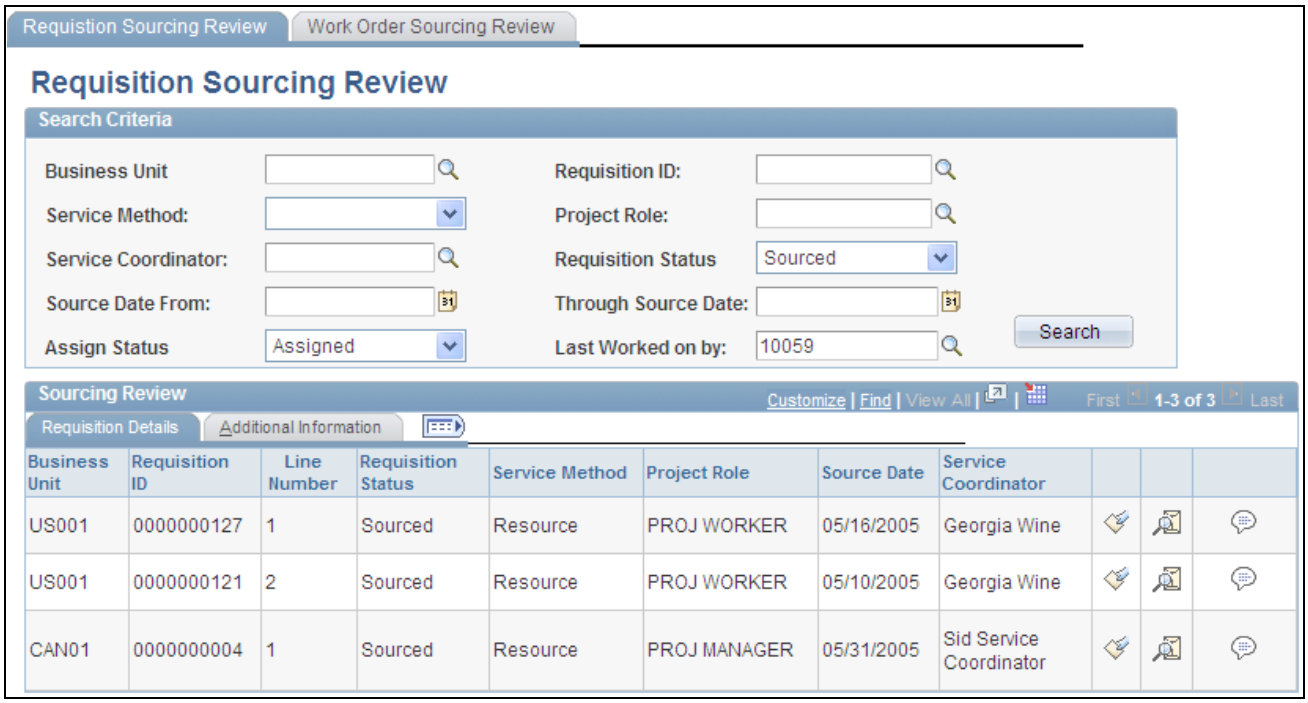
Select a specific work order on which to base a search for work orders. You can also limit the search to specific requisitions associated to the work order.

Pages Used to View Sourced Requisition and Work Order Information

Page Name	*Definition Name*	*Navigation*	*Usage*
Requisition Sourcing Review	SPF_SOUR_REVIEW_SP	Services Procurement, Submit Bids	Review requisitions sourced to the supplier.
Work Order Sourcing Review	SPF_SOUR_RVW_WO_SP	Select the Work Order Sourcing Review tab on the Requisition Sourcing Review page.	Review work orders sourced to the supplier.

Reviewing Sourced Requisitions for Suppliers

Access the Requisition Sourcing Review page (Services Procurement, Submit Bids).



Requisition Sourcing Review page

Use the Search Criteria group box at the top of the page to enter specific search criteria for requisitions that have been sourced to the supplier. You can search by business unit, requisition ID, service coordinator, as well as various other search criteria. After you enter the specific search criteria, click the Search button to view the results.

Note. This page displays only the main top-line (parent) requisition line if you are viewing a multi-resource requisition. Information about the related child requisition lines is available on the bid page when you click the Submit Bid button.

Use the Sourcing Review section in the bottom portion of the page to view requisitions that were sourced to suppliers. Select the Additional Information tab to review more details about the requisition. These details include the number of positions, positions available, and those filled. The details also include the number of times that a bid has been submitted against the requisition and the maximum number of bids allowed for the requisition.

Click the Submit Bid button to access the Submit Bid page, where you can complete candidate information and submit the bid to the service coordinator for consideration.

Click the View History button to access the Sourcing History page, where you can review the sourcing history of the requisition.

Click to access the Comments page, where you can review comments associated with the requisition.

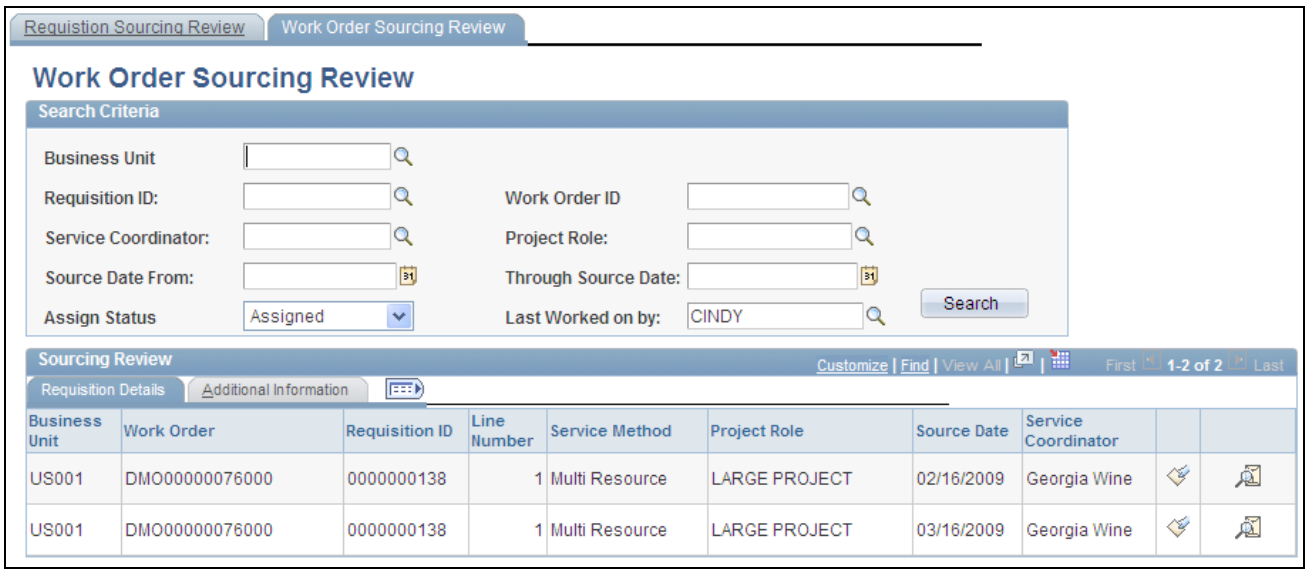
Note. Comments are visible only if the requester has selected the option to send the comments to the vendor.

Additional Information

Select the Additional Information tab to view more details about the service provider and requisition. This information includes the number of total positions, available positions, and filled positions.

Reviewing Sourced Work Orders for Suppliers

Access the Work Order Sourcing Review page (Services Procurement, Submit Bids; select the Work Order Sourcing Review tab on the Requisition Sourcing Review page).



Work Orders Sourcing Review page

Use the Search Criteria group box at the top of the page to enter specific search criteria. You can search by business unit, work order ID, requisition ID, or service coordinator, as well as various other search criteria. After you enter specific search criteria, click the Search button to view the results.

Use the Sourcing Review section in the bottom portion of the page to view work orders that have been sourced to suppliers by service coordinators. Select the Additional Information tab to review more details about the work order. These details include the number of positions, positions available, and those filled. The details also include the number of times that a bid has been submitted against the work order and the maximum number of bids allowed for the work order.

Click the Submit Another Bid button to access the Multi Resource Submit Bid page. Using that page, you can complete candidate information for multi-resource work orders and submit the bid.

Click to access the Work Order Sourcing History page, where you can review the sourcing history of the work order.

See Chapter 16, "Submitting and Managing Bids," Viewing Work Order Service Sourcing History, page 386.

Click to access the Comments page, where you can review comments associated with the requisition.

Note. Comments are visible only if the requester has selected the option to send the comments to the vendor.

Additional Information

Select the Additional Information tab to view more details about the service provider and work order. This information includes the number of total positions, available positions, and filled positions.

Submitting Bids

This section lists common elements and discusses how to:

- Submit bids.
- View individual services for multi-resource work orders.
- Submit bids for multi-resource child services.
- Create candidate profiles.
- Add attachments to bids.
- View requisition sourcing history.
- View work order service sourcing history.

Common Elements Used in This Section

Action Displays the *Submit* action by default. Additional actions are available only after you submit a candidate. Actions include retracting a bid while it's in a service coordinator or requester's queue.

Add Attachment

Click to attach a file related to the candidate, requisition, or work order. For example, you can attach Microsoft Word and Excel documents.

Note. You must select an existing candidate or create a new candidate profile before you can add an attachment.

See Chapter 16, "Submitting and Managing Bids," Adding Attachments to Bids, page 385.

Attach Resume

Click to attach a resume for the candidate.

Note. You must select an existing candidate or create a new candidate profile before attaching a resume.

Create Candidate

Click to access the New Candidate page, where you can create a new candidate profile.

Note. This button is active only after the supplier selects the Submit New Candidate option.

See Chapter 16, "Submitting and Managing Bids," Create Candidate Profiles, page 384.

Fixed Cost

Displays the fixed overhead rate.

Location

Displays the vendor location for this service provider. A link for the location also appears. Click the link to view the location's address.

Pay Rate

Enter the base rate for the service provider.

Save as Draft

Click to save the bid as a draft. The system saves information that you entered for candidate and bid. When you access the bid again using the Maintain Bid page, the folder type appears as a draft.

Service Provider

Select an available service provider to submit as a candidate.

Submit Existing Candidate

Select to submit a candidate who already has a candidate profile.

Note. When you select this option, the Service Provider field becomes available.

Submit New Candidate

Select to submit a new candidate.

See Chapter 16, "Submitting and Managing Bids," Create Candidate Profiles, page 384.

Supplier Rate

Displays the rate charged by the supplier.

Third Party Markup

Enter the third-party markup rate, if any.

Third Party Vendor Enter the third-party vendor name. This value appears if you entered a third-party markup.

Vendor Markup Displays the markup rate for the vendor. You can define the limits on vendor markups by amounts or percentages for particular service types.

Pages Used to Submit Bids

Page Name	*Definition Name*	*Navigation*	*Usage*
Submit Bid	SPF_SUBMITAL_PAGE	Service Procurement, Submit Bids Click the Submit Bid button on the Sourcing Review page.	Submit bids.
Multi Resource Submit Bid	SPF_SOURCE_SLT_MWO	Services Procurement, Submit Bids Select the Work Order Sourcing Review tab on the Requisition Sourcing Review page and then click the Submit Bid button on the Work Order Sourcing Review page.	View individual services for multi-resource work orders. **Note.** This page displays individual services associated with a parent work order. Click the Submit Another Bid button to continue to the Submit Bid page.
New Candidate	SPF_CANDIDATE_SEC	Click the Create Candidate button on the Submit Bid page.	To submit a candidate who is not yet profiled in the system, create a new candidate profile.
Resume Attachments	SPF_RESUME_ATTACH	Click the Attach Resume link on the Submit Bid page.	Attach the candidate's resume to the bid. **Note.** The process for uploading a candidate's resume is similar to that of uploading a bid attachment.

Page Name	*Definition Name*	*Navigation*	*Usage*
Bid Attachments	SPF_BID_ATTACH	• Click the Add Attachment link on the Submit Bid page. • Select the Work Order Sourcing Review tab on the Requisition Sourcing Review page. Click the Submit Bid button on the Work Order Sourcing Review page. Click the Add Attachment link on the Submit Bid page.	Add attachments to bids.
Sourcing History	SPF_SOURCE_HISTORY	Click the View History button on the Requisition Sourcing Review page.	View requisition sourcing history.
Work Order Service Sourcing History	SPF_SOURCE_HIS_WO	Click the View History button on the Work Order Sourcing Review page.	View work order service sourcing history.
Comments	PV_SP_REQ_COMMENTS	Click the Comments button on the Requisition Sourcing Review page.	View comments associated with the requisition. **Note.** Comments are visible only if the requester has selected the Send to Vendor option when creating the comments.

Submitting Bids

Access the Submit Bid page (Services Procurement, Submit Bids and click the Submit Bid button on the Sourcing Review page).

Use this page to submit a bid in response to a sourced service. After you submit the bid, you can use the Maintain Bids component to communicate with service coordinators concerning the bid.

This page displays the parent service when you are submitting a bid for a multi-resource service. The page also displays all the child services defined. You cannot submit a bid for the child services until the parent service is filled. You have to complete all the bid factors and enter a monetary amount before submitting a bid.

Note. A service provider/coordinator cannot submit himself as a candidate (service provider) on the Submit Bid page for a requisition that he sourced.

Enter Bid Information

The supplier must answer each bid factor question at the bottom of the submit bid page before submitting a candidate. Bid factor weightings affect the final score of the candidate.

After suppliers submit the first candidate, they can submit additional candidates for the requisition until they reach the maximum number of submittals.

If the system is set to use the rate breakdown feature, the supplier can enter the pay rate, fixed cost, markup, and third-party markup. The sum of the rates is the bid rate.

Rate Details

You define the pay type field labels on the Services Procurement Pay Types page. Pay type fields appear only if they are enabled on the PeopleSoft Services Procurement business unit.

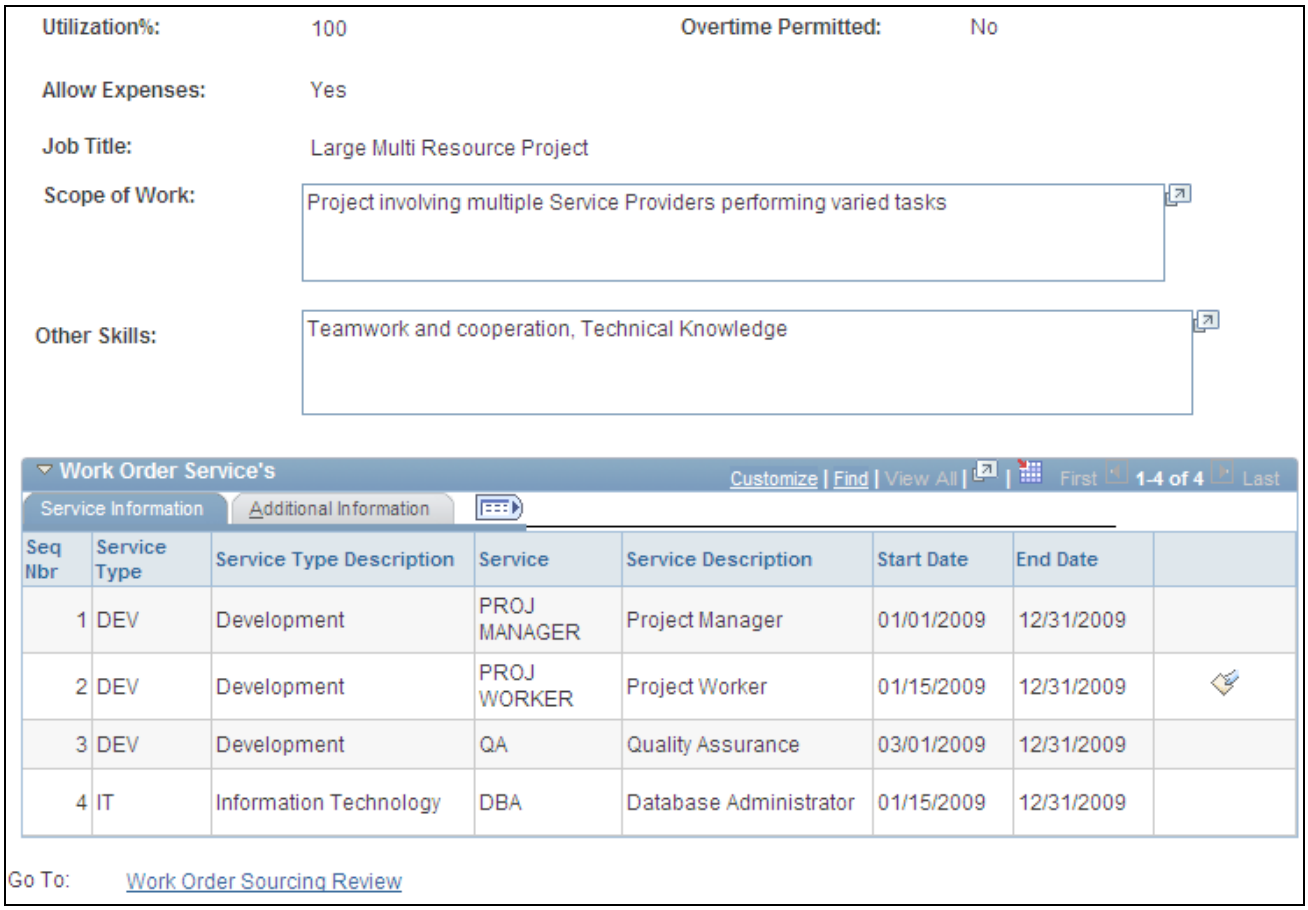
See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Understanding Bid Factors, page 117

Viewing Individual Services for Multi-Resource Work Orders

Access the Multi Resource Submit Bid page (Services Procurement, Submit Bids; select the Work Order Sourcing Review tab on the Requisition Sourcing Review page and then click the Submit Bid button for a multi-resource service on the Work Order Sourcing Review page).

Multi Resource Submit Bid page (1 of 2)



Multi Resource Submit Bid page (2 of 2)

You use this page to view individual services associated with a parent service. If the parent work order was created from a requisition, the page displays the requisition information. The individual work order services available for sourcing are shown in the grid.

The top portion of the page provides work order and requisition information, work order amounts, and information.

Work Order Services

This grid box provides details about the individual services that make up the parent work order.

Seq Nbr (sequence number)	Displays the work order sequence number. The system uses this number to track an individual service.
Service Type	Displays the type of service. Examples of a service type are manufacturing and information technology.
Service	Displays the role that a service provider performs such as a software engineer.
Start Date and **End Date**	Displays the date range for the corresponding service.

Click the Submit Another Bid button to access the Submit Bid page. You use this page to submit a bid for an individual service on a work order.

Additional Details

Select this tab to view the positions available and filled for each service.

Submitting Bids for Multi-Resource Work Orders

Access the Multi Resource Submit Bid page (Services Procurement, Submit Bids, select the Work Order Sourcing Review tab on the Requisition Sourcing Review page, and then click the Submit Another Bid button on the Work Order Sourcing Review page).

Use this page to submit a bid in response to a sourced work order. After you submit the bid, you can use the Maintain Bids component to communicate with service coordinators concerning the bid.

When working with multi-resource services work orders, you use the parent work order for totals, but use individual services within the parent work order on which to submit bids for services.

You can also add attachments to send with the bid submittal. Click the Bid Attachments link to access the File Attachments page where you can locate and upload an attachment.

Click the Submit button to submit the bid to the services coordinator. Click the Save as Draft button to save your updates to the bid submission. You can access the bid later to complete and submit it. After you save the bid as a draft, it appears as Draft folder type.

Requisition Requirements

Use this group box to view basic requisition details, requisition rates, service information, and candidate requirements and requisition competencies.

Enter Bid Responses

Use this group box to enter bid information about the service provider candidate. You use the Bid Response group box to answer questions about the candidate and the bid.

You must answer each bid factor question at the bottom of the submit bid page before submitting a candidate. Bid factor weightings affect the final score of the candidate. After suppliers submit the first candidate, they can submit additional candidates for the requisition until they reach the maximum number of submittals.

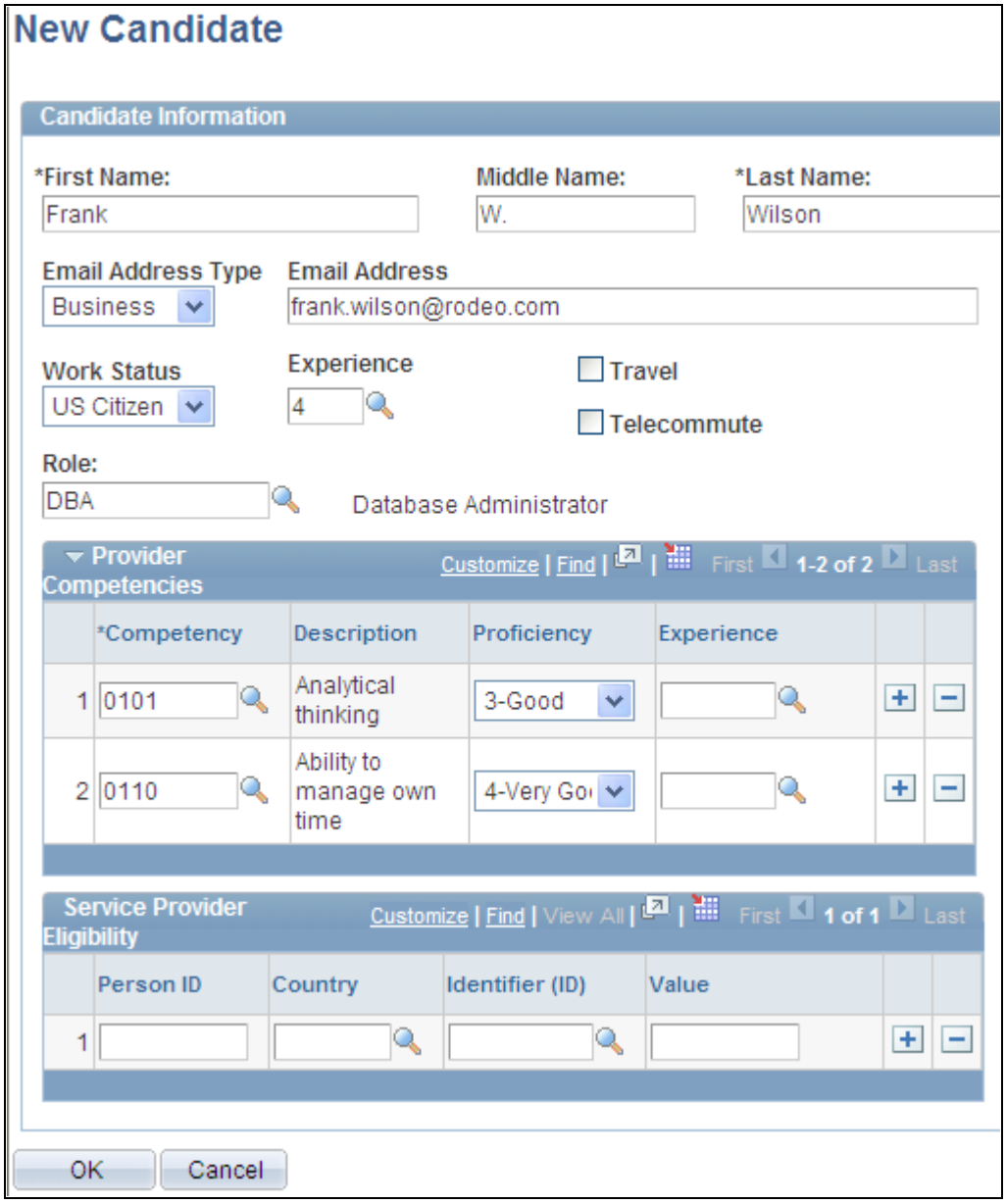
If the system is set to use the rate breakdown feature, the supplier can enter the pay rate, fixed cost, markup, and third-party markup. The sum of the rates is the bid rate.

See Also

Chapter 16, "Submitting and Managing Bids," Submitting Bids, page 379

Create Candidate Profiles

Access the New Candidate page (click the Create Candidate button on the Submit Bid page).



New Candidate page

Work Status Identify the work status for the new candidate. For example, green card holder and citizen.

Years Experience Identify the number of years of experience for the new candidate.

Travel Select if the candidate is willing to travel.

Telecommute	Select if the candidate is willing to telecommute.
Role	Identify the main role of the new candidate.
Competency	Identify the main skills associated with the new candidate.

Note. If a candidate is chosen to fill the requisition, the system administrator must add that person as a service provider on the User Profile Setup page. Then, the candidate has a user name and password and can log in to the system to enter time and expenses.

Service Provider Eligibility

Use this grid box to manage service provider details. When a service provider contact submits a new candidate, the contact can optionally enter candidate information related to the candidate's eligibility to fill requisitions or work orders.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Users and Team Setup, page 125

Adding Attachments to Bids

Access the Sourcing History page (click the Add Attachments link on the either the work order or requisition Submit Bid page).

Use this page to upload an attachment related to submitting a candidate as a service provider for a requisition or work order. Before you can access the page, you must select a candidate. To add an attachment using the Bid Attachments page:

1. Click the Upload button.

   The File Attachments window appears.

2. Click the Browse button to locate the file that you want to attach to the bid.

3. After accessing the file, click the Upload button on the File Attachments window.

   The system adds the file to the Bid Attachments page. You can add a description for the file or click the View button to view the file.

4. Click the OK button to save the uploaded attachment in the system.

   To add another attachment, click the + button.

Viewing Requisition Sourcing History

Access the Sourcing History page (click the View History button on the Requisition Sourcing Review page).

Use this page to view the requisition sourcing history. The page displays the requisition ID and line number that was sourced to the supplier and the service coordinator who sourced the requisition.

Requisition Status Displays the status of the requisition. You can search requisitions based on their status by using search criteria on the Requisition Sourcing Review page. Values include:

Closed

Filled

Pending

Sourced

Requisition Type Displays whether the requisition is an extended requisition or an original requisition.

The Sourcing History grid box provides information about the service coordinator who submitted the requisition to the supplier, the service provider contact, notification method, such as email, worklist, or both, and when the requisition was sourced to the supplier.

Viewing Work Order Service Sourcing History

Access the Sourcing History page (click the View History button on the Work Order Sourcing Review page).

Use this page to view work order sourcing history. For multi-resource services, the page displays the parent work order and requisition line. The page also displays work order amount details for the parent work order, along with information such as the service type and method, utilization, and scope of work.

Work Order Click to access the Details page for the work order. You can use that page to view the child services that make up the parent work order service.

Requisition ID and **Line Number** Displays the requisition on which the service order is based

Requester Displays who submitted the requisition on which the work order is based.

Also, the page displays who submitted the work order, the service provider contact to whom it was submitted, the date on which it was submitted, and the notification method. Click the Work Order Sourcing Review link to go to the Work Order Sourcing Review page, where you can select the history for another work order.

Maintaining Bids and Bid Responses

This section discusses how to:

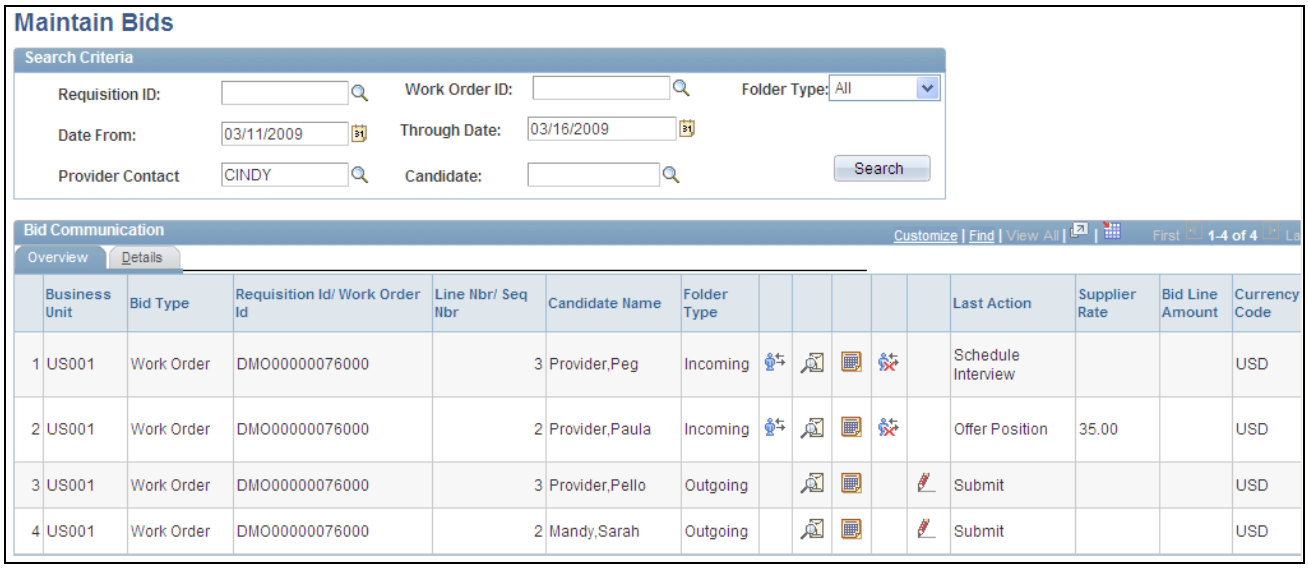
- View bid information.
- Maintain bid responses.

Pages Used to Maintain Bids and Bid Responses

Page Name	*Definition Name*	*Navigation*	*Usage*
Maintain Bids	SPF_SPC_BID_COM	Services Procurement, Maintain Bids	View bid information.
Supplier Bid Response	SPF_SUP_BIDRSP1	Click the Create Bid button on the Maintain Bids page.	Maintain bid responses.
Communication History	SPF_BID_HISTORY	Fulfill Service Requisitions, Bid History Click the Bid History button on the Maintain Bids page.	View bid history.
Interview Schedule	SPF_INTERVIEW_SCHD	Click the Interview Schedule button on the Maintain Bids page.	Maintain interview schedules.
Resume Attachments	SPF_RESUME_ATTACH	Click the Attach Resume button on the Supplier Bid Response page.	Attach resumes to bid responses.
Location Address	SPF_ADDRESS_LOC	Click the Vendor Location Address link on the Supplier Bid Response page.	View the vendor location address.

Viewing Bid Information

Access the Maintain Bids page (Services Procurement, Maintain Bids).



Maintain Bids page

Use this page to search for and access work orders and requisitions associated with bids. The page enables you to access bid features, monitor the bidding process, and communicate with service coordinators. Supplier users use the page to respond to incoming bids and view bids that have been submitted. You can limit search results using search criteria, such as for a requisition or work order, business unit, service provider contact, or candidate.

You can also select a value in the Folder Type field to indicate the type of bid for which you want to search. Field values include:

- *All:* Select to view all types of bids.
- *Draft:* Select to view only draft bids. These are bids that have been saved as drafts on the Supplier Bid Response page.
- *Incoming:* Select to view only bid responses that are coming from service coordinators.
- *Outgoing:* Select to view only outgoing bid responses that have been sent to service coordinators.

Click the Search button to initiate the search. The system displays the search results.

If you are working with a multi-resource work order, this page displays the information that a service provider contact would normally see on the sourcing review pages for the parent service. The service provider contact can see all the services information on this page for a multi-resource work order, such as the number of times the bid was submitted, the maximum submittal limit, and number positions. Service provider contacts can only submit candidates for the sourced services.

Note. When the system compares a service method, it verifies that the comparison is valid for multi-resource requisition sourcing and work order service sourcing.

Bid Type Displays whether the bid is based on a requisition or a work order.

Requisition ID/ Work Order ID Displays either the requisition or work order identifier.

Line Nbr/ Seq Nbr(line number/sequence number)	Displays either the line number for a requisition or the sequence number for a work order. The system uses these numbers to track elements of a requisition or work order.
Candidate Name	Displays the name of the person who has been identified as the service provider for the work order or requisition.
Folder Type	Displays whether this requisition line or work order sequence is coming from a service coordinator or going to a service coordinator. Draft requisitions or work orders are those that have been updated and saved, but not submitted back to the service coordinator.
	Click the Create Bid button to access the Supplier Bid Response page, where you can enter a bid for the selected requisition or work order service.
	Click the Submittal History button to access the Communication History page, where you can view the bids for the selected work order or requisition.
	Click the Interview Schedule button to access the Interview Schedule page. **Note.** The Interview Schedule button appears only on the Maintain Bids page if the service coordinator has scheduled an interview for the bid.
	Click the End Communication button to generate a bid response that ends the communication regarding a particular bid. After communication has ended, a bid can no longer be considered for a requisition or work order.
	Click to access the Supplier Bid Response page. If the requisition or work order has not been filled, you can still edit the bid response. You can also withdraw a bid before the service coordinator or requester responds using the page. To withdraw a bid, select the *Retract Bid* value in the Action field on the Supplier Bid Response page. When you withdraw a bid before the service coordinator responds to it, the system issues a warning message to confirm that you want to retract the bid submission and then sends an email to inform the service coordinator or service coordinator team. The system also sends an email to the requester if a service coordinator has forwarded the bid to the requester. The withdrawn bid is removed from worklist entries and is not available in the service coordinator's or requester's inbox. **Note.** If the service provider contact edits bids or withdraws bids that have been submitted, the system sends a notification to the service coordinator and the requester if the service coordinator has already forwarded the bid on to the requester for review.
Last Action	Displays the last action performed on the incoming, outgoing, or draft bid. For example, if the service coordinator has responded to fill a bid, the value of the last action performed would be *Fill Bid.* Other values can include *Submit,Decline,Reply,* and *Accept Offer.*

Supplier Rate Displays the value contained for the supplier's bid rate. This value is the total amount for all service provider costs, including the pay rate, expenses, and markups.

Bid Line Amount Displays the total amount for the requisition line.

Currency Code Displays the currency for the supplier rate and bid amount.

Details

Select this tab to view more information about the bid.

Date Time Displays the rate of pay established for the bid for the requisition or work order.

Sent From Displays the service coordinator who sent the last communication concerning the work order or requisition.

Maintaining Bid Responses

Access the Supplier Bid Response page (click the Create Bid button on the Maintain Bids page).

Use this page to respond to service coordinators about bids. The page contents depend on whether you access a requisition bid or work order bid, and the status of the bid. Page contents can include previous and current bid information, candidate skills, bid factors, and rate details. Also, depending on the status, you can update various details about the bid and submit it using another action.

Note. A service provider/coordinator cannot act on a bid on the Supplier Bid Response page if she submitted the bid or if she is the service provider on the bid.

Note. This page is similar to the Submit Bid page. For more information about fields on the Supplier Bid Response page, see the Submitting Bids section.

See Chapter 16, "Submitting and Managing Bids," Submitting Bids, page 376.

Previous Bid Information

This section includes previous bid information and provides links that you can use if you are updating the bid.

Supplier Location Displays the supplier location.

Action Displays the bid response to the service coordinator for the previous bid. Values are based on the current status and include *Accept Offer,Withdraw, Reply,Decline Offer,* and *End Communication.*

You can use the *Withdraw* value to withdraw a submittal after it's already in the service coordinator's or requester's queue.

Comments Displays all comments for the previous bid.

Rate Details

Rate details appear for the previous bid and the current bid. You can update the rates for the current bid.

Proposal Amount View or edit the total proposal amount for the entire deliverable or multi-resource service.

Note. Rates and quantities entered in any bid factor responses do not need to total up to the proposal rate.

Rate View or edit the rate.

Amount in Requisition Currency Displays the amount currency.

Comments Enter comments concerning the bid.

Current Bid Response

Use this section to update a bid response by selecting an action. Based on the status of the bid, the system provides the appropriate actions.

Managing Service Providers

This section discusses how to:

- Manage service providers.
- Maintain service provider information.

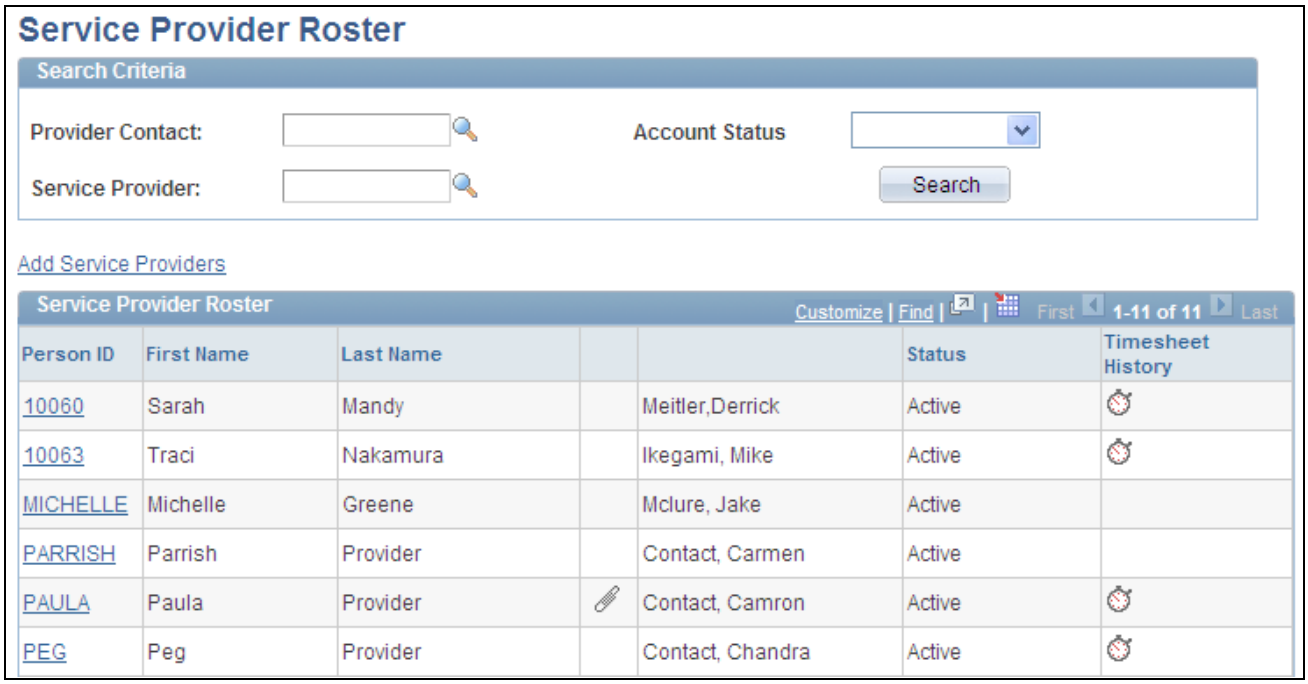
Pages Used to Manage Service Providers

Page Name	*Definition Name*	*Navigation*	*Usage*
Service Provider Roster	SPB_PROV_ROST_PG	Services Procurement, Manage Service Providers	Manage service providers that includes reviewing and updating service provider information.
Maintain Service Provider	SPB_PERS_PROV_PAGE	Click the Add Service Providers link on the Service Provider Roster page.	Maintain service provider information.

Page Name	Definition Name	Navigation	Usage
Manage Time/Expense Sheets	SPA_MANAGE_TE	Click the Timesheet History button on the Service Provider Roster page.	View timesheet history.

Managing Service Providers

Access the Service Provider Roster page (Services Procurement, Manage Service Providers).



Service Provider Roster page

After completing the search criteria, click the Search button to populate the Service Provider Roster grid box.

Provider Contact Select a provider contact whom you want to include in the search results. If you leave the field blank, the system displays information for all service provider contacts in the organization.

Account Status Select an account status on which to base the search. Statuses include:

Active: Select to include only active service providers.

InActive: Select to include only inactive service providers.

*Pending Registration:*Select to include only those service providers who are pending activation. New service providers added by the service provider contact during bid submittal using the New Candidate page are initially created with this status.

Service Provider Select the service provider for whom you want to search.

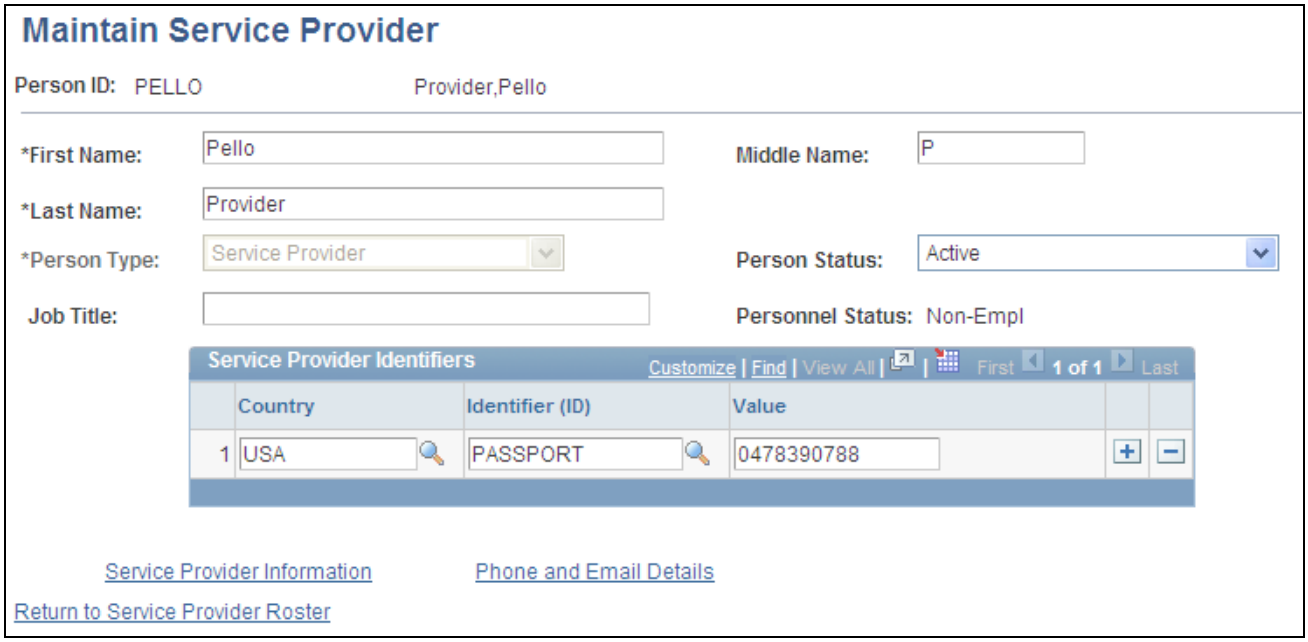
Add Service Providers Click to access the Maintain Service Provider page, where you can add service providers.

Person ID Click to access the Maintain Service Provider page, where you can review and update service provider information.

Click the Timesheet History button to access the Manage Time/Expense Sheets page, where you can view the history for a service provider timesheet.

Maintaining Service Provider Information

Access the Maintain Service Provider page (click the Add Service Providers link on the Service Provider Roster page).



Maintain Service Provider page

This page displays service provider information.

Person Type Displays the type of role that the person performs. Values include:

Service Provider: This is the standard person type for a service provider and is the status automatically assigned by the system when the provider is created.

Service Provider/Coordinator: Only those service providers who have also been given a service coordinator role will have this person type.

Person Status Select a value to indicate the status of the service provider. Values are *Active, Inactive,* and *Pending Registration.*

Job Title	Enter the classification of the position. The value appears by default from the service attributes, if it has been defined.
Personnel Status	Displays the service provider's nonemployee status.
Employee ID	Enter the identifier for the employee.
Country	Select a country code. The Service Provider Identification grid contains additional information that you use to identify a service provider. When you select a country code, the identifiers specific for that country will be available for selection, along with any applicable noncountry-specific identifiers. For example, a Social Security number (SSN) would be applicable only for the United States. You use service provider identifier information for eligibility validation when eligibility tracking is enabled for a business unit.
Identifier (ID)	Select a type of information to use to uniquely identify a person. This information, such as a driver's license or passport, can be used to verify the service provider during the bidding process and work order creation.
Value	Enter a value for the identifier. For example, if you selected to use a phone number as an identifier, then you would enter the number in this field.
Service Provide Information	Click to access the Service Provider Information page, where you can view and update additional provider information details.
Phone and Email Details	Click to access the Phone and Email Details page, where you can view and update contact information for the service provider.

Chapter 17

Assessing and Awarding Bids

This chapter provides an overview of the supplier communications and discusses how to:

- View and respond to bids.
- Create and maintain interview schedules.

Understanding Supplier Communications

In PeopleSoft Services Procurement, supplier communications enable service coordinators to collaborate and communicate with suppliers and requesters to match qualified bids with open service requisitions and work orders.

PeopleSoft Services Procurement enables service coordinators and requesters to perform these tasks:

- Review incoming, draft, and outgoing supplier bid information.
- Exchange continuous bid communication (service coordinator and requester).
- Respond to bid submissions (service coordinator only).
- Schedule interviews for submitted candidates (service coordinator only).
- Select a qualified bid to fill the position (service coordinator only).

To communicate with suppliers:

1. Access the Assess and Award Bids page to view qualified bids submitted by service provider contacts.
2. Use the Bid Response page to respond to supplier bids.

   Note. Candidate selection is complete when you select the *Fill* value as the bid action. This action officially ends the bid process between you and the supplier. An email notification is automatically sent to all bidding service provider contacts to inform them that the request has been filled by another supplier.

3. Use the Bid Response page to view the responses sent.
4. Access the Interview Schedule page to schedule and rate interviews (service coordinator and requester).
5. Use the Analyze Line and Analyze Total pages to analyze bid amounts and line scores for all bids submitted for the requisition or work order request.

   You can also change the bid factor weightings on these pages to perform a what-if analysis.

6. Fill the requisition or work order from either the Analyze Total page or the Bid Response page.

For more information about how suppliers submit bids and manage their awarded bid, see the Submitting and Managing Bids chapter.

See Chapter 16, "Submitting and Managing Bids," page 367.

Multi-Resource Requisition and Work Order Bids

The multi-resource services feature supports a grouping of multiple unique services and service providers for PeopleSoft Services Procurement requisitions and work orders. The bidding for multi-resource services is a two-step process. First, the multi-resource (parent) service is filled, and subsequent to that the individual (child) services can be sourced from the parent work order and filled by the supplier that was selected.

Service coordinators, requesters, and service provider contacts can communicate about bids for individual child services. A service coordinator can fill multiple positions for an individual work order service until total position quantity is reached. Each individual work order service position is converted to a child work order for the multi-resource parent.

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Multi-Resource Services, page 203.

See Also

"PeopleSoft Services Procurement Preface," page xxiii

Prerequisites

Before you can communicate with suppliers about requisitions and work orders, suppliers must respond to the sourced service by submitting bids.

Viewing and Responding to Bids

This section discusses how to:

- View bids.
- Respond to bids.
- Analyze event lines.
- Analyze event totals.
- Post an award.

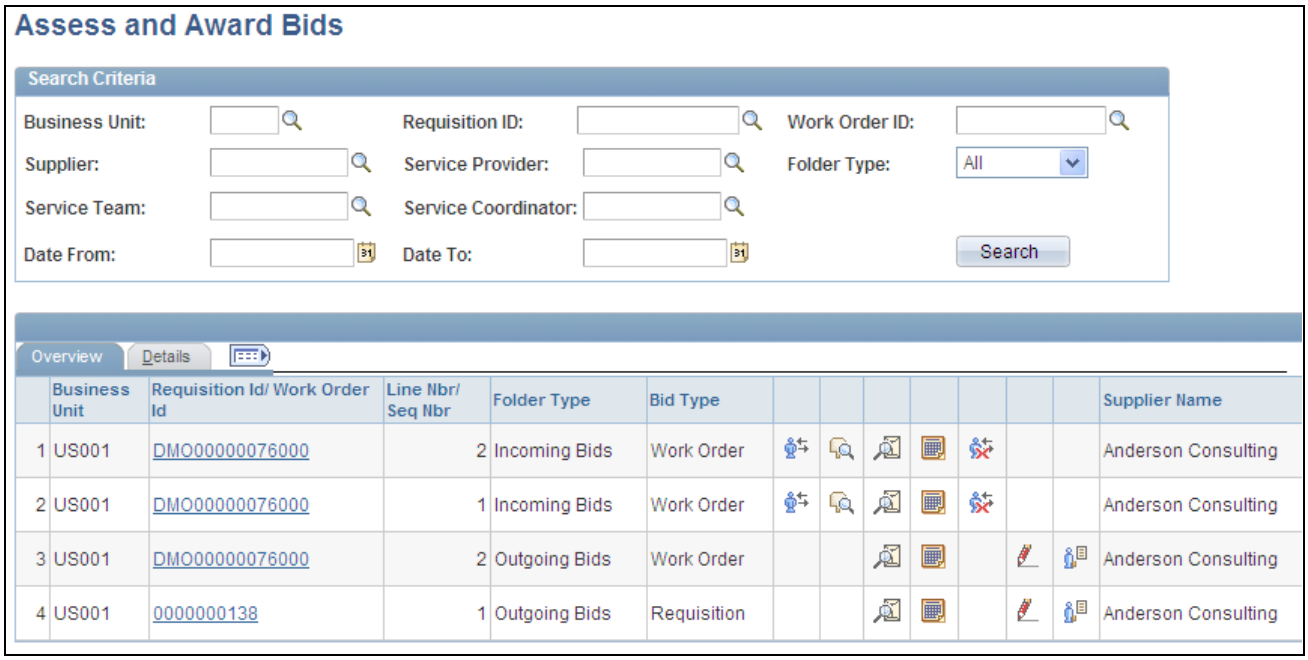
Pages Used to View and Respond to Bids

Page Name	*Definition Name*	*Navigation*	*Usage*
Assess and Award Bids (for service coordinators and requesters)	SPF_SC_BID_COM	Services Procurement, Assess and Award Bids	View bids including incoming bids submitted by suppliers, outgoing bids to suppliers, and draft bids.
Requisition Line Job Summary	SPF_REQ_SUMMARY_PG	Click the linked requisition ID on the Assess and Award Bids page.	View job summary details.
Work Order Summary	SPF_WORDER_DETAIL	Click the linked work order ID on the Assess and Award Bids page.	View work order details.
Bid Response (for service coordinators and requesters)	SPF_CLIBID_RSP	Click the Bid Response button on the Assess and Award Bids page.	Respond to bids.
Analyze Line (for service coordinators and requesters)	AUC_ANALYZE_HDL_PG	Click the Analyze Events button on the Assess and Award Bids page.	Analyze event lines including line amounts and scores for all supplier bids that respond to a requisition or work order request.
Analyze Total (for service coordinators and requesters)	AUC_ANALYZE_HD_PG	Click the Analyze Total link on the Analyze Line page.	Analyze event totals, including amounts for all supplier bids that respond to a requisition or work order request.
Award Details (for service coordinators and requesters)	AUC_AWARD_DT_PG	Select which bid to award and click the Award Details link on the Analyze Total page.	View the details of your events.
Vendor Information (for service coordinators)	AUC_AWARD_VNDR	Click the Bidder Name link on the Award Details page.	View vendor information.
Line Bid Factors (for service coordinators)	AUC_LN_BF_SEC	Click the Add/Edit Bid Factors link on the Analyze Events page.	Add line bid factors while analyzing events.
Search Bid Factors by Group	BID_FCTR_GRP_SRCH	Click the Add Bid Factors by Group link on the Line Bid Factors page.	Add bid factors by group.
Submittal History	SPF_CLIBID_HIS	Click theSubmittal History button on the Assess and Award Bids page.	View the history for requisition and work order bid responses.

Page Name	Definition Name	Navigation	Usage
Bid Attachments	SPF_BID_ATTACH	Click the Attachments link on the Bid Response page.	View and upload attachments that are associated with the bid such as documents or spreadsheets.

Viewing Bids

Access the Assess and Award Bids page (Services Procurement, Assess and Award Bids).



Assess and Award Bids page

Use this page to search for and access bids associated with sourced work orders and requisitions. You can use the page to respond to an incoming bid or edit a draft or outgoing bid. You can limit search results using search criteria, such as for a requisition or work order. Select a value in the Folder Type field to indicate the type of bid for which you want to search. Field values include:

- *All:* Select to view all types of bids.
- *Draft:* Select to view only draft bids. These are bids that have been saved as drafts on the Bid Response page.
- *Incoming:* Select to view only incoming bid responses. These bids are awaiting your action.
- *Outgoing:* Select to view only outgoing bid responses.

Click the Search button to initiate the search. The system displays the search results.

If you are working with a multi-resource work order, this page displays the information for the higher-level parent work order or requisition line service. The page displays information such as the number of times the bid was submitted, the maximum submittal limit, and number of positions.

Overview

Select the Overview tab.

Requisition ID/Work Order ID	Click to view the details of a requisition or work order. The *Bid Type* value indicates whether the bid is related to a work order or requisition.
Line Nbr/Seq Nbr (line number/sequence number)	Displays the line number for requisitions or the sequence number for multi-resource work orders to identify the related child service for the bid.
Folder Type	Displays whether the bid is a draft bid or an incoming or outgoing bid.
Bid Type	Displays whether the bid is based on a requisition or a work order.
	Click to access the Bid Response page and to respond to the supplier or requester.
	Click to access the Bid Analysis page to compare competing bids.
	Click to access the Bid History page.
	Click to access the Interview Schedule page.
	Click to generate a bid response that ends the communication regarding a particular bid. After communication has ended, you can no longer consider the bid for a requisition or work order. The system provides a confirmation page, where you can confirm that you want to end communication. You can also enter a reason code for ending communication and comments about the action.
	Click to access the Bid Response page. Using this page, you can update bid information to complete it and respond to the bid. When you save a bid response as a draft, you can access the bid using this button.
	Click to navigate to the associated work order for filled bids.
Supplier Name	Displays the supplier from which the requisition or work order bid was received.
Candidate Name	Displays the service provider submitted by the supplier. **Note.** The Candidate Name field is blank for bids on deliverable or multi-resource parent services.
	Click the View Resume button to open the resume for the service provider.

Supplier Rate Displays the rate for resource services. The rate appears in the requisition currency.

Note. The Supplier Rate field is blank for deliverable or multi-resource parent services.

Bid Line Amount Displays the amount for deliverable or multi-resource parent services.

Note. The Bid Line Amount field is blank for resource services.

Score Displays the calculated score based on the previous response.

Details

Select the Details tab. The tab displays additional information about the work order or requisition such as the last action, date, and who performed the action.

Last Action Review the last actions submitted by the supplier.

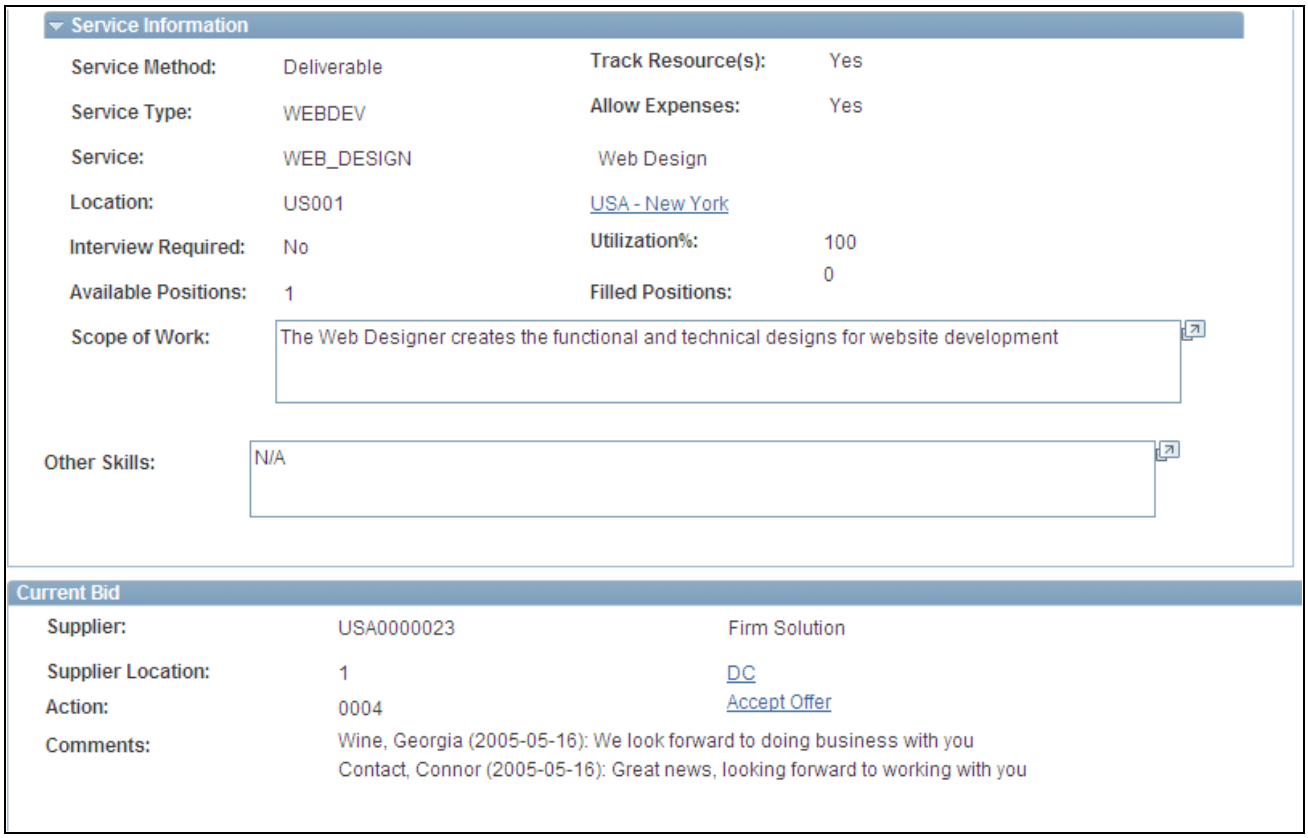
Date Displays the date and time that the supplier responded to the bid.

Sent From Displays the name of the user who sent the bid.

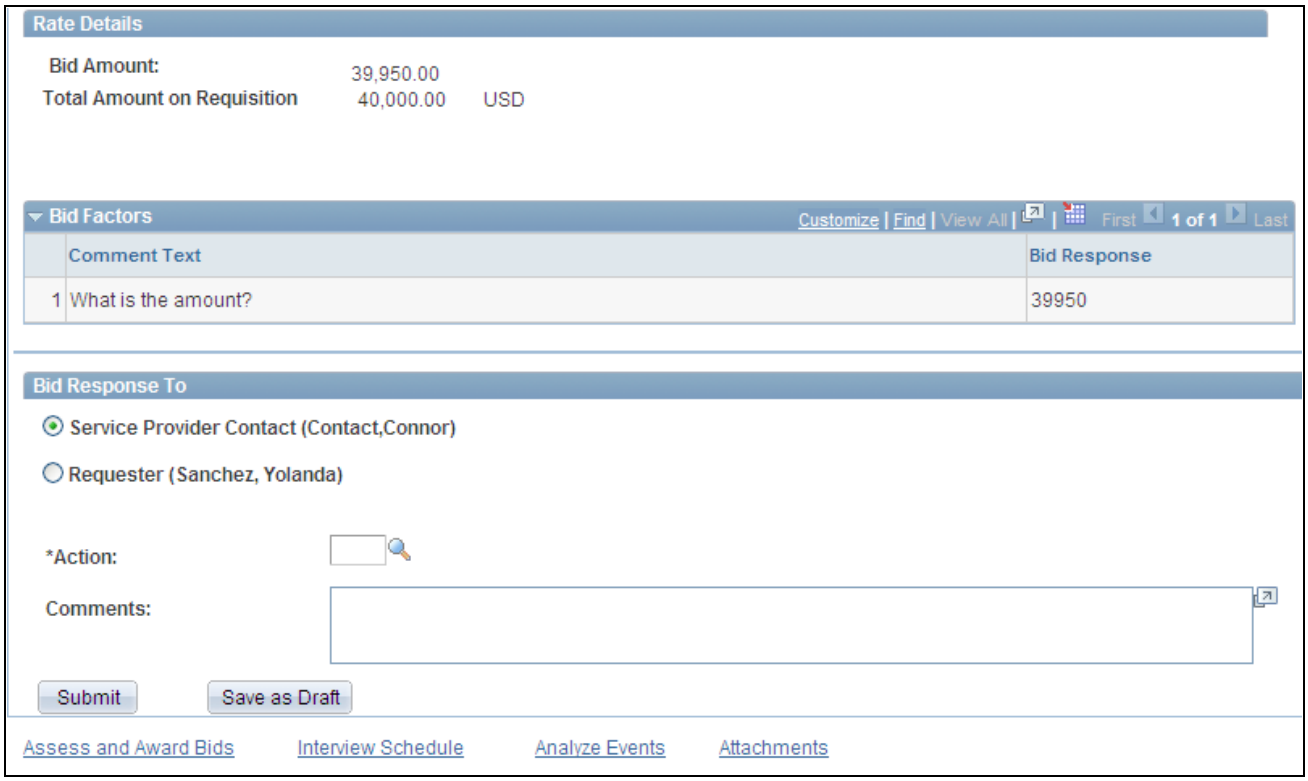
Responding to Bids

Access the Bid Response page (click the Bid Response button on the Assess and Award Bids page).

Bid Response page (1 of 3)



Bid Response page (2 of 3)



Bid Response page (3 of 3)

Service coordinators use this page to respond to supplier bids. The page displays information about requisitions or work orders depending on the type of bid to which you are responding. To access either a requisition or work order, click the Work Order ID or Requisition ID link on the Assess and Award Bids page.

The page has numerous formats depending on whether it's for a resource or deliverable service, whether it's for a requisition or work order replacement, and whether it's for a multi-resource service or related individual service. The most common use of the Bid Response page is with resource requisitions. The previous page examples are based on resource requisition sourcing.

Requirements

This section displays information about the requisition or work order, including the services coordinator and start and end dates. In the case of work order replacements, the Replacement For field displays the work order that requires a replacement service provider. The Sequence Number field appears for the work order sequence. The requisition and requisition line number also appear in this section.

You can also perform bid communications for multi-resource work orders. Communications among the service coordinator, requester, and service provider contact act the same way as work order sourcing, except that the system also updates the parent work order with the candidate and rate information after you identify the candidate for the individual service.

Details

This section displays pay rates, fixed cost, and expense rates for a work order. The 3rd Party Markup field displays additional markups that are charged when the supplier secures resources from a subcontractor, and is available when the SP Pay Types Enabled check box is enabled on the Services Procurement Installation Options page.

Requisitions use a Rate Details grid that displays total amount for the requisition along with the total expense. It also displays average filled rate and amounts for requisition.

Service Information

This section displays service information, such as whether the work order or requisition uses a multi-resource, deliverable, or resource service method.

Candidate Requirements

This section provides candidate competency requirements for the resource services. Available in the section, for example, are the education level, experience, and other skills. The fields in this section are the same for work orders and requisitions.

Current Bid

This section displays bid information for the work order or requisition.

 Click to enter the new bid action response.

Action

Select an action and optionally respond to suppliers with comments. This field is required even when you save the bid as a draft. Values include:

- *Schedule Interview*

  0001

- *Fill Bid:*

  0004

- *Offer Position:*

  0003

- *Reply:*

  0010

- *Decline:*

  0011

- *End Communication:*

  0015

Note. After you select *End Communication*, the bid process between the service coordinator and the supplier officially ends.

Note. To fill the requisition or work order, select *Fill Bid.* This sends a worklist entry to the requester notifying him that a work order must be generated. The worklist may also go to the service coordinator if his defaults specify that he can create work orders. In addition, the Generate Work Order button becomes available at the bottom of the Bid page for service coordinators having authorization

If preapproval sourcing is in effect, the service coordinator cannot offer the position until the requisition has been approved.

When PeopleSoft Commitment Control has been enabled, service coordinators cannot offer positions or manually release work orders until the requisition has been budget checked.

Vendor Address Name (the actual location name appears on the page)

Click to access the Vendor Address page. You use this page to view the vendor's address information.

Submit

Click to access the Submittal History page. You use this page to view the history of the bid submissions.

Rate Details

Bid Rate	Displays the bid rate for resource services.
Bid Amount	Displays the bid amount for deliverable or multi-resource services.
Total Amount on Requisition	Displays the total amount for the requisition.

Bid Factors

Displays bid factor questions for the service and responses provided by the supplier for this bid.

Bid Response To

Select the appropriate option in this group box to send communications to the requester who originally submitted the requisition or to the service provider contact who submitted the bid.

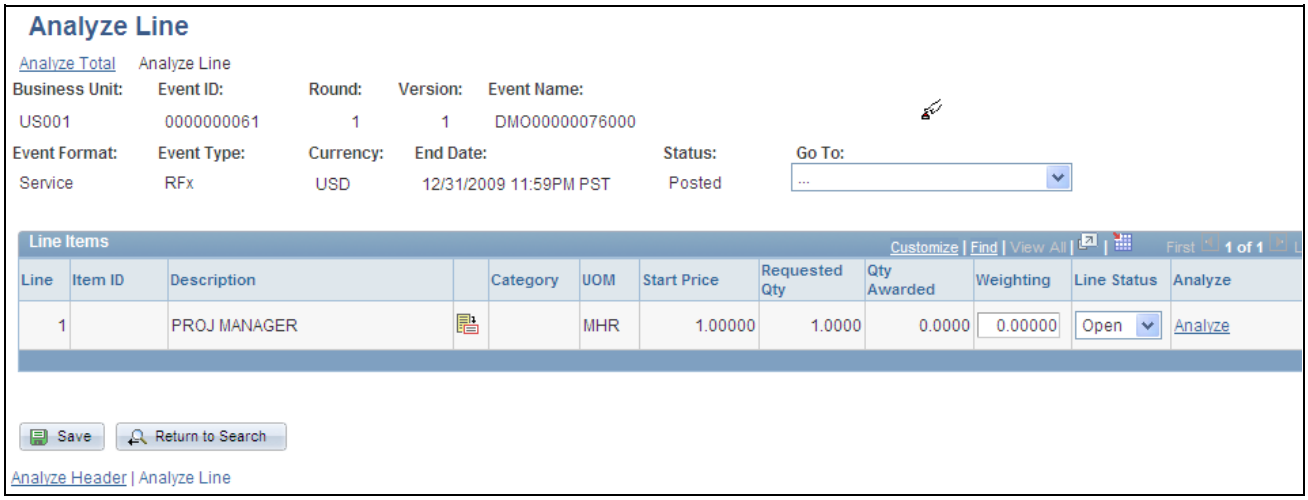
Service Provider Contact	Select to submit the bid response to the service provide contact. **Note.** A service coordinator can send a response to either the requester or the service provider contact, not both. If a response is sent to a requester, the service coordinator and requester can select only bid actions that are specific to their communications. Additional bid actions that are intended for the service provider contact are filtered out.
Requester	Select to submit the bid response to the person who requested the requisition.
Action	Select the response that you want to make to the bid.
Comments	Enter any comments that you want to include in your response.
Submit	Click to send the bid response to the selected user.
Save as Draft	Click to save the work that you have completed for the page without submitting it. The system saves the response and makes it available as a Draft Bid in the Folder Type column on the Assess and Award Bid page. To make additional changes to the bid, click the Edit button on the Assess and Award Bid page.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Creating Bid Factors, page 121

Analyzing Event Lines

Access the Analyze Line page (click the Analyze Events button on the Assess and Award Bids page).



Analyze Line page

Optionally, use this page to view and maintain details about a single event line. To view and maintain event totals, click the Analyze Total link.

Click the Change RFI Status to Reviewed (change request for information status to Reviewed) button to update the event. When you click the button, the system removes the button and updates the Status field to *RFI Rvwed.*

Analyze

Click to have the system run a bid analysis. You can analyze bids at any time during an event, or you can wait until it ends. When analyzing events, you can sort the information using different criteria. For example, you can sort by highest score, lowest price, or lowest total cost to display the best bid.

When the system completes the analysis, it displays additional information about the bid, including the analysis results and bid factors. You can also assign a bid action or recalculate the bid using the page.

Bid Action

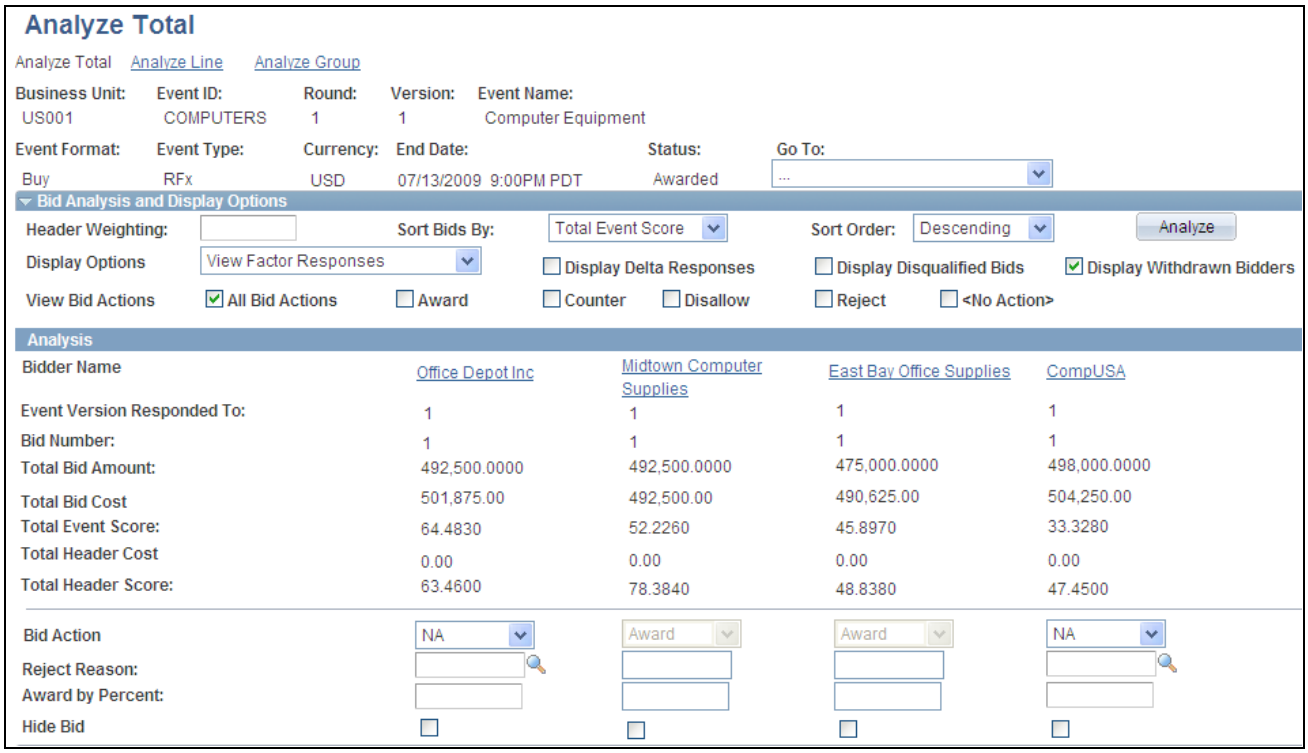
After you analyze a bid, this field becomes available for you to select an action for the bid, including awarding the event to a bidder. Select *Award* in the Bid Action field. You can award the event to one bidder only.

See Also

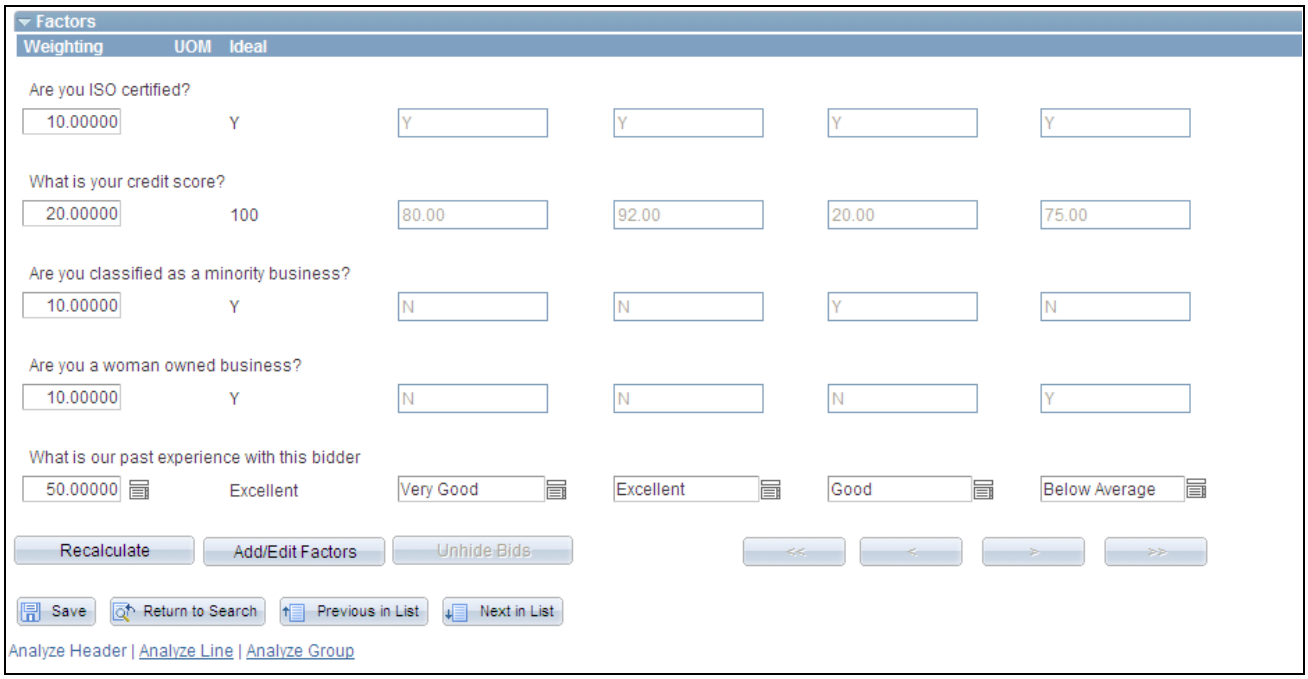
PeopleSoft Strategic Sourcing 9.1 PeopleBook, "Analyzing Bids and Awarding Events"

Analyzing Event Totals

Access the Analyze Total page (click the Analyze Total link on the Analyze Line page).



Analyze Total page (1 of 2)



Analyze Total page (2 of 2)

Bidders can view award details when the event status is awarded and you deselect the Display Bids check box on the Award Details page.

Bid Action

To award an event to a bidder, select *Award* in the Bid Action field. You can award the event to one bidder only.

See Also

PeopleSoft Strategic Sourcing 9.1 PeopleBook, "Analyzing Bids and Awarding Events," Awarding Events

Posting an Award

Access the Events Details page (select a bid, and click the Award Details link on the Analyze Events page).

Post Award

Click to post your bid event and award the contract to a supplier. Posting the award sends a worklist item to the requester to generate a work order. A worklist item also is sent to the service coordinator if he is authorized to create work orders as defined in the service coordinator defaults.

Note. After you post the award, the line details appear.

See Also

PeopleSoft Strategic Sourcing 9.1 PeopleBook, "Analyzing Bids and Awarding Events," Posting Awards

Creating and Maintaining Interview Schedules

This section provides an overview of the interview process and discusses how to:

- Create an interview schedule.
- Evaluate candidates based on their interviews.

Understanding the Interview Process

Here is an overview of the interview process:

1. Access the Interview Schedule page (service coordinator and requester).

   Enter the required values such as the interview date, time, and interviewer.

   Note. After you schedule a candidate interview for a requisition or work order service, the interview schedule details appear for the supplier.

   Note. The interviewer must have the requester, service coordinator, or approver role.

2. Access the Interview Schedule Details page (service coordinator, requester, and interviewers).

   Use this page to rate the candidate after interview is complete, then select the Interview Complete check box to update the status. The service coordinator or requester can also select the Send Email Notification check box to notify interviewers and the service provider contact of the interview schedule information.

   Note. Only service coordinators and requesters can access the Send Email Notification check box.

3. Save the page.

Upon completing the interview, the interviewer rates the candidate using the star rating system. After the Interview Completed check box is selected, the system calculates the average interview score for that candidate by selecting the rating for all completed interviews and dividing it by the number of completed interviews. This value is then saved in PeopleSoft Strategic Sourcing bid factor tables and used to calculate the candidate's overall score.

Note. The Enable Rating setting on the business unit does not affect ratings for an interview; it only controls whether timesheet ratings are used.

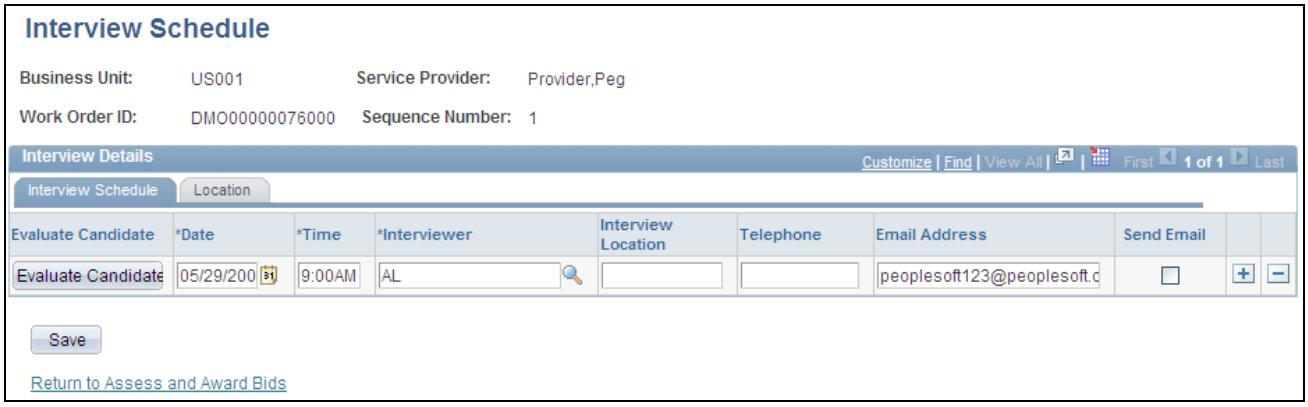
Note. The calculation of scores happens only when the interview bid factor is associated with this requisition or work order. If the interview bid factor is not used, the rating on the interview page is used for information purposes and is not used to determine the candidate's overall score.

Pages Used to Create and Maintain Interview Schedules

Page Name	*Definition Name*	*Navigation*	*Usage*
Interview Schedule	SPF_INTERVIEW_SCHD	Services Procurement, Assess and Award Bids Click the Interview Schedule button on the Assess and Award Bids page.	Create and update an interview schedule for a candidate.
Interview Schedule Details	SPF_REQ_SUMMARY_PG	Click the Evaluate button on the Interview Schedule page.	Evaluate candidates based on their interviews.
Job Summary Details	SPF_REQ_SUMMARY_PG	Click the linked requisition number or line number on the Assess and Award Bids page.	View job summary details.

Creating an Interview Schedule

Access the Interview Schedule page (click the Interview Schedule button on the Assess and Award Bids page).



Interview Schedule page

Enter the details of the interview schedule, including date, time, and interviewer. Header information displays either the work order ID or requisition ID.

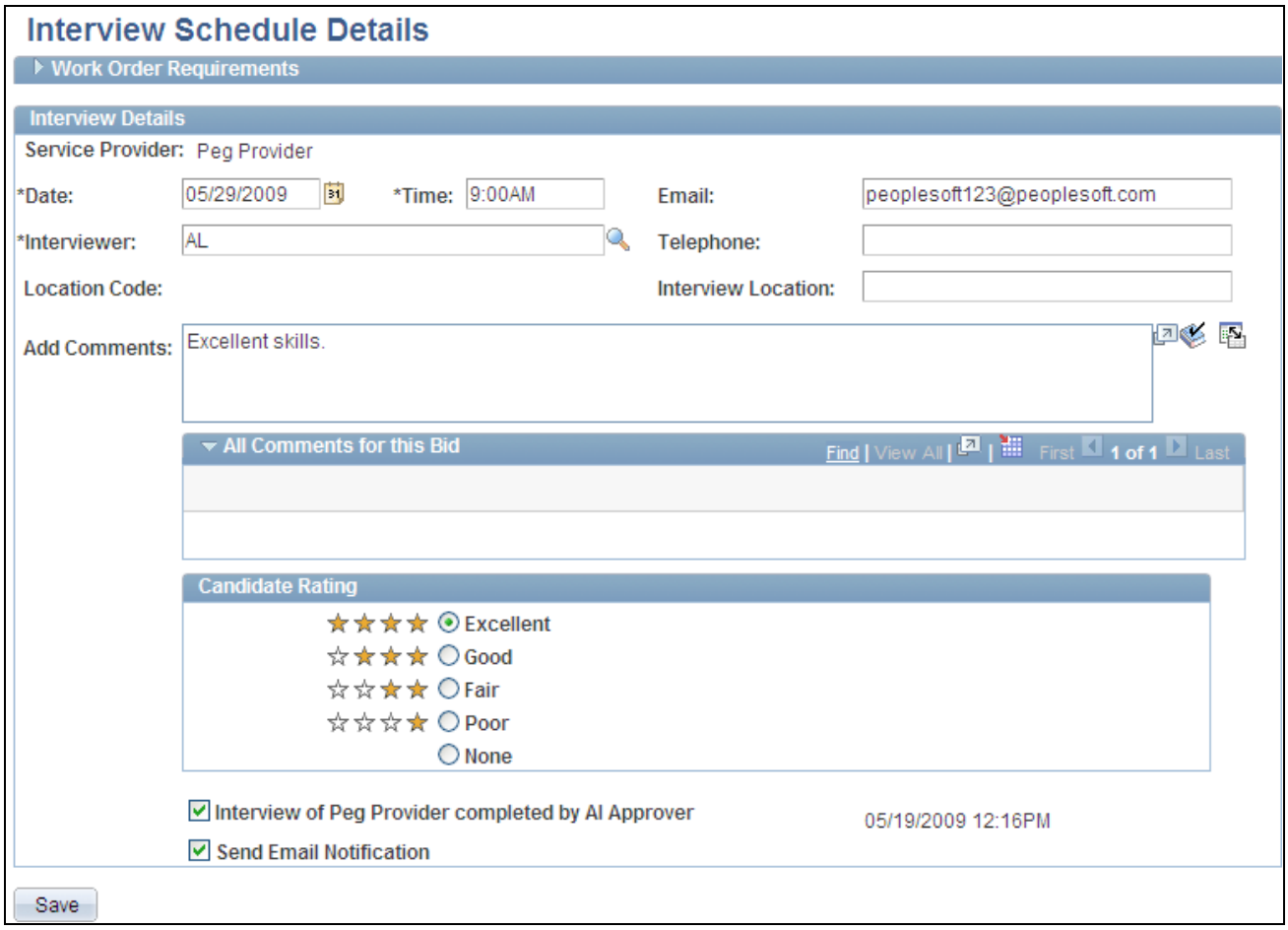
Requesters and service coordinators can view the service providers scheduled for interviews. Click the Evaluate Candidate button to access the Interview Schedule Details page, where you can evaluate the candidate and provide interview details.

Note. You cannot update an interview schedule after you select *Fill bid,Position No Longer Available,Offer Accepted*, or *No Longer Available.*

You can also set up interviews for individual service bids related to a multi-resource service.

Evaluating Candidates Based on Their Interviews

Access the Interview Schedule Details page (click the Evaluate Candidate button on the Interview Schedule page). This button is available after you set up the interview.



Interview Schedule Details page

Use this page to evaluate a candidate for a requisition or work order based on the candidate's interview.

Candidate Rating Select a candidate rating. Options include Excellent, Good, Fair,Poor, and None.

Interview Completed Select to indicate that the interview was completed.

Send Email Notification Select to notify interviewers and the service provider contact of the interview schedule information.

Note. Only the service coordinator and the requester can access the Send Email Notification check box.

Chapter 18

Managing Work Orders

This chapter provides an overview of services work orders and discusses how to:

- Create and manage work orders.
- Create purchase orders with the Quick Sourcer.
- Manage purchase orders.
- Close services purchase orders.
- Manage work order sourcing and assigning new resources.
- View the service provider assignment.
- View logistical tasks.
- View value-added tax (VAT) and sales and use tax (SUT) information.
- Submit and approve work orders.

Understanding Services Work Orders

This section provides prerequisites and discusses:

- Services work orders.
- Work order status.
- Access to work orders.
- VAT and SUT for services.
- Multi-resource work orders.

Services Work Orders

In PeopleSoft Services Procurement, you can create work orders for resource, deliverable, or multi-resource services that specify the basic terms and conditions of an assignment. Resource-based work orders reflect work that is conducted by a single service provider. Work orders of this nature are logged against the total hours worked. Deliverable-based work orders or request for proposal (RFP) work orders are work orders that reflect work generally conducted by an entire work team. Progress on deliverable-based work orders is logged against an entire project, not just the hours worked by a single service provider.

Because there is not a specific service provider as part of deliverable-based work orders, a statement of work defines the requirements. The rate and the unit of measure (UOM) are not applicable for deliverable-based work orders, so the user enters a work order amount instead of rate information. Multi-resource work orders reflect work performed by multiple individual providers as part of an overall project. These work orders consist of a higher-level parent work order with associated lower-level individual services, and child work orders associated to those individual services.

After a service requisition is created, sourced, and filled, use work orders to document explicit terms agreed upon by you and the service supplier. The service provider or service provider contact logs time or progress, respectively, against the work order.

Work order functionality in PeopleSoft Services Procurement includes the following capabilities:

- Generate a work order from a filled requisition.
- Manually create a work order and link it to an approved or sourced requisition.
- Manually create a work order that is not related to a requisition.
- View tax information.
- View and run the logistical tasks.
- Route a work order for approval using defined workflow rules.
- Track and monitor for eligible service providers.
- Reassign a work order to another service provider.
- Extend the duration of a work order and track the related rate changes and approvals for the extension.
- Adjust the rate on a work order using effective dates.
- Link a work order to a purchase order using the Quick Source process.
- Control expenditures to ensure that a work order does not exceed the agreed amount.
- Notify a service provider or service provider contact that the work can begin.

Note. If you have already selected a service provider, you can create a work order without creating a requisition.

See Also

"PeopleSoft Services Procurement Preface," page xxiii

Chapter 19, "Managing Time in PeopleSoft Services Procurement," page 477

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Logistical Tasks, page 97

Work Order Status

Throughout the work order process, it passes through various work order management phases. The following are valid work order statuses:

- *Open:* The new work order is created.
- *Submitted:* The work order is submitted for approval.
- *Approved:* The work order is approved.
- *Released:* The linked purchase order has been dispatched.

  Time or progress can be logged against the work order.
- *Cancelled:* The requester or service coordinator cancels the work order.
- *Closed:* The work order is closed.
- *Denied:* The work order is denied for approval.
- *Terminated:* The work order is terminated prior to the expected end date.
- *Finalized:* All time or progress is recorded and invoiced.

  Any associated purchase order is reconciled with the work order.

Time, progress, and expenses cannot be logged past the projected end date of a released work order or the actual end date of a closed, cancelled, or terminated work order. After a work order is finalized, a service provider or service coordinator can no longer log time, progress, or expenses against it.

Access to Work Orders

Throughout the work order process, specific role types have access to work order functionality. This table lists the various role types that have access to work orders:

Role Type	***Access***
Requester	Based on permissions, the requester may have complete access to work order functions.
Service Coordinator	Based on the set up on the Service Coordinator defaults page, this person can enter a work order, extend a work order, or delegate requisition sourcing.
Logistical Task Assigned To	This user can only view assigned logistical tasks associated with the work order.
Work Order Approver (dynamically assigned based on workflow rules)	This user has access to change the work order approval details only.

Role Type	*Access*
Service Provider Contact	The service provider contact has view access for the work order and authorization for assigning service providers for deliverable work orders with tracking enabled.

VAT and SUT on Services

VAT is a governmental consumer sales tax, a straight percentage that is added to the cost of a good or service. At each step in the supply chain, VAT is calculated by multiplying the cost of the good or service by the tax rate, charged by the seller to the buyer. While at each step in the supply chain except the last, the buyer can normally recover the VAT incurred. Thus, the liability for VAT is essentially the value added at each step in the supply chain.

SUT is a governmental retail sales tax, a straight percentage that is added to the cost of a good or service. Normally, everyone but the final consumer is exempt from this tax. Sales tax is charged, collected, and remitted to the government by the retailer, while use tax is not handled by the retailer, but still due to the government, and must therefore be self-assessed and remitted by the purchaser.

The major difference between VAT and SUT is that almost everyone pays VAT and recovers the VAT they paid except the end consumer, whereas only the end consumer pays SUT. Everyone in the middle of the supply chain is exempt from SUT.

The PeopleSoft tax tables require you to define:

- Tax authorities, which contain individual tax rates and accounting information used to post the tax liability to a general ledger.
- Tax codes, which consist of a group of tax authorities.

The system calculates VAT and SUT when you create a work order. This enables you to estimate VAT and SUT charges at an earlier stage in the supply chain, so that you have a more accurate understanding of the final amount. The system triggers SUT and VAT defaulting and calculations when you save the work order. If PeopleSoft Services Procurement is integrated with PeopleSoft Purchasing, the system copies VAT and SUT codes and percentages as a default from PeopleSoft Purchasing purchase order to the PeopleSoft Services Procurement work order upon work order release.

See Also

PeopleSoft Supply Chain Management Integration 9.1 PeopleBook, "Integrating with Sales and Use Tax Applications"

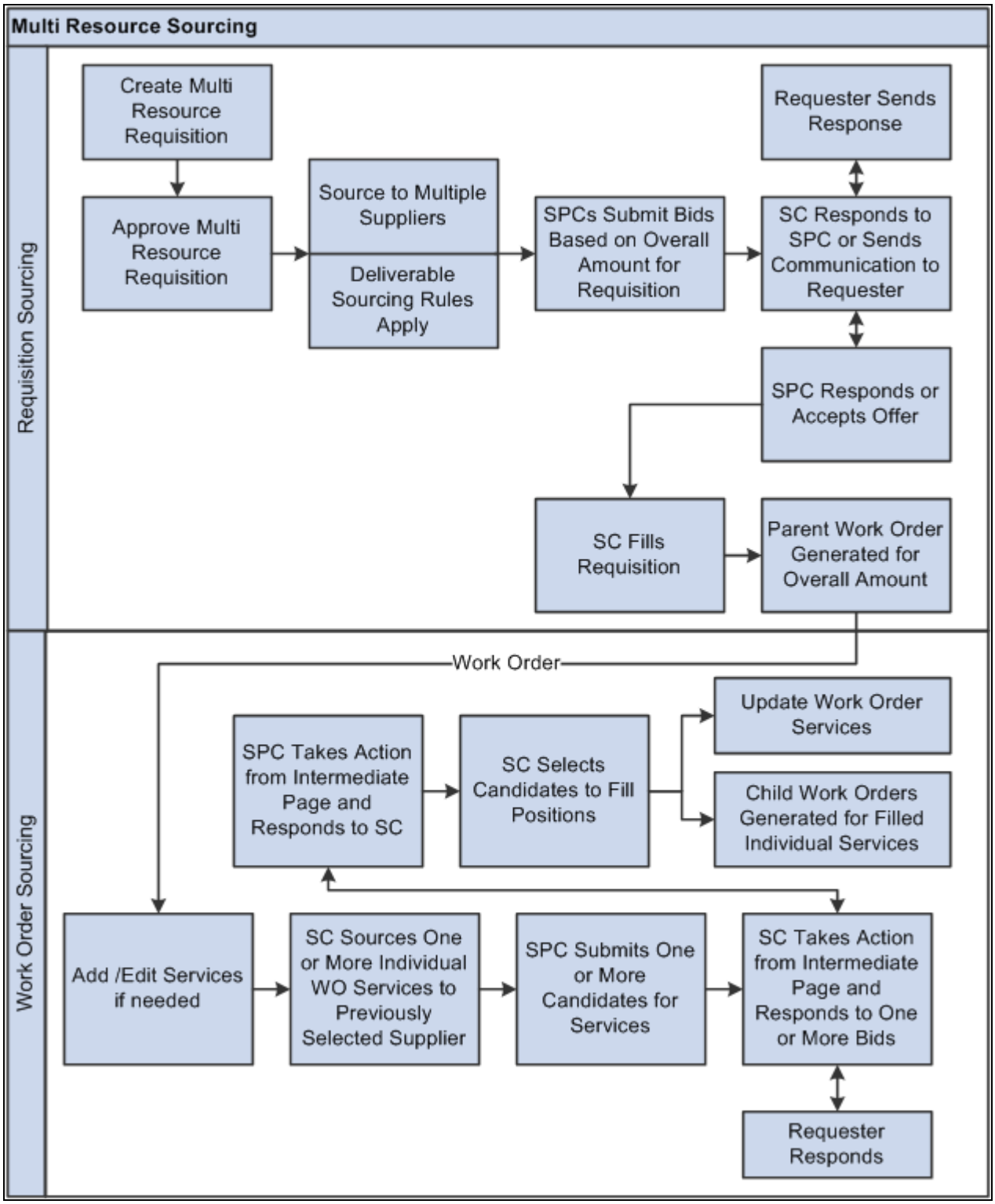
Multi-Resource Work Orders

You use multi-resource work orders to manage multiple individual services that are related to a common assignment and share a common overall approved amount. You can link the parent multi-resource service to a requisition and fill it through the requisition sourcing process or create it manually. These individual services can be passed from a related requisition or added and maintained directly on the work order.

You can source these individual services through the work order sourcing process or generate a related-child work order manually. The system records time and expenses against child work orders, but tracks all consumption at both the child work-order level and the parent work-order level. The system places a maximum amount (cap) on the time and materials amount for an overall project that consists of multiple individual services.

PeopleSoft Services Procurement sourcing is accomplished using two steps. The first step of the two-step process sources the parent service from the requisition line with the necessary details about the services and identifies the supplier who will perform the service. The second step is to source the related individual services from the work order to the supplier who is selected in the first step. You cannot change the supplier after the parent requisition line is filled.

The next diagram illustrates how a multi-resource requisition flows through sourcing or can be associated with a work order for sourcing:



Sourcing multi-resource requisitions

A multi-resource requisition flows through sourcing and can be associated with a work order for sourcing. During requisition sourcing, the system fills the parent requisition line before the services are sourced to the vendor. Similar to a deliverables-based requisition, additional details about the services are under the parent line. The service coordinator has to source the parent line to suppliers first. Vendors are setup based on the parent service type. Vendor selection rules are the same for the requisition as a deliverables-based requisition.

After the parent requisition is filled or closed, the service coordinator can then source the requisition service lines one at time or in combination. Sourcing parameters such as, notification and submittal limits, are brought in as default values from the parent line. Service coordinators can access individual services to modify the parameters for a service line.

Prerequisites

Before you can create a work order, the following conditions must be met:

- If selecting a requisition line on the work order, the requisition line status must be *Approved* or *Sourced.*
- The requisition must be filled for automatic work order generation from the sourcing and bid pages.
- A supplier network must be defined for the business unit.
- Projects must be defined if Project Costing is installed.
- Activities must be defined.
- Service types and services must be defined.

To create the logistical tasks associated with the work order, you should:

- Define tasks.
- Define a task group.
- Associate tasks with the task group.
- Associate the task group with existing service types.

Creating and Managing Work Orders

This section provides an overview of the work order process flow and discusses how to:

- Manage service work orders.
- Define and view work order details.
- Maintain work order cost information.
- Maintain work order consumption information.
- Manage work order approvals and alerts.
- Adding comments and attachments to work orders.
- Defining work order survey information.
- Use work order services.
- View shifts associated with services.

- View assignments associated with services.
- Define individual service details for work orders.
- Assign resources to multi-resource services.
- Extend individual services on multi-resource work orders.

Understanding the Work Order Process Flow

Here is an overview of the steps in the work order process flow:

1. Access the Manage Services Work Order page to manually create a service work order.

   Note. You can click the generate work order button from the Bid Response page, the Assess and Award Bids page, or the Requisition Line Position Details page for a filled requisition line to automatically generate a service work order.

2. For manually created work orders, enter the business unit, work order ID, and service type in the Add New Work Order group box on the Manage Services Work Order page.

   Note. The Service Type field determines whether the work order is resource-based or deliverables-based.

3. For manually created work orders, click the Add button to access the Maintain Service Work Order page.
4. Enter the required information on the Maintain Services Work Order page.

   If you create a work order that is tied to a requisition, many fields (such as Start Date and End Date, Project, Service Provider, and so forth) appear by default from the original requisition. In addition, you must enter data in the Invoice Approver and Time Approver or Progress Log Approver and Expense Approver and Progress Log Template fields.

5. Save the page.

   If your system is set up to share tasks with Microsoft Outlook, when you create a work order and save it, the associated tasks are queued up in the Desktop Integration queueing tables and sent to Outlook. When a task is in Outlook, the Outlook user can carry out the task and change the status of the task or delete it. Changes made in Outlook are synchronized in PeopleSoft Services Procurement and you can view the status on the View Task Checklist and View Task Detail pages. Likewise, the Services Procurement user can carry out the task and change the status. Changes that are made in Services Procurement are synchronized in Outlook.

   When a task is deleted in Outlook, the Deleted in Outlook check box on the View Task Checklist page in Services Procurement is selected, indicating that it has been deleted. A task that is deleted in Outlook is not sent back to Outlook, but the user in Services Procurement can still carry out the task.

   A task can be assigned to another user only in Services Procurement. You do this using the Assign To check box on the View Task Detail page. When this happens, the task is deleted in Outlook and a new task is created in Services Procurement and sent to Outlook with the new user assigned.

6. Click the View Task List link on the Maintain Services Work Order page to ensure that all mandatory preapproval logistical tasks are complete.

7. After all mandatory preapproval logistical task are complete, click the Submit button on the Maintain Services Work Order page.

   Upon submittal, the work order submittal page displays approval information and the work order status changes to *Submitted* or *Approved,* if the work order creator has sufficient authority to approve work orders or the work order approval process is not used for the business unit.

8. After a work order is submitted for approval, it is routed to the work order approver as defined by the workflow rules.

   There can be more than one approver for each work order, depending on the number of approvers set up in the workflow rules. A new task item appears on the approver's worklist indicating that the work order needs approval. An email notification is sent to the approver's in box. Once approved, the work order status changes from *Submitted* to *Approved.*

   See Chapter 8, "Setting Up PeopleSoft Services Procurement Workflow," page 227.

9. Access the Services Work Order Roster page, and locate the approved work order.

   Click the Edit Work Order button on the Work Order Roster page to update the approved work order.

10. (Optional) Click the View Task List link on the Work Order - Details page to verify that all postapproval logistical tasks are complete.

    You must complete all post approval tasks before releasing the work order.

11. If purchase orders are integrated with work orders, click the Process Purchase Order button on the Maintain Services Work Order page to complete purchase order distribution and accounting information, and then click the Quick Source link on the Cost tab to build the purchase order automatically.

    Note. The Quick Source link appears for manually created work orders, as well as work orders that are associated with requisitions.

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12. Click the button next to the created purchase order ID to verify that the purchase order has been approved, budget checked, checked for doc tolerance, and dispatched.

    Use the purchase order page to perform these actions.

13. After the purchase order has been dispatched, you can release the work order by clicking the Release button.

Note. If password security is not enabled, a user profile will be created automatically upon release of the work order if one does not already exist.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Integration for Work Order Logistical Tasks with Microsoft Outlook, page 99

Chapter 18, "Managing Work Orders," Viewing Task Checklists, page 459

Pages Used to Create and Manage Work Orders

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Services Work Orders	SPF_WORDER_ROSTER	Services Procurement, Manage Services Work Orders	Manage services work orders.
Work Order - Details	SPF_WO_REQ_VEN_DT	Services Procurement, Manage Service Work Orders Click the Add button on the Manage Services Work Order page. Click a Work Order ID link on the Manage Services Work Order page.	Define and view work order details.
Work Order - Cost	SPF_WO_COST_PO_PG	Services Procurement, Manage Services Work Orders, Work Order - Service Select the Cost tab.	Maintain work order cost information.
Work Order Cost Consumption	SPF_WO_COST_CONSUM	Services Procurement, Manager Services Work Orders, Work Order - Service Select the Consumption tab on the Work Order page.	Maintain work order consumption information. **Note.** This only appears once the work order is released.
Work Order - Approvals and Alerts	SPF_WO_APPROVER	Services Procurement, Manage Services Work Orders, Work Order - Service Select the Approvals and Alerts tab.	Manage work order approvals and alerts.
Work Order - Comments	SPF_WO_COMMENTS	Services Procurement, Manage Services Work Orders, Work Order - Service Select the Comments tab.	Adding comments and attachments to work orders.

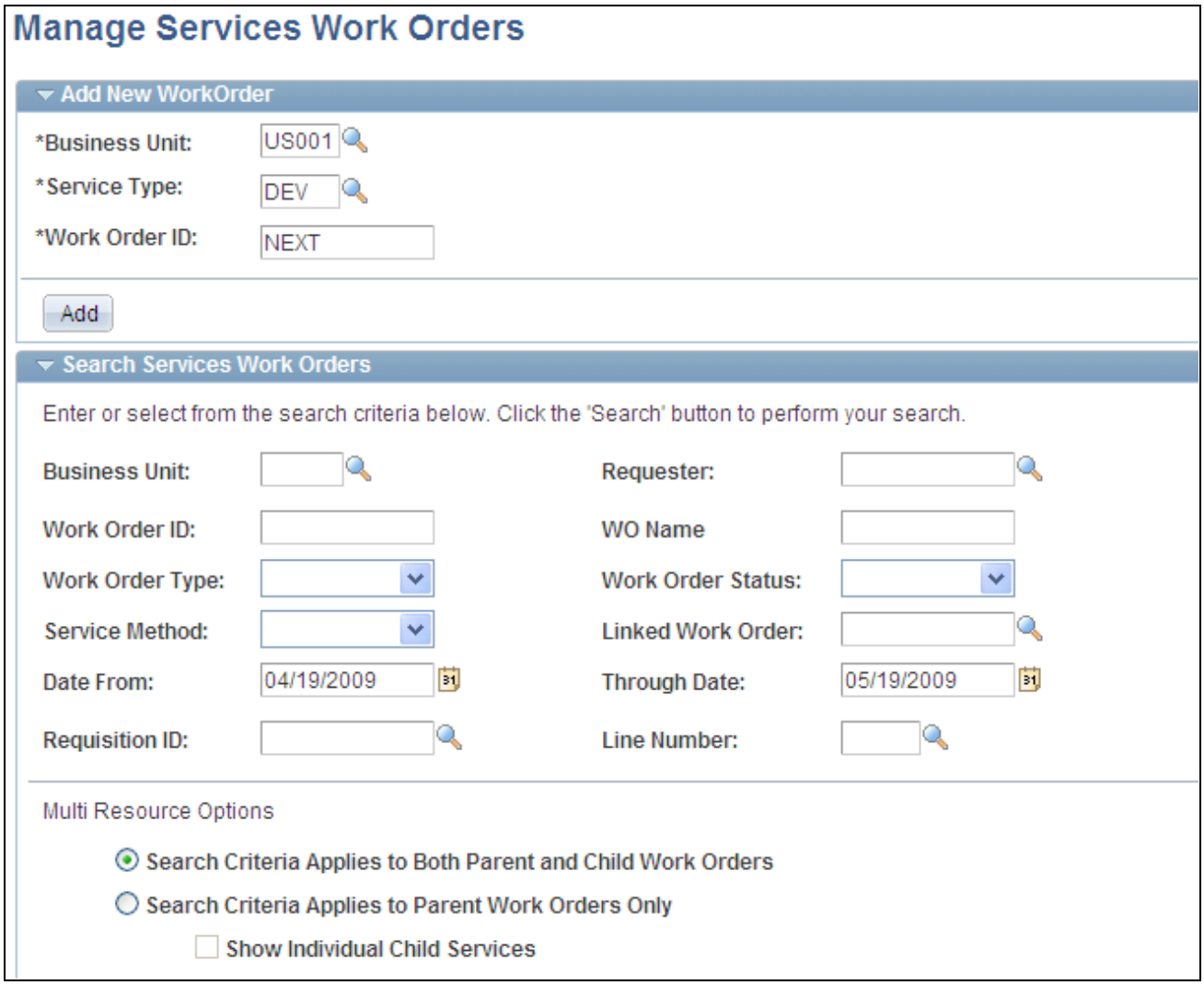
Page Name	*Definition Name*	*Navigation*	*Usage*
Work Order - Surveys	SPF_WO_SUR_USR	Services Procurement, Manage Services Work Orders, Work Order - Service Select the Surveys tab.	Enter work order survey information. **Note.** The Survey tab is available only if the *Using Surveys* option is enabled for the business unit and the work order is saved.
Work Order - Service Summary	SPF_WO_SRVC_SUM	Services Procurement, Manage Services Work Orders, Work Order - Service Click the Service Summary tab.	Use work order services.
View Shifts for Service	SPF_SHIFT_BY_SRV	Services Procurement, Manage Services Work Orders, Work Order - Service Click the View Shifts for Service link at the bottom of the work order.	View any shifts associated with this service.
View Assignments for Service	SPF_ASGN_BY_SRV	Services Procurement, Manage Services Work Orders, Work Order - Service Click the View Assignments for Service link at the bottom of the work order.	View any assignments associated with this service.
Track Resources	SPF_WO_TRK_RSRC	Services Procurement, Manage Services Work Orders, Work Order - Service Click the Track Resources link at the bottom of the work order.	Add and track new services providers for deliverable services.
Progress Log Activity	SPF_PRGLOG_MS_PG	Click the Activities link on the Work Order - Cost page.	View activities associated with a progress log for deliverable services.
Work Order Rates	SPF_WO_PAYRATE	Click the Enter Effective Dated Rate button on the Work Order - Cost page.	(Optional) Update the work order rate by effective date.

Page Name	*Definition Name*	*Navigation*	*Usage*
Service Work Order History	SPF_WO_HISTORY	Click the Work Order History button on the Manage Services Work Order page. Click the Work Order History link at the bottom of the Work Order - Service page.	View status and approval changes, including the service coordinator or team that was assigned to the work order at the time history was recorded.
Services Work Order Template History	SPF_WO_TE_TEMPLATE	Click the Time Template History link on the Work Order - Cost page.	View templates that were linked to the work order.
Document Attachment	SPF_WO_ATTACH	Click the Statement of Work link at the bottom of the Work Order - Service page.	Upload file attachments for a work order.
Quick Source	PV_RUN_REQSORC_1	Click the Quick Source link on the Work Order - Cost page.	Run the process that creates purchase orders related to work orders. **Note.** This process is only accessible if purchase orders are integrated with work orders.
Maintain Purchase Orders	PO_LINE	Click the Purchase Order button on the Maintain Services Work Order - Cost page.	Access the purchase order where you can run commitment control, check doc tolerance, and dispatch purchase orders. **Note.** This process is only accessible if purchase orders are integrated with work orders.
Work Order Approval Status	SPF_WO_APPR_STATUS	Click the Work Order Approval Status button on the Manage Services Work Order page.	View work order approval information. **Note.** The work order approval button is only accessible if the *Enable Approval Process* option is enabled for the business unit on the work order tab.
Work Order Activity	SPF_WO_ACTIVITY	Click an Activity link on the Work Order - Cost page.	Identifies the activities associated with a resource-based work order.

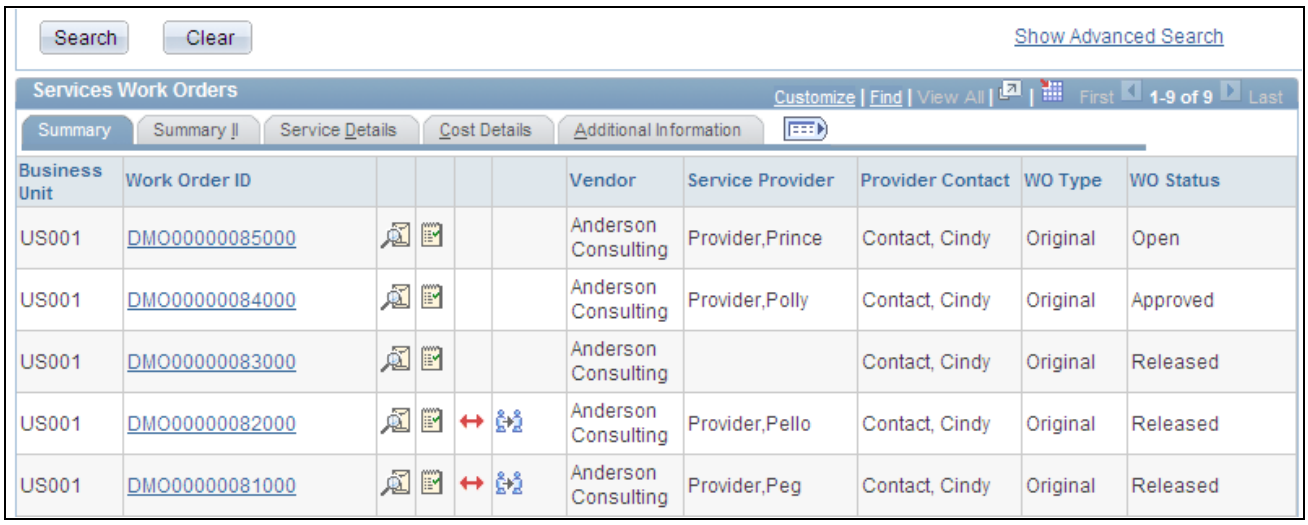
Page Name	*Definition Name*	*Navigation*	*Usage*
Bid Factors by Work Order	SPF_WO_BIDFACTR	Click the Scoring Criteria link on the Manage Services Work Orders - Details page.	Displays bid factors associated with a resource-based work order, including bid factor code, weighting, and activity.
Timesheets by Work Orders View	SPF_TIMEBYWO_VIEW	Click an Activity link on the Work Order - Cost page.	Displays the timesheets related to a specific work order.
Identify Work Order Services	SPF_WO_SERVICE_DTL	Services Procurement, Manage Services Work Orders After completing the work order search, click the Work Order ID link, select the Service Summary tab, and click the Add New Service button.	Define individual service details for work orders. **Note.** The Services tab applies only to multi-resource work orders, and is not available for resource or deliverable work orders.
Select Services for Extension	SPF_WO_EXT_SRV_SEL	Services Procurement, Manage Services Work Orders After completing the work order search, click the Extend Work Order link.	Extend individual services on multi-resource work orders.

Managing Services Work Orders

Access the Manage Services Work Order page (Services Procurement, Manage Services Work Orders).



Manage Services Work Order page (1 of 2)



Manage Services Work Order page (2 of 2)

Use the Manage Work Order page as the central location to create, maintain, and extend work orders, including multi-resource service work orders. Use the Add New Work Order group box to create a new work order. Select a business unit and use the Work Order ID field to define a work order ID. The system assigns an ID if you do not enter one.

Note. A service coordinator cannot be the same as the service provider, and a service coordinator cannot access work orders for which he is the service provider or service provider/coordinator.

The content and use of the work order depends on the value you select in the Service Type field. You can select a service type that is based on a deliverable-, multi-resource-, or resource-based service method. Each of these methods has a different function for a work order.

After you enter the work order information, click the Add button to enter details about the work order. If you are creating a multi-resource work order, use the Services Summary tab to define default services or add a new service.

Note. The monetary amount appears only if you are a requester and have View or Define and View requester rate access for the business unit or if you are a service coordinator.

Search Services Work Orders

Use the Search Services Work Orders group box to streamline the search results for the work order. After you enter the search criteria, go to the roster area where you can edit, establish workflow, and cancel work orders. You can search for work orders based on a business unit, requester, work order ID, and work order name.

Note. Search results display only the top-line information for multi-resource transactions. When you expand the top-line work order ID, the system displays the corresponding services line details.

Note. If row-level security has been implemented for the business unit and permission list, you must enter a business unit before you can search for a requester using the Look up Requester button.

Work Order Type	Select a type of work order on which to base the search. Work order types determine the logistical task group and logistical tasks that are associated with the work order. Values include: *Original,Extension,Replaced,* and *Reassigned.*
Work Order Status	Select a work order status on which to base the search. The status is the work order's life-cycle stage. For example, *Open, Submitted,* and *Closed* are stages.
Service Method	Select the service method on which to base the search. Values include: *Deliverable, Multi Resource,* and *Resource.*

Linked Work Order	Select to base the search on a linked work order. This is a work order to which another work order has been linked by either extending, reassigning, or replacing the existing work order. **Note.** Linked work orders that are associated to multi-resource services do not display in the search results. Use the multi-resource search criteria instead.
Date Fromand**Through Date**	Select a range of creation dates on which to base the work order search.
Requisition ID	Enter a requisition ID on which to base the search.
Line Number	Select a requisition line number on which to base the search.
Search Criteria Applies to Both Parent and Child Work Orders	Select to indicate that the search should include all lower-level individual service work orders related to a multi resource work order along with the top-line parent work order. This button applies only to multi-resource work orders. When you select this option, the system retrieves only child work orders if the child work order itself meets the search criteria that you select.
Search Criteria Applies to Parent Work Orders Only	Select to indicate that the search should include only the top-level parent work orders for multi resource services. This button applies only to multi-resource work orders. If you select this button, the system makes the Show Individual Child Services available. The system uses the criteria that you select to retrieve applicable parent work orders.
Show Individual Child Services	Select to display lower-level individual service work orders related to selected multi resource work orders in the search results. This check box applies only to multi resource work orders and is available when you select to search parent work orders only. It determines whether the system retrieves related-child work orders for those parent work orders that were selected. In this case, it doesn't matter whether the child work orders also meet the specified search criteria. If the parent work order meets the criteria and it is selected to show children, the system retrieves the children regardless.
Show Advanced Criteria	Click to view more search fields, including Survey ID, Vendor ID, Coordinator,Service Provider, Service Team, and Provider Contact.

Services Work Orders: Summary Tab

Use this tab to review basic information for work orders that the system retrieves based on your search criteria.

	Click to access the Services Work Order History page, where you can view a summary and history of the work order.
	Click to access the Service Work Order - View Task Checklist page, where you can view the logistical tasks for the work order.

Click to access the Work Order Approval Status page, where you can review the work order approval information.

Click the Extend Work Order button to extend the duration of the work order. This button appears only for resource- and multi-resource-based work orders. When you click the system displays the Service page, where you can enter a new end date for the work order. Logistical tasks that are associated with the work order type are used are associated with the new extended work order.

A new purchase order amount associates with the extended work order, which requires additional approval.

For multi-resource services, the system extends the top-line work order, along with all open individual child service work orders. Any individual service filled from the original parent work order after the extension has been created can be extended by using the Select Services for Extension page to create new work orders to extend the individual service work orders

Click the Assign New Resources button to assign a new service provider to the work order either by manually replacing the service provider or going through the fulfillment process.

Note. Click this button to access the Maintain Services Work Order page, where you can enter a new start date and select a new service provider for the work order.

You can assign new resources to resource-based work orders only.

Summary II

Use this tab to view and access additional information about the work that includes the projected start and end dates. Other fields on this tab are the same as the field on the Summary tab.

Service Details

Use this tab to view and access additional information about the work order. This information includes the service method, such as multi resource, service type, service and job title. Other fields on this tab are the same as for the Summary tab.

Cost Details

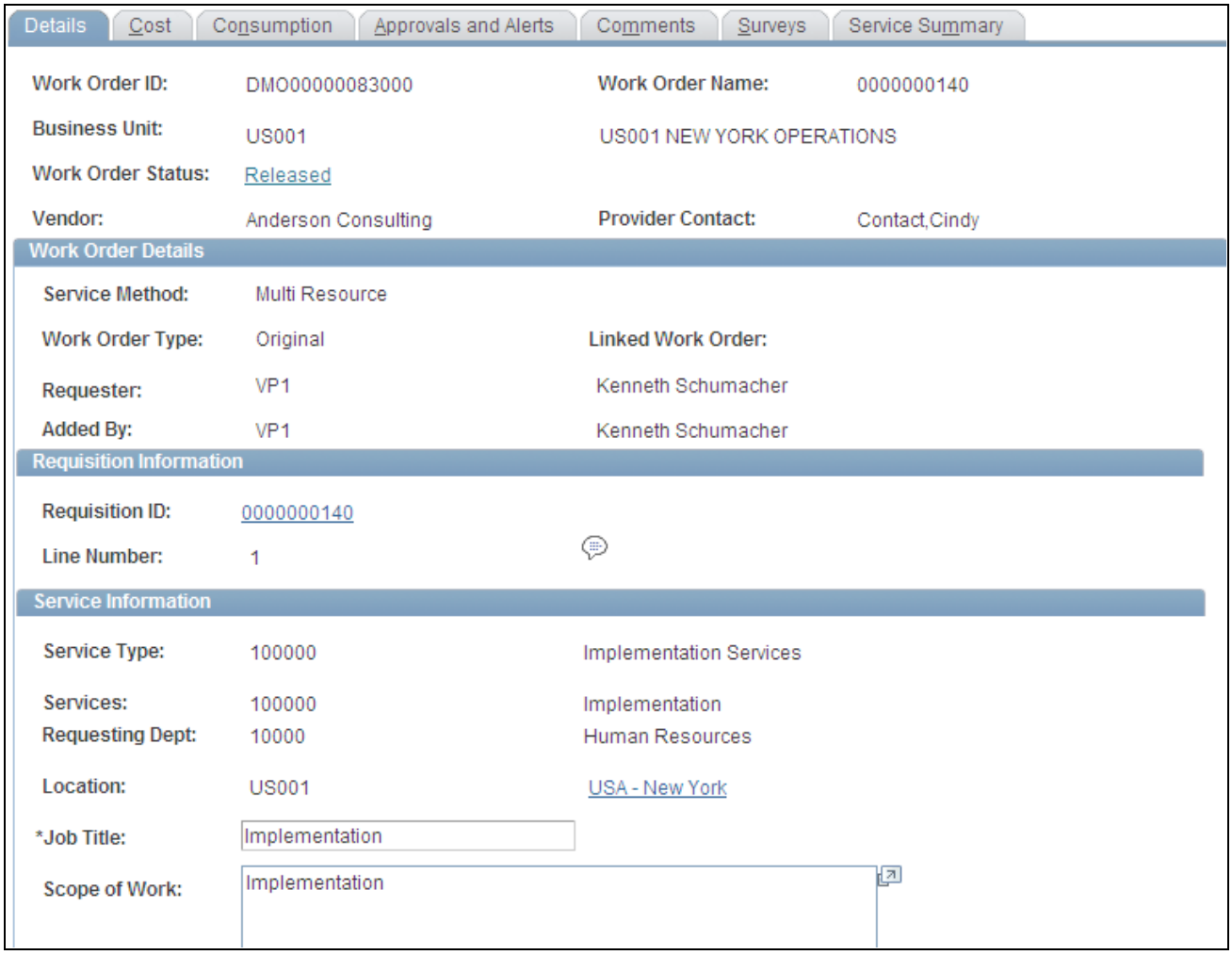
Use this tab to view and access additional information about the work order. Information on this tab includes the loaded rate, work order amount, and purchase order status.

Additional Information

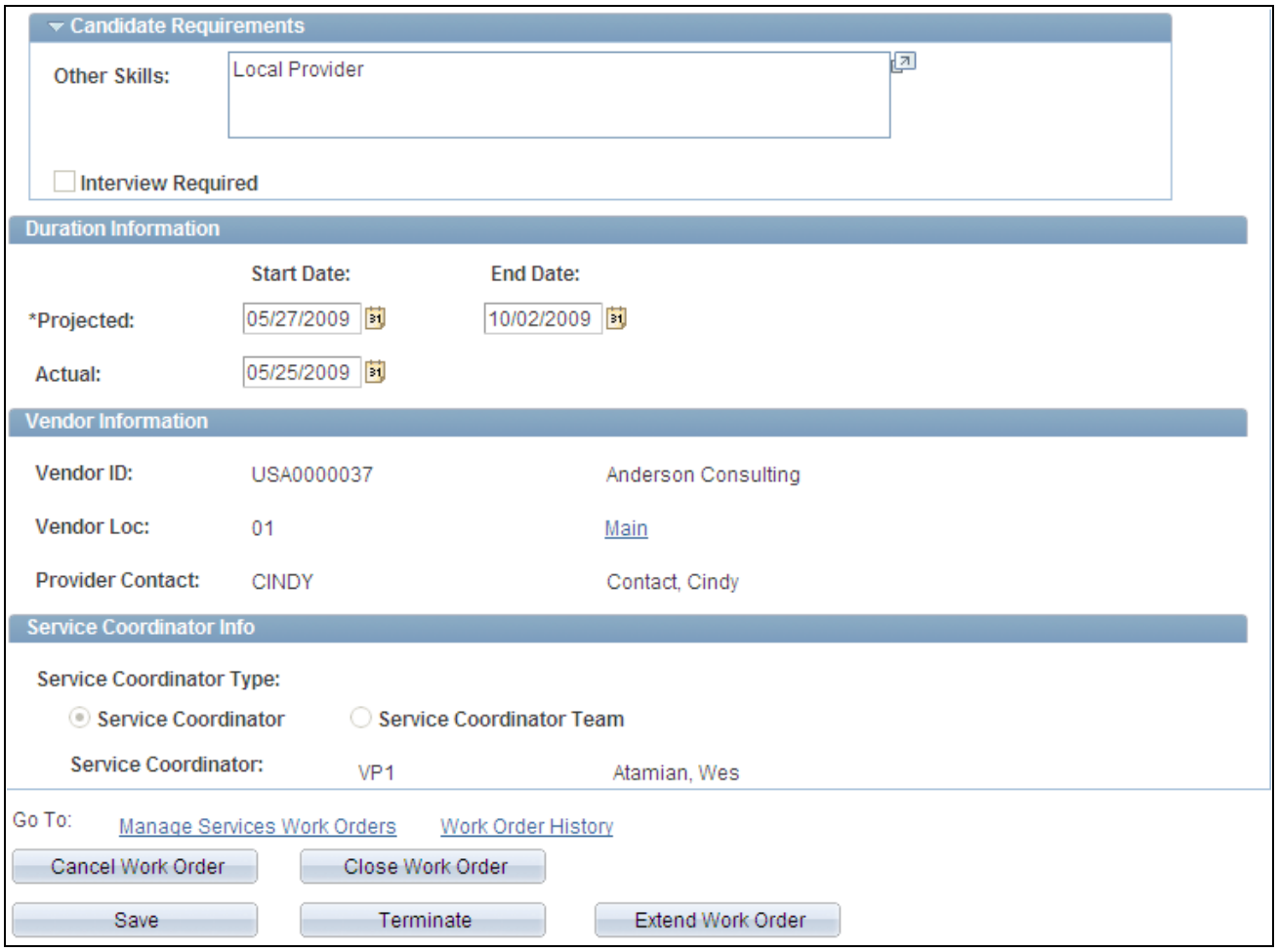
Use this tab to view and access more details about the work order. that includes the projected start and end dates. You can view the requester, service coordinator, team, and survey ID. The tab provides the work order creation date and who created it. Also available is the parent work order ID and the sub line.

Defining and Viewing Work Order Details

Access the Work Order - Details (Services Procurement, Manage Service Work Orders, click the Work Order ID link).



Work Order - Details page (1 of 2)



Work Order - Details page (2 of 2)

Work Order ID Displays the unique work order ID that is assigned when you create a new work order.

Work Order Status Displays the status of the work order. Values are:

- *Open*
- *Submitted*
- *Approved*
- *Released*
- *Canceled*
- *Closed*
- *Denied*
- *Terminated*
- *Finalized*

Work Order Name

Enter a descriptive name for the work order. The requisition name (if one is associated with the work order) or to the work order ID is the default value.

Work Order Details

Service Method

Displays the service method of *Deliverable Based*, *Multi Resource*, or *Resource Based.*

Note. The service method is determined by the service type selected in the Add New Work Order group box.

Work Order Type

Displays the work order type. Work order values are *Original*, *Extension*, *Replaced*, or *Reassigned.*

Note. Work order types determine the logistical task group and logistical tasks that are associated with the work order. Preapproval and postapproval logistical tasks are determined by the work order type values.

Linked Work Order

Displays a linked work order. A new work order is linked to an existing work order by either extending, reassigning, or replacing the existing work order. When you extend, reassign, or replace an existing work order, information from the original work order appears by default on the new work order.

Requisition Information

Requisition ID

(Optional) Enter the requisition ID associated with the service work order. The requisition line must have a status of *Approved* or *Sourced.*

The system displays links to original sourcing requisitions. Click a Requisition ID link to access the Requisition Line Job Summary page for that requisition.

Note. You can generate a work order from filled requisitions by clicking the Work Order button on the Requisition Details page or Assess and Award Bids page.

Line Number

Enter the requisition line number. When you link a requisition line, information from that line appears by default on the work order. Some of that information is not editable on the work order.

Service Information

Service Type

Displays the service type selected in the Add New Work Order group box.

Note. This can only be changed to a service type with the same service method.

Services

Select the specific service to be performed, for example, *Program Manager* or *Java Developer*. The services are linked to the service type on the Services by Service Type page.

Track Resource

Select this check box if this is a deliverable service method work order and you want the service provider resources to be included on the work order.

Requesting Dept (requesting department)

Select the requesting department which must be a valid HCM department (if HCM is enabled on the Services Procurement installation); otherwise select a valid department for PeopleSoft Financials/Supply Chain Management.

Location

Enter the ship to location for the work order. The ship to location appears by default from the requester defaults.

Job Title

Enter the job title for the work order.

Note. This value defaults from the service attributes.

Scope of Work

Enter free-form comments to describe the type of work that the candidate needs to perform on the work order.

Candidate Requirements

This group box contains various candidate requirements. The default values come from the requisition if there are skills associated with the requisition; otherwise the values come from the competencies associated with the work order.

Competencies

This display-only field is used to screen candidates that do not have the competencies required for the work order.

Proficiency

This display-only field indicates the minimal level that the candidate should possess in order to be qualified for the position.

Note. Proficiency is for informational purposes only

Experience

This display-only column indicates the minimum years of experience the candidate should possess, and is for informational purposes only.

Action

Select *Block*,*No Action*, or *Warn* depending on the action you want to occur if the service provider entered on the work order does not have the required competencies.

Other Skills

Enter any free-form text in this field to indicate additional skills that may be required for the position.

Settlement Options

View the settlement method for a work order, which is based on the service selected. Progress will be recorded based on the method defined. Values include:

- *Fixed Amount*: Progress payments are made against milestone activities where the supplier enters the amount to be paid on the progress logs.

  You can record progress multiple times against the same milestone for work order to allow payment upon partial completion of a activity.

- *Milestone*: Payments are made when agreed upon milestones are met.

  For example, you could agree to pay the construction company 25 percent of the total fee when the foundation is complete. The supplier can only select each milestone activity once for completion.

- *Percentage*: Payments are made based on the percentage of completion for the total work order amount entered on the progress log.

- *Rate Based*: Payments are based on an agreed upon rate for service activities.

  For example, you could agree to pay a contractor pouring concrete a specific rate per cubic foot. For this example, the actual cubic feet poured is entered in the progress log and the payment is based on that agreed rate.

Note. This field applies to deliverable-based work orders only.

Duration Information

Projected

Enter a projected start and end date for the work order. The start date reflects the date when the work is projected to begin. The end date reflects the date when the work is anticipated to end.

Actual

Enter the actual dates when the work begins and ends. You must enter the actual start date before releasing the work order. Enter actual end date after the work order is canceled, terminated, or closed.

Calendar Duration

Displays the number of calendar days from work order start date to the end date.

Note. This option appears for resource-based work orders only.

Estimated Service Days

Displays the total number of service days estimated for the work order. The value can be overwritten and the work order total is recalculated.

Note. This option appears for resource-based work orders only.

Utilization % (utilization percentage)

Enter the percentage of time that the candidate spends in a work week. For example, if the candidate typically works a half day, the utilization would reflect 50 percent. If the candidate will work three days per week, the utilization will reflect 60 percent. The default value is 100 percent.

Note. This option appears for resource-based work orders only.

Overtime Permitted

Select the check box if overtime is allowed for the work order.

Note. This option appears for resource-based work orders only.

Vendor Information

Vendor ID

Enter the vendor ID.

Vendor Loc (vendor location)

Enter the vendor location. If only one location exists for the vendor, it automatically appears on the work order.

Track Resource(s)

Select to track the service provider resources for deliverable-based engagements.

Review Service Provider Eligibility

Click to access the Service Provider Eligibility Review page. You use the page to view service providers that are marked as not eligible and are potential matches to the service provider on the current work order. The system does not allow actual matches for selection. Any potential matches of identifier ID against the selected service provider produces a system warning and provides service coordinators an opportunity to notify administrators if they feel the potential match is a true match.

Service Coordinator Information

VMS Supplier(vendor managed service supplier)

View the name of the supplier who manages third-party vendors performing the services.

Note. This field appears only for work orders that are VMS managed, which is based on the settings for the business unit or service type.

VMS Location(vendor managed service location)

View the supplier location that manages third-party vendor performing the service.

Note. This field appears only for work orders that are VMS managed, which is based on the settings for the business unit or service type.

Service Coordinator Type Determines whether an individual service coordinator or a team is responsible for the work order. If the work order is VMS managed, this field is view only.

Service Coordinator Select the specific individual service coordinator or team assigned to the work order. If the work order is VMS managed, this field is view only.

Links and Other Status Buttons

Links change based on the status of a work order.

Manage Service Work Orders Click to access the Manage Services Work Orders page.

Work Order History Click to view the history for a work order. The history includes summary information, approval updates and date changes for the work order.

Statement of Work Click to access the Document Attachment page, where you can attach files associated with previously created work orders.

Task Check List Click to view logistical tasks that are associated with the work order.

Task Check List Click to view logistical tasks that are associated with the work order.

Bid Attachments Click to access the Bid Attachments page, where you upload attachments to bids.

Process Purchase Order Click to submit the approved work order details to the PeopleSoft Purchasing application. This field is available after the work order has been approved and when PeopleSoft Purchasing integration is selected. Use the Integration Option group box on the eProcurement Business Unit Options page to define this setting.

View Shifts for Service Click this link to access the View Shifts for Service inquiry page. This link is available only if the business unit is enabled to use shifts and if there are any valid shifts by service combinations associated with this work order.

See Chapter 18, "Managing Work Orders," Viewing Shifts Associated with Services, page 451.

View Assignments for Service Click to access the View Assignments for Service inquiry page. This link is available only if the business unit is enabled to use assignments and if there are any valid assignments by service combinations associated with this work order.

See Chapter 18, "Managing Work Orders," Viewing Assignments Associated with Services, page 452.

Scoring Criteria Click to enter bid factors for the service provider contact to respond to and by which the bid score is calculated. This enables the service coordinator to make an informed decision. You can define bid factors at the work order and work order service level.

Cancel Work Order

Click to cancel the work order.

Note. If you cancel the work order, and if the work order is tied to a requisition line, the status of the requisition line is changed to Sourced. After the status of the requisition line is changed to Sourced, the requisition line is available for resourcing to suppliers. An exception to this is the individual child services for a multi-resource parent service. When these child work orders are canceled, the status of the individual service on the parent work order is not reset.

Close Work Orders

Click to close the work order after the service has been completed. The actual end date is specified when the work order is closed and no time or progress may be entered past this date.

Submit

Click to submit the work order for approval.

Note. If the preapproval logistical tasks aren't complete, an error message appears and the status does not change to *Submitted.*

Terminate

Click to terminate the candidate. The work order is terminated prior to the expected date.

Release

Click to release the work order. After the work order is released, the supplier is notified that he can begin to log time or progress logs.

Note. If the postapproval logistical tasks aren't complete, an error message appears and the status does not change to *Released.*

Finalize

Click to indicate that all time or progress is recorded and invoiced. Any associated purchase order is reconciled with the work order.

Extended Work Order

Click to extend the duration of the work order and track related rate, approval, and logistical task changes. This button appears for resource and multi-resource work orders only.

Assign New Resources

Click to assign a different service provider for this work order. This button appears for resource-based work orders only. Depending on the business unit setup, clicking the Assign New Resource button may enable users to choose the option to manually reassign the service provider or go through the fulfillment process.

Note. If you want to reassign resources without using sourcing to a specific service provider, the work order has a type of *Reassign.* If you want to reassign resources using the bid process, it will populate the same work order associated with the requisition and will enable you to source it. Source it to different vendor from the original requisition, then submit the bid, accept and fill, and a new work order type of *Replace* will be created.

See Also

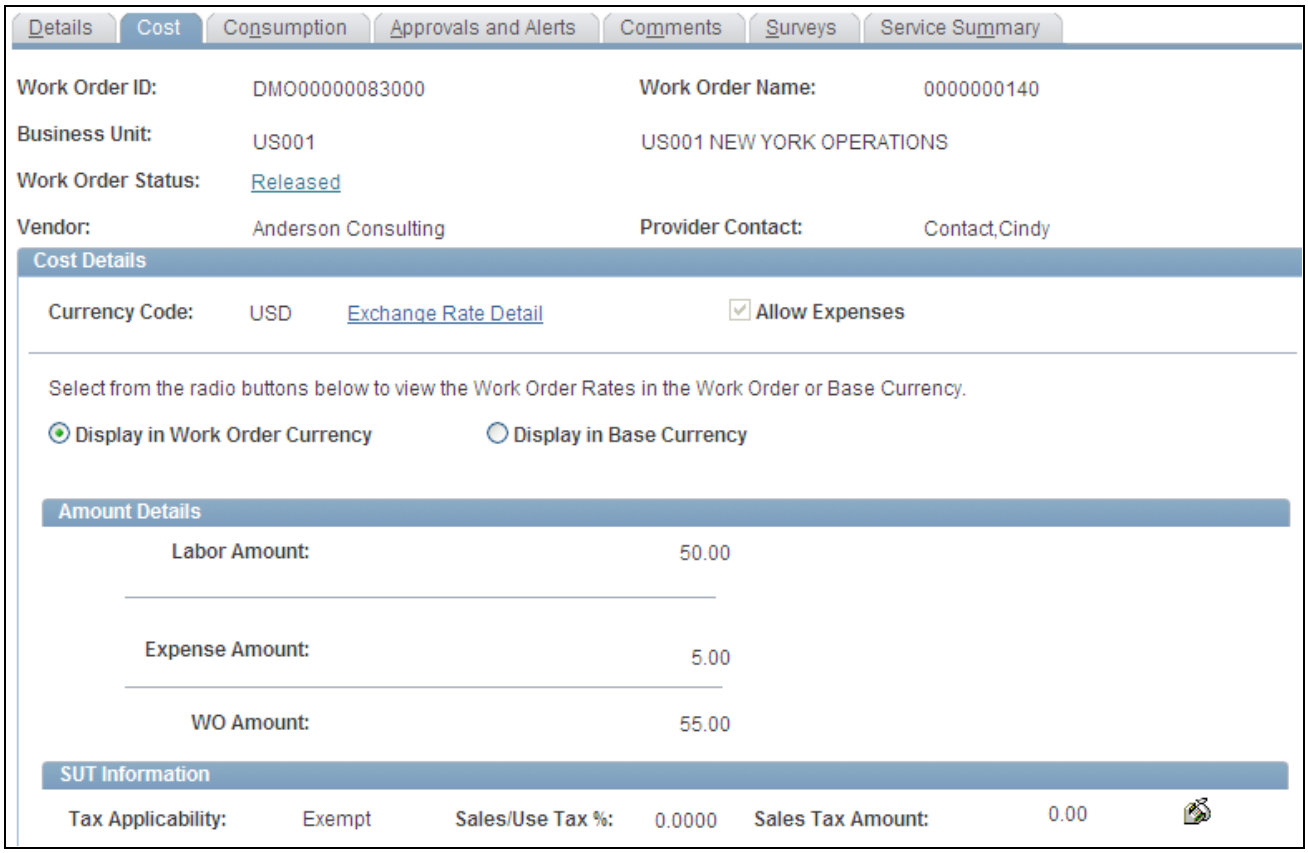
Chapter 21, "Managing Progress Logs," page 545

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," page 79

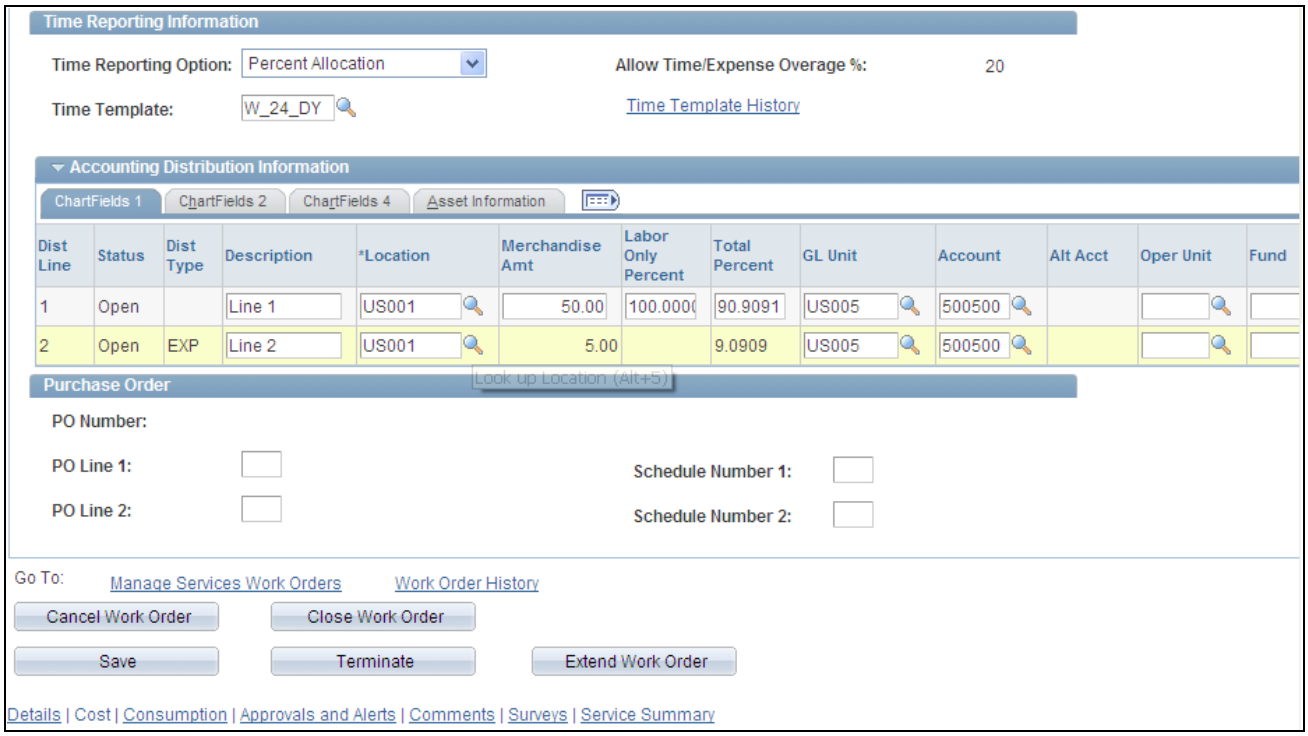
Chapter 22, "Managing Settlements," page 559

Maintaining Work Order Cost Information

Access the Work Order - Cost page (select the Cost tab on the Work Order - Service page).



Work Order - Cost page (1 of 2



Work Order - Cost page (2 of 2)

Note. When you are creating a new work order and ChartField security has been established for work order prompts and fields, the system applies values according to the ChartField security rules and prevents you from entering prompt values that are not valid. Also when you are updating the Cost page, and do not have ChartField security, the system issues a message and does not display protected field values.

If you select the Use Pay Types check box on the Services Procurement Business Unit Options page and if the service method is Resource, then, the system displays the Rate Breakdown group box. Rate breakdowns are not used for work orders when the service method is Deliverable.

If you create a manual work order and rate sheet information is defined, rate breakdown and expense information defaults from the associated rate sheet.

Note. User role actions determine which users can view rate breakdown information.

Manual work orders created by a requester are routed to the service coordinator for rate definition prior to approval if the rate definition for the business unit is set to not allow rate definition for the requester.

Cost Details

Currency Code Displays the currency code associated with the work order.

Exchange Rate Detail Click the Exchange Rate Detail link for currency and exchange rate information.

Allow Expenses

Select to report expenses for work orders. When you select to allow expenses, you must enter an expense rate and amount. The system provides a warning message that indicates the Allow Expenses check box is selected, but an expense-related rate and amount have not been entered.

Note. This check box is only available if the SP Expenses Enabled check box is selected on the Services Procurement Installation Options page.

Although this setting defaults from the Services Procurement Business Unit page, you can override it here.

Display in Work Order Currency and **Display in Base Currency**

Toggle between Work Order and base currency.

Select Display in Work Order Currency to view the currency code and rate in the work order currency.

Select Display in Base Currency to view the currency code and rate in base currency.

Rate Details

Pay Rate

Enter or view the amount that is paid to the service provider. The rate detail fields do not apply when the service method is deliverable or multi-resource.

Note. This option appears when the pay types option is enabled on the Services Procurement Installation Options page.

Fixed Cost

Enter or view additional amounts that are used to cover fixed costs of the supplier related to providing the service.

Note. This option appears when the pay types option is enabled on the Services Procurement Installation Options page.

Vendor Markup

Enter or view markups charged by the supplier for providing the resources to perform the service.

Note. This option appears when the pay types option is enabled on the Services Procurement Installation Options page.

Third Party Markup

Enter or view additional markups that are charged when the supplier secures resources from a subcontractor.

Note. This option appears when the pay types option is enabled on the Services Procurement Installation Options page.

Total Markup Rate

Displays the total markup rate. The system adds the Pay Rate,Fixed Cost, Vendor Markup, and Third Party Markup fields to determine this value.

Note. This option appears when the pay types option is enabled on the Services Procurement Installation Options page.

Rate

Enter the rate of pay associated with the work order when pay types are not enabled. You can view the rate of pay when pay types are enabled. Modifications to the rate amount are validated against rate sheets defined for the project role and region. If you enter a rate amount that is out of tolerance withe rate sheet, you receive either an error or a warning message.

Click to enter effective-dated rate. When time is logged against the work order, the rate effective for the time period is used to calculate the timesheet amount.

Note. When a requisition is filled and a work order is created, there may be two entries in the effective-dated rate. The first entry is for the requisition rate and the second rate is the filled rate. This provides visibility of the rate history and enables comparison.

If the rate is increased, the work order amount may be consumed at a quicker rate. An extension may need to be created if the amount is consumed before completion of the work order.

UOM (unit of measure)

Enter the unit of measure associated to the defined rate, or select a unit of measure from the list of available values.

Expense Rate

Enter the rate allowed for expenses.

Amount Details

Labor Amount

Displays the total amount calculated for labor. It does not include any tax values and is updated when a new time report is entered.

VMS Fee(vendor managed service fee)

Displays the total amount calculated for the vendor managed services fees.

Note. This value only appears for work orders that are VMS managed.

Loaded Amount

Displays the sum of the labor amount and the VMS fee.

Expense Amount

Displays the total amount of expense calculated for the work order. The system calculates the expense amount as the work order rate multiplied by the work order duration.

WO Amount(work order amount)

Displays the total amount for the work order, including labor, expense, and any applicable VMS markup.

Note. You can edit the Expense Rate, UOM, and Amount fields only if the requisition is not associated with a work order. If the work order is associated with a requisition, the values appear by default from the requisition and can only be viewed.

The work order total calculation does not include any amounts for shift or assignment pay.

SUT Information and VAT Information

Tax Applicability	Displays SUT applicability for this work order.
Sales/Use Tax % (sale and use tax percent)	Displays the total SUT percentage.
Sales Tax Amount	Displays the total taxable amount.
VAT Percent	Displays the total percentage for all VAT authorities included for the VAT code.
VAT Entity	Displays the entity in the organization that reports VAT. The VAT entity is determined from the PeopleSoft General Ledger business unit associated with the PeopleSoft Purchasing business unit. If an entry exists for the PeopleSoft General Ledger business unit, then VAT calculations are performed on the work order. If not, VAT fields are hidden on the work order.
VAT Amount	Displays the VAT amount charged in the transaction line currency.

Time Reporting Information

Time Reporting Option	The time reporting option indicates whether actual allocation or percentage allocation is used for recording time against the work order. If actual allocation is selected, the service provider must specify which ChartField distribution line the time is associated with. If percentage allocation is selected, time is prorated automatically across all ChartField distribution lines based on the percentage of the work order labor total for each line.
Time Template History	Click to access the Services Work Order Template History page, where you can view the history of the time template.
Activities	Click to access the Activities page, where you can view activities associated with the work order.

See Chapter 19, "Managing Time in PeopleSoft Services Procurement," page 477.

Accounting Distribution Information

Use this section to enter and review distribution information.

Amount

Enter the amount that is to be charged to a particular ChartField combination.

Note. Changes to the labor percentage or total percentage triggers an automatic recalculation of the distribution line amount.

Labor Only Percent

Enter the labor percent allocation for the requisition line that is charged to a ChartField combination.

Note. Changes to the total percentage or amount triggers an automatic recalculation of the labor percentage for the distribution line.

Total Percent

Enter the percent allocation of the total amount for the requisition line that is charged to a ChartField combination.

For example, if you have one distribution and you enter 100 for that distribution line, the system charges 100 percent of the requisition request to the same department or project. However, if you have two distribution lines, and you enter 50 percent for the first distribution line and 50 percent for the second distribution line, the system evenly distributes the requisition line amount among both distributions.

Note. Changes to the labor percentage or amount triggers an automatic recalculation of the total percentage for the distribution line.

Account

Enter the account that is to be charged to a particular ChartField combination.

Budget Status

Displays whether the distribution has been budget checked, when commitment control is on. Values for the field include *Not Chekd* and *Valid.*

Budget Date

Displays the date used by commitment control to determine the budget period to which this item cost belongs.

Pre-Encumbrance Balance

Displays the pre-encumbrance balance. Pre-encumbrance is created in your budget records by the budget-checking process when you generate a requisition.

Note. If the work order is linked to a requisition, all distribution information defaults from the requisition. You can override the distribution information here.

In the case of multi-position requisitions, work order distribution amounts are recalculated to prorate the amounts for a single position, which is based on the percentage defined on each distribution line on the requisition.

For individual service work orders related to a multi-resource work order, the distribution information for the parent work order is also displayed as available distribution lines for selection . You can select the distribution line that you want to add to the lower-level individual service work order. After you select a distribution from the available distribution lines, that line no longer appears in the list of values available for selection in future searches.

Purchase Order Information

	Click to access the purchase order generated for the work order. The purchase order must be approved, budget checked (if commitment control is enabled), have valid doc tolerance, and must be dispatched before releasing the work order. **Note.** If the preapproval logistical tasks aren't complete, an error message appears and the status does not change to *Submitted.*
Process PO (process purchase order)	Click to populate the purchase order staging tables. **Note.** This button appears only if purchase orders are integrated with work orders.
Quick Source	Click to access the Requisition Sourcer run control page, where you can automatically build a purchase order. **Note.** This option does not appear before a work order is approved or after the work order is released.

Maintaining Work Order Consumption Information

Access the Work Order - Consumption page (select the Consumption tab on the Work Order - Details page).

Details | Cost | Consumption | Approvals and Alerts | Comments | Surveys | Service Summary

Work Order ID: DMO00000083000 Work Order Name: 0000000140

Business Unit: US001 US001 NEW YORK OPERATIONS

Work Order Status: Released

Vendor: Anderson Consulting Provider Contact: Contact,Cindy

Cost Details

Currency Code: USD Exchange Rate Detail ☑ Allow Expenses

Select from the radio buttons below to view the Work Order Rates in the Work Order or Base Currency.

◉ Display in Work Order Currency ○ Display in Base Currency

Amount Details

Labor Amount:	50.00
Expense Amount:	5.00
WO Amount:	55.00

Consumption page (1 of 2)

Time & Expense Cost Summary

	Labor Amount	Billable Amount	Expense Amount
Consumed on Current WO:	0.00	0.00	0.00
Total Consumed:	0.00	0.00	0.00
Remaining:	50.00	55.00	5.00
Invoiced:	0.00	0.00	0.00

View Consumption Details

Go To: Manage Services Work Orders Work Order History

Cancel Work Order | Close Work Order

Save | Terminate | Extend Work Order

Details | Cost | Consumption | Approvals and Alerts | Comments | Surveys | Service Summary

Consumption page (2 of 2)

Note. This page appears only when the work order is released.

Billable Amount

Displays the total billable amount service providers reported against a particular work order. It does not include any tax values and is updated when a new time report is entered.

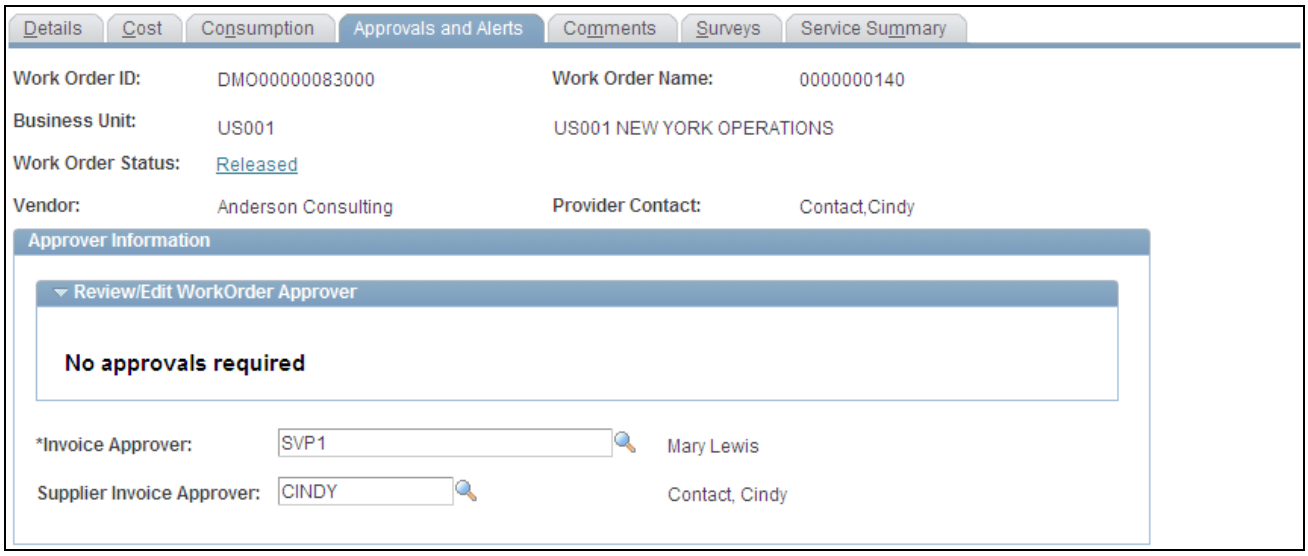
This amount reflects any shift or assignment pay.

View Consumption Details Click to access the timesheets, expenses, and invoices that are related to this work order.

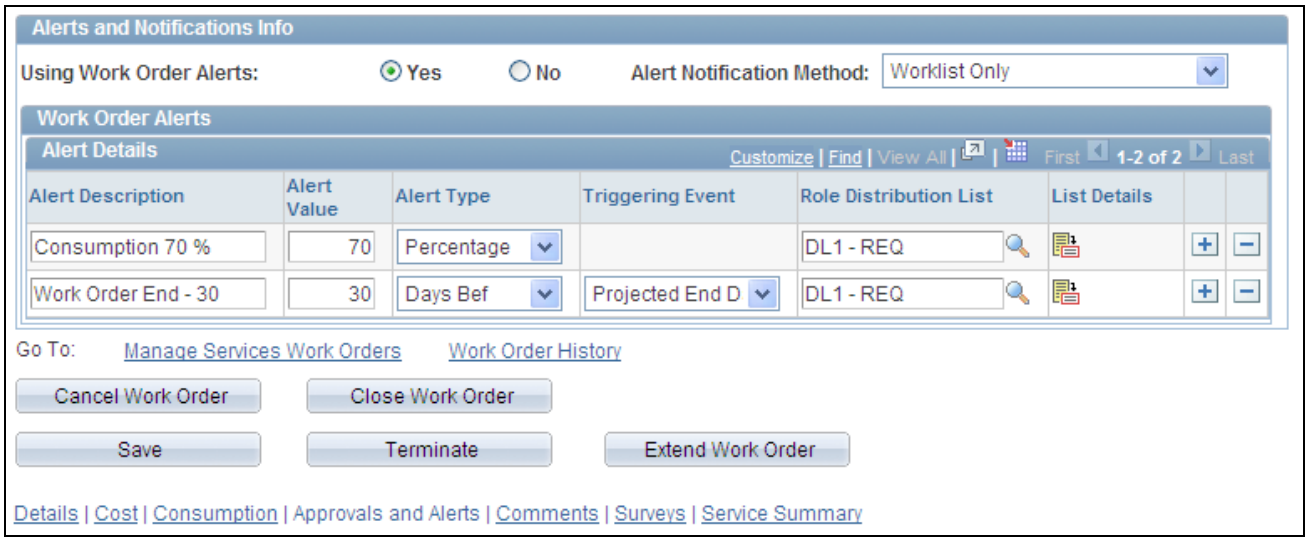
Note. These fields appear after the work order is released and time and expense sheets have been logged. Multi-resource parent work orders display the cumulative consumption for all related individual service work orders. Individual service work orders display both the overall consumption for the related parent multi resource work order and the consumption for the specific individual service.

Managing Work Order Approvals and Alerts

Access the Work Order - Approvals and Alerts page (select the Approvals and Alerts tab on the Work Orders - Details page.



Work Order - Approvals and Alerts page (1 of 2)



Work Order - Approvals and Alerts page (2 of 2)

Invoice Approver

Enter the name of the person responsible for approving the invoices associated with this work order. The value appears by default from the requester or service coordinator defaults. The lookup contains all users with the role action *SP_INVOICE_APPROVER.*

Supplier Invoice Approver

This field appears if the selected supplier is set to approve invoices. Enter the name of the supplier user responsible for approving the invoices associated with this work order. This field defaults to the service provider contact for work orders that are not VMS managed, and to the service coordinator or team member with role action*SP_SPLR_INV_APPROVER* for work orders that are VMS managed. If the invoice is not VMS managed, the lookup contains all service provider contacts for the supplier with the appropriate role action. If the invoice is VMS managed, the lookup contains all service coordinators for the VMS supplier.

If this option is selected after work orders have already been opened for the supplier, then the supplier invoice approver name on these work orders will be missing. Therefore, the system issues a warning whenever this option is selected to remind the user to review all open work orders for this supplier and to assign a supplier invoice approver.

If the supplier invoice approver is missing on any work orders, invoicing will bypass submitting the invoice to suppliers for approval even though the Include in Invoice Approval option is selected.

Using Work Order Alerts

This default value comes from the Service Requester Defaults,Service Coordinator Defaults,Service Type, or Business Unit– in that order. Select *Yes* if you want alert notifications to be generated for the triggers entered in the Work Order Alerts grid. Select *No* if work alerts are not needed.

Alert Notification Method

This default value comes from the Service Requester Defaults,Service Coordinator Defaults,Service Type, or Business Unit– in that order. Select if you want alert notifications to be generated for the triggers entered in the Work Order Alerts grid. Specify if the alerts should be *Worklist* entries only or both *Worklist and Email.*

Alert Description

Enter a brief description for the work order alert notification. Alert information defaults from requester or service coordinator default information, service type, or business unit.

Alert Value

Enter a value to determine when the work order event triggers.

Note. This value is represented in days and percent.

For example, if you create a work order alert description of Consumption 80%, the alert value will be 80. When the system reaches an 80 percent consumption rate, the work order event triggers. As well, if you create a work order alert description of Work Order End - 10, the alert value will be 10, to indicate that the work order will trigger 10 days before the work order projected end.

Alert Type

Select the type of alert that the system uses to trigger the work order notification. Values are:

- *Days Before*: Indicates the number of days before a specific event.
- *Days After*: Indicates the number of days after a specific event.
- *Percent Consumption*: Indicates a percent that must be reached in order for a work order event to trigger.

Note. The Alert Type and Alert Value fields work in combination together.

Triggering Event

Select to indicate the trigger for the when the work order notification. For the Days Before alert type, the valid triggering events are *Actual End Date, Projected Start Date,* and *Projected End Date.* For the Days After alert type, the valid triggering events are *Actual Start Date,Actual End Date, Approval Date,Cancel Date,Closed Date,Entered Date,Projected End Date, Projected Start Date,Released Date,* and *Terminated Date.* For Alert Types or Days Before or Days After, the triggering event is used in conjunction with the alert value to determine when the alert is sent.

Role Distribution List

Select the list of users that will receive the work order notification.

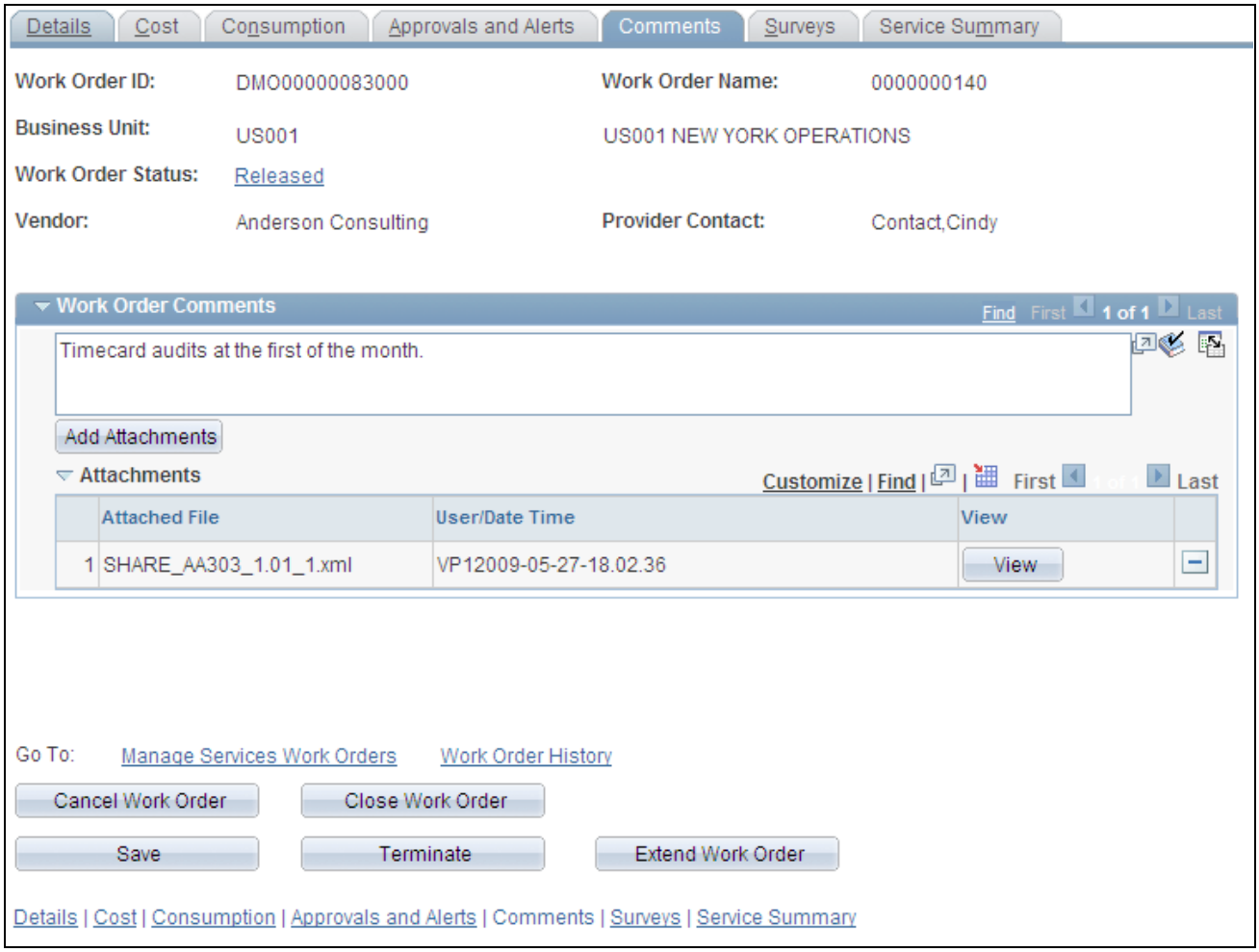
See Chapter 23, "Using Surveys in PeopleSoft Services Procurement," Defining Role Distribution Lists, page 603.

See Also

Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining Work Order Settings, page 48

Adding Comments and Attachments to Work Orders

Access the Work Orders - Comments page (Services Procurement, Manage Services Work Orders, Work Order - Service).



Work Order - Comments page

You use this page to add comments about the work order and to upload additional documents as attachments to the work order. To upload attachments, click the Add Attachment link. To view attachments that are associated with the work order, click the View button.

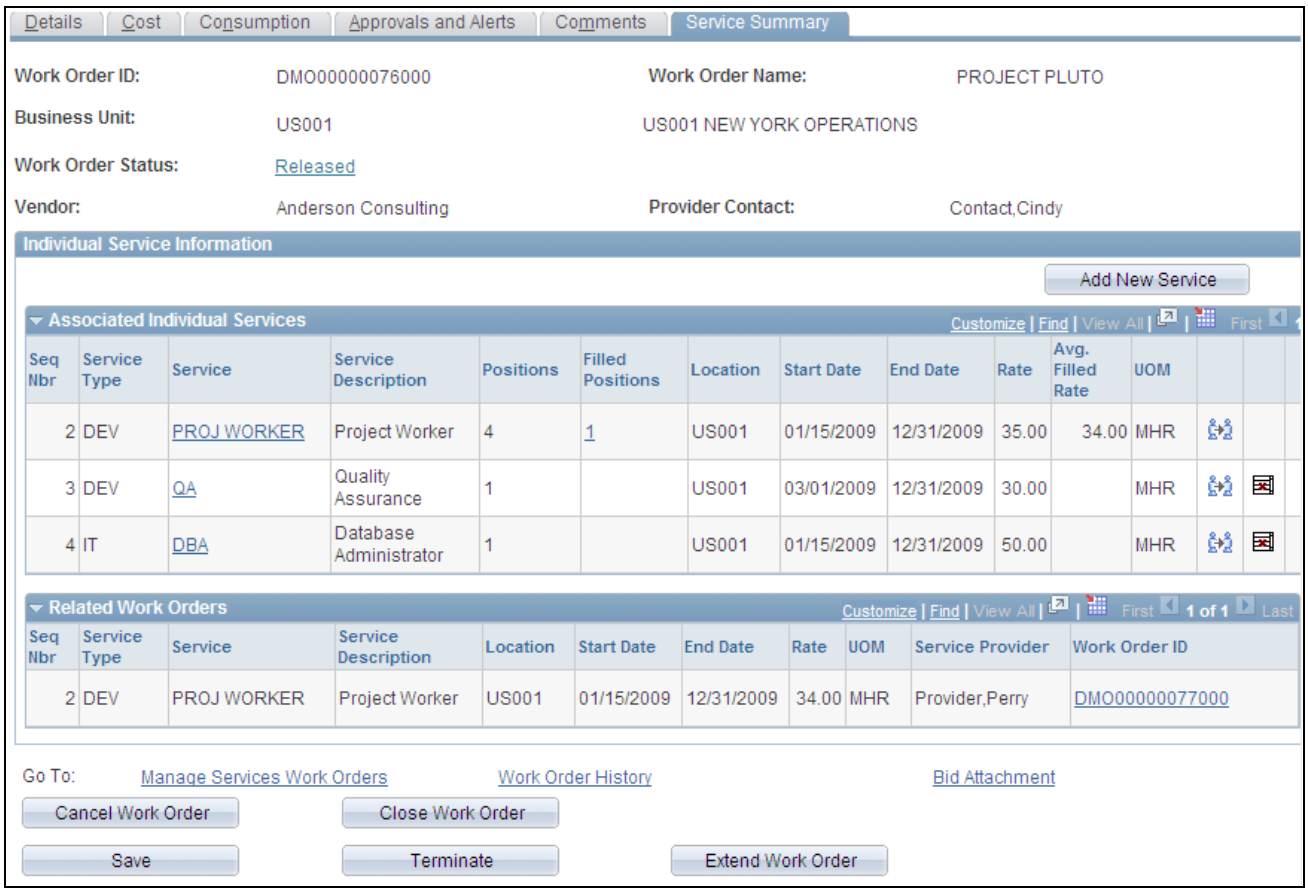
Defining Work Order Survey Information

Access the Work Order - Surveys page (select the Surveys tab on the Work Order - Service page).

See Chapter 23, "Using Surveys in PeopleSoft Services Procurement," Editing and Submitting Work Order Surveys, page 608.

Using Work Order Services

Access the Service Summary page (Services Procurement, Manage Services Work Orders, Work Order - Details, select the Service Summary tab).



Service Summary page

When you create a work order for a multi-resource service, you can access the individual child service information by selecting the Service Summary tab. Header information on the Service Summary page provides basic details about the work order. You can click the Status link to access the Service Work Order History page.

Click the Add New Service button to access the Identify Work Order Services page where you can add a lower-level service. You can add a new service until the parent multi-resource work order is cancelled, closed, terminated, or finalized. For individual child services, you can update the total number of positions until the last position is filled.

Add Individual Services

This grid displays the lower-level individual services and enables the sourcing process to fill them and create child work orders.

Seq Num (sequence number)	Displays the service sequence number. This is the unique identifier for the individual child services because it is possible to have more than one occurrence of the same kind of service. You can sort individual services information and the system maintains the sequence number with the work order to which it was assigned.
Service	Displays the service associated with this work order sequence. Click the link to access the Identify Work Order Services page where you can maintain detailed information. Individual services are resource-based services.
Positions	Displays the number of positions that have been defined for this service.
Filled Positions	Displays the number of positions that have been filled for this service. The field appears in the grid after you fill a service position and a child work order has been created. Click the value to highlight the corresponding services work order rows on the Related Work Orders grid box.
	Click to access the Assign Sourcing page where you can select to manually assign the work order to a service provider without sending it out for bid negotiations. Or, you can select to use the sourcing process to assign work order to a service provider through bid negotiations. For multi-resource position services, the Select Resource button is available until you fill the last position. **Note.** If the business unit is not set to allow manual selection of service provider, you must use the sourcing process to fill the work order service. The Manage Work Order Sourcing page in the Review and Source component is used to manage the sourcing of individual services.
	Click to remove this service from the work order.
	Click to cancel this service from the work order.

Related Work Orders

This grid box provides information about any work order in which multi-resource service positions were filled. The grid box appears with the highlighted work orders when you click the Filled Positions link in the Add Individual Service grid box.

Click the Work Order ID link to access review and maintain the work order.

Viewing Shifts Associated with Services

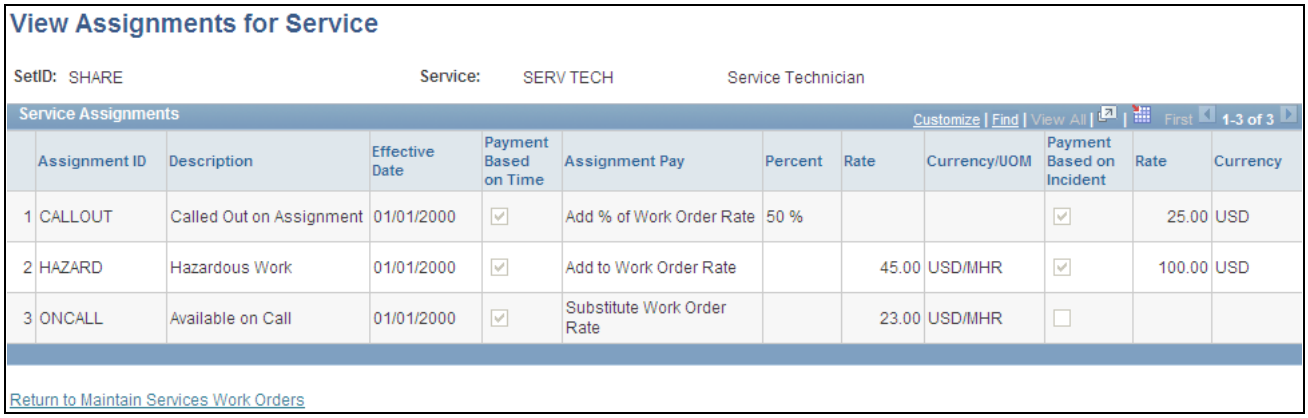
Access the View Shifts for Service page (Services Procurement, Manage Services Work Orders, click the View Shifts for Service link on the Work Order - Details page).

Use this page to view the shifts that are associated with a specific service.

Important! When a work order is associated to a time template that uses a 24-hour clock and the Derive Shifts from Time of Day option is selected, the start and end times that appear on this page are the start and end times from the time template rather than from the Shifts by Service definition because the time template information takes precedence.

Viewing Assignments Associated with Services

Access the View Assignments for Service page (click the View Assignments for Service link on the Work Order - Service page).



View Assignments for Service

SetID: SHARE Service: SERV TECH Service Technician

Service Assignments Customize | Find | View All | First 1-3 of 3

	Assignment ID	Description	Effective Date	Payment Based on Time	Assignment Pay	Percent	Rate	Currency/UOM	Payment Based on Incident	Rate	Currency
1	CALLOUT	Called Out on Assignment	01/01/2000	☑	Add % of Work Order Rate	50 %			☑	25.00	USD
2	HAZARD	Hazardous Work	01/01/2000	☑	Add to Work Order Rate		45.00	USD/MHR	☑	100.00	USD
3	ONCALL	Available on Call	01/01/2000	☑	Substitute Work Order Rate		23.00	USD/MHR	☐		

Return to Maintain Services Work Orders

View Assignments for Service page

Use this page to view the assignments that are associated with a specific service.

Defining Individual Service Details for Work Orders

Access the Work Order Individual Service Details page (Services Procurement, Manage Services Work Orders, and after completing the work order search, click the Work Order ID link, select the Service Summary tab, and click the Add New Service button.

You use this page to define the service type and service, the number of positions for the additional service for multi-resource work orders. You can source on lower-level individual services before you release the top-line work order.

After completing the service details, click the Go To Main Transaction link to return to the Services Summary page. The new service will appear in the Associated Individual Service grid along with the information you define on this page. Using the Services Summary page, you can then source the individual services. Depending on the business unit setting, you might have the option to manually assign the work order to a service provider without sending it out for bid negotiations. Regardless of the business unit setting, you can always use the sourcing process to assign work order to a service provider through bid negotiations.

Assigning Resources to Multi-Resource Services

Access the Assign Resource page (Services Procurement, Manage Services Work Orders, and after completing the work order search, click the Work Order ID link, select the Service Summary tab, and click the Select Resource button).

Use the page to select a method for assigning resources to the multi-resource work order that you selected when the business unit is defined to allow manual assignment of service providers. Click the OK button after making your selection and the system accesses the appropriate page for you to assign the resource.

Assign Known Service Provider	Select to use the work order process to assign the work order to a service provider without sending it out for bid negotiations. When you click the OK button, the system displays the Manage Services Work Orders - Service page.
Assign Service Provider through Bid Process	Select to Use the sourcing process to assign work order to a service provider through bid negotiations When you click the OK button, the system displays the Work Order Service Sourcing Select page.

Extending Individual Services on Multi-Resource Work Orders

Access the Select Services for Extension page (Services Procurement, Manage Services Work Orders, Work Order - Details, and after completing the work order search, click the Extend Work Order link).

You can extend individual services for multi-resource work orders when the top-line, multi-resource work order is extended. After you select a service, adjust the position value, if needed, and click the OK button, the system displays the Service page with the original work order and service values. After you update the work order, click the Save button and the system creates the extension work orders.

Note. If the work order was created using a manually-entered ID, you'll have to assign an ID for the work order.

Select Service	Select to include the corresponding service in a new work order to extend the service.
Positions	Select to include the corresponding service in a new work order to extend the service. You can adjust the number of position to extend. When the system creates the new work order, it will be for the positions that you select. The new position value must be less than or equal to the current value.

Based on the status, there are some restrictions on extending individual services. Individual services that are not yet filled when the multi-resource service is extended will not be extended along with it. If they are subsequently filled, they can be manually extended. You cannot extend individual services that are closed or cancelled.

Note. Individual service work orders can be extended separately within the date range of the parent multi-resource service work order.

Creating Purchase Orders with the Quick Sourcer

If purchase order integration is activated, you must create a purchase order for a work order before releasing it. You must use the link on the work order page to initiate the purchase order creation.

Note. You cannot release a work order without creating and dispatching the purchase order first.

Pages Used to Create Purchase Orders with the Quick Sourcer

Page Name	*Definition Name*	*Navigation*	*Usage*
Quick Sourcer - Autosource Parameters	PV_RUN_REQSORC_1	Click the Quick Source link on the Work Order - Cost page.	Enter parameters for the AutoSelect Requisitions process.
Quick Sourcer - Purchase Order Values	PV_RUN_REQSORC_2	Click the Purchase Order Values link on the Quick Sourcer - Autosource Parameters page.	Enter parameters for the PO Calculations process and the Create Purchase Order process.

See Also

PeopleSoft Purchasing 9.1 PeopleBook, "Using Purchase Order Sourcing"

Entering Parameters for the AutoSelect Requisitions Process

Access the Quick Sourcer - Autosource Parameters page (Services Procurement, Manage Services Work Orders, Work Order - Service, select the Cost tab, and click the Quick Source link on the Work Order - Cost page).

The values for the parameters are filled in automatically if you run the process from the link on the work order page.

Request Type Displays *Purch Ord* as the requisition type by default.

Item ID Required Displays a check box that is deselected, because work orders do not have an item ID.

From Business Unit and **To Business Unit** Displays the work order business unit by default.

Work Order ID Displays the work order ID by default.

Vendor Displays the work order vendor by default.

From Requisition IDand **To Requisition ID** Displays the work order requisition ID by default, if the work order is linked to a requisition.

Entering Parameters for the PO Calculations and Create Purchase Order Processes

Access the Quick Sourcer - Purchase Order Values page (click the Purchase Order Values link on the Quick Sourcer - Autosource Parameters page).

Buyer	Displays the buyer defined on the procurement user defaults.
Consolidation Method	Determines whether purchase orders are consolidated by business unit, vendor, and buyer (select *B*) or by business unit and vendor only (select *V*) The consolidation method applies only to staged rows that are identified for consolidation.
Pre-Approve Vendor	Select to approve the vendor that the PO_POCALC process selects automatically. You can run the PO Calculations process and the Create PO process as a unit, without having to approve the vendors. Appears selected by default. For services the vendor is the supplier from the work order.
Build PO's as Approved	Select to create POs with an *Approved* status when you run the Create PO process. If you select this option, the process examines auto approval criteria set at the business unit level. Appears selected by default.
Expedite Staged POs	Select to source all requisitions that are located in the staging table. Appears selected by default.
Hold from Further Processing	Select to place the resultant purchase orders on hold and prevent further processing.
Calculate PO Line Numbers	Select to ignore staged entry line numbers when the Create PO 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. Appears selected by default.
Allow Dispatch When Approved	Select to make the resultant purchase orders eligible for dispatch. Appears selected by default.

See Also

PeopleSoft Purchasing 9.1 PeopleBook, "Using Purchase Order Sourcing"

Managing Purchase Orders

Access the Manage Purchase Orders page.

Use this page to run budget checking (if commitment control is enabled for PeopleSoft Purchasing), check doc tolerance, and dispatch purchase orders.

Note. You can edit the SUT information only if purchase orders are not integrated with work orders

Budget Check

Click the Budget Check button to run budget checking for this purchase order. This button is available if commitment control is enabled for PeopleSoft Purchasing.

Note. When commitment control is enabled, the services coordinator cannot offer the position or manually release the work order until the requisition has been budget checked

Doc Tol Status(document tolerance status)

If document tolerance checking is enabled, the system displays the document tolerance status. The system runs the Document Tolerance process (before budget checking) when you click the Budget Check button, or you can run the process separately. Document tolerance checks the change in percentage or a fixed dollar amount between the purchase order and requisition at the ChartField distribution level. Values are:

- *V* (valid): The purchase order has passed document tolerance checking.
- *N* (not checked): The purchase order requires document tolerance checking.

  If any amounts, quantities, or ChartFields are modified after the document tolerance is checked, the system resets the document tolerance status to *Not Checked.*
- *E* (error): Exceptions were generated for the purchase order during document tolerance checking.

  You can override document tolerance exceptions on the Document Tolerance Exception page.

Dispatch

Click the Dispatch button to dispatch the purchase order.

Note. The purchase order must be dispatched before the work order can be released.

Closing Services Purchase Orders

This section discusses how to close services purchase orders.

Page Used to Close Services Purchase Orders

Page Name	*Definition Name*	*Navigation*	*Usage*
Close PO	RUN_PORECON	Services Procurement, Reconciliations, Close Purchase Orders	Close all qualified services purchase orders by running the Close Purchase Order (PO_POREP) process, and generate the Purchase Order Reconciliation report.

Closing Services Purchase Orders

Access the Close PO page (Services Procurement, Reconciliations, Close Purchase Orders).

Use the Close PO page to close qualified purchase orders and to generate the Close Purchase Order Report.

See *PeopleSoft Purchasing 9.1 PeopleBook*, "Using the Buyer's Workbench."

See Also

Appendix E, "PeopleSoft Services Procurement Reports," page 715

Viewing Service Provider Assignments

This section discusses how to view service provider assignments.

Pages Used to View Service Provider Assignments

Page Name	*Definition Name*	*Navigation*	*Usage*
Service Provider List	SPF_WO_SP_LIST	Services Procurement, Service Provider Assignments	View a list of service providers assignments.
Service Provider - Details	SPF_WORDER_DETAIL	Click the Work Order ID link on the Service Provider List page.	View the work order details for a particular service provider.

Viewing the Service Provider List

Access the Service Provider List page (Services Procurement, Service Provider Assignments).

Use this page to search the service provider list based on work order ID, service provider, and start date.

Work Order ID	Click to access the Service Provider - Details page, where you can view work order details for a specific service provider.

Viewing Logistical Tasks

This section provides an overview of the logistical task flow and discusses how to view task checklists.

Logistical Task Flow

Logistical tasks are administrative tasks that need to be executed and approved before a work order is released. Logistical tasks include both preapproval and postapproval executions. Preapproval tasks must be completed before the work order is approved. For example, a preapproval logistical task might include assigning a new badge or ordering a new laptop. Postapproval tasks, on the other hand, must be completed before a work order is released to a service provider. For example, postapproval logistical tasks might include scheduling orientation or setting up the service provider email account.

Here is the basic flow of logistical tasks:

1. Create a service work order.
2. View the logistical task checklist.

   After preapproval tasks are complete, select the Execution Complete check box.
3. Submit the work order for approval.

   After an open work order is submitted for approval, the system automatically checks for all preapproval logistical tasks that are assigned to that work order. You must complete all preapproval tasks before submitting the work order for approval.
4. Release the work order to the service provider.

   After the work order is released to the service provider, the system automatically checks for all postapproval logistical tasks that are assigned to that work order. You must complete all mandatory postapproval tasks before releasing the work order. Automatic postapproval tasks will be marked as completed.

   After the work order is released to the service provider, the service provider can use it to log time and expense.

   Note. If you have implemented eligible service provider functionality, the system monitors for eligible service providers and provides warnings about providers who are not eligible to fill a work order before the work order is released.
5. (Optional) Terminate the work order.

   After the termination process is initiated, notification is sent for any termination logistical tasks associated with the work order. The termination can not be completed until the termination tasks are marked completed.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Logistical Tasks, page 97

Pages Used to View Logistical Tasks

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Services Work Orders	SPF_WORDER_ROSTER	Services Procurement, Manage Services Work Orders	Add and maintain work orders.
View Task Checklist	SPF_WO_TASK_CHKLST	Click the View Logistical Task List button on the Manage Services Work Order page.	View logistical tasks.
View Task Detail	SPF_WO_VIEW_TASKDT	Click the Task Description link under the Task Details group box.	View details of your logistical task.

Viewing Task Checklists

Access the View Task Checklist page (Services Procurement, Manage Services Work Orders and click the View Logistical Task List button on the Manage Services Work Order page).

Service Work Order

View Task Checklist

Work Order ID: DMO00000087000 Business Unit: US001

Work Order Type: Original Work Order Status: Approved

This List is used to keep track of Procurement related tasks that have been manually completed.

Task Details

Task Description	Group Name	Assigned-To	Approval Type	Task Status	Expected Task Completion Date
Order Laptop	DEVELOPER	Gina Angelini	Pre-Approval	Completed	01/07/2011
Assign Badge	DEVELOPER	Kenneth Schumacher	Pre-Approval	Completed	01/07/2011
Set up E-mail Account	DEVELOPER	Yolanda Sanchez	Post-Approval	Not Started	01/07/2011
Create Name Plate	DEVELOPER	Yolanda Sanchez	Post-Approval	Not Started	01/07/2011

☐ Execute All Eligible Task

View Task Checklist page

Task Description Click to access the View Task Details page, where you can view the task details associated with the work order.

Group Name The system displays the task group to which the task has been assigned.

Assigned-To Displays the requester or approver to whom the task has been assigned.

Approval Type Displays at what point in the work order approval process that a task is performed. Values include *Pre-Approval*, *Post-Approval*,*Off-board*, and *Terminate.*

Task Status

Displays the status of the task. If your system is enabled to send work order tasks to Microsoft Outlook, then the statuses for this field are the same as those in Microsoft Outlook. When the status of a task is changed in Outlook, the status in this field is updated to match. You can also change the status manually in this field and the status is synchronized in Outlook. This field appears on the page regardless of whether your system is enabled to send tasks to Outlook. Field values include:

- *Completed:* Indicates that the task is complete. When you select this value and save the page, the system selects the Execution Complete check box to indicate the completion of the task. The system also updates this field to *Completed* and selects the Execution Complete check box when the status is updated to Completed in Outlook.
- *Deferred:* Indicates that the task is deferred. The value can be changed on this page or in Microsoft Outlook.
- *In Progress:* Indicates that the task is in progress. The value can be changed on this page or in Microsoft Outlook.
- *Not Started:* Indicates that the task has not been started. This is the default value.
- *Waiting on someone else:* Indicates that the task is waiting for another user for input. The value can be changed on this page or in Microsoft Outlook.

Expected Task Completion Date

Displays when the task is expected to be completed.

Notify

Select to send an email message to the person to whom the task is assigned.

Notify Date

The system displays the date that the notification email was sent to the person to whom the task is assigned.

Deleted in Outlook

Indicates whether a task has been deleted in Microsoft Outlook. If the check box is selected, the task has been deleted. This is a display-only check box. As a Services Procurement user, you cannot delete a task, whereas a task can be deleted in Microsoft Outlook. If a task is deleted in Outlook, it is not sent back to Outlook. However, you can still carry out the task in Services Procurement. This field is hidden if your system is not enabled to share tasks with Outlook.

Execution Complete

Select when the logistical task is complete. If the task is completed in Microsoft Outlook, this check box is automatically selected.

Task Completion Date

The system displays the date that the logistical task was performed.

Execution Type

The system displays *Mandatory*, *Automatic*, or *Optional*.

Viewing VAT and SUT Information

This section discusses how to:

- View work order VAT.
- View work order SUT information.

Pages Used to View VAT and SUT Information

Page Name	*Definition Name*	*Navigation*	*Usage*
Work Order VAT	SPF_WO_VAT	Click the VAT/Intrastat button on the Work Order - Cost page.	View VAT locations and defaults. **Note.** VAT defaults can be edited if purchase orders are not integrated with work orders.
Work Order Sales/Use Tax Information	SPF_WO_SUT	Click the Sales/Use Tax button on the Work Order - Cost page.	View SUT information. **Note.** SUT information can be edited if purchase orders are not integrated with work orders.

Viewing Work Order VAT

Access the Work Order VAT page (click the VAT/Intrastat button on the Work Order - Cost page).

Use this page to review the VAT that appears by default for the work order. If the VAT information needs to be updated, update it on the generated purchase order before releasing the work order. Upon releasing the work order, the purchase order VAT information is copied on the work order where it is view only.

Note. You can edit the VAT defaults only if purchase orders are not integrated with work orders.

Because complex algorithms are used to obtain the VAT defaults, avoid manually changing these values as far as possible.

Return to Services Work Order Click to return to the Services Work Order page.

Expand All Sections Click the expand button to scroll to and access every section on the page. You can also expand one or more sections by clicking the arrow next to the section's name.

Collapse All Sections Click to collapse all sections that display only the header information. If you expand one or more sections, you can click the arrow next to the section's name to collapse the section.

Physical Nature Indicates whether an object is a good or a service. Many countries are required to report the sale and purchase of goods separately from services.

Note. Because these are service work orders, physical nature should always be *Services,* and you won't need to change it.

VAT Locations

Location Country Displays the PeopleSoft Purchasing business unit bill to location country.

Location State Displays the PeopleSoft Purchasing business unit bill to location state.

Vendor Location Country Displays the vendor's order from location country.

Vendor Location State Displays the vendor's order from location state.

Service Performed Country Depending on the services performed option setting in the PeopleSoft Purchasing defaulting hierarchy (for example, on the vendor or business unit), here are some ways in which the system can set the value for this field:

- If the option specifies the ship from location, this field is set to the vendor's ship from location country
- If the option specifies the ship to location, this field is set to the ship to location country.
- If the option specifies the buyer's location, this field is set to the PeopleSoft Purchasing business unit bill to location country.
- If the option specifies the suppliers location, this field is set to the vendor's order from location country.

Service Performed State

This value appears only if the service performed country requires that VAT be tracked by state or province. Depending on the services performed setting in the PeopleSoft Purchasing default hierarchy (for example, on the vendor or business unit), the system sets the following values for this field:

- If services performed specifies the ship from location, this field is set to the vendor's ship from location state.
- If services performed specifies the ship to location, this field is set to the ship to location state.
- If services performed specifies the buyer's location, this field is set to the PeopleSoft Purchasing business unit bill to location state.
- If services performed specifies the suppliers location, this field is set to the vendor's order from location state.

Ship From Country

Displays the vendor's ship from location country. In the case of transactions involving goods or freight service transactions, this is used to determine the VAT treatment.

Ship From State

If the ship to country is defined as tracking VAT by state and province, it displays the vendor's ship from location state. In the case of transactions involving goods or freight service transactions, this is used to determine the VAT treatment.

Ship To Country

Displays the ship to location country. In the case of transactions involving goods or freight service transactions, this is used to determine the VAT treatment.

Ship To State

If the ship to country is defined as tracking VAT by state and province, the system displays the ship to location state. In the case of transactions involving goods or freight service transactions, this is used to determine the VAT treatment.

Reviewing VAT Defaults

Use this group box to view VAT defaults. You can only update VAT defaults if purchase orders are not integrated with work orders.

Service Type

The system displays the VAT service type of *Freight* or *Other*. The value in this field determines whether or not the special rules for freight transport within the European Union (EU) apply.

Place of Supply Driver

Displays the usual place of supply (the place where VAT is usually liable) for the service. This value is used to help determine the place of supply country and the VAT treatment. Values are *Buyer's Countries*, *Supplier's Countries* or *Where Physically Performed.*

Reporting Country

Displays the country for which this VAT is to be reported. This is the VAT entity and VAT registration country that determines many of the VAT defaults.

Defaulting State

If the reporting country requires that VAT be tracked by state or province, this field displays the state within the reporting country that is used to retrieve values from the VAT Defaults table.

Vendor Registration Country and **Vendor Registration ID**

Displays the registration country and ID of the vendor.

Exception Type

Displays the exception granted to the VAT entity. Values are *None*, *Exonerated*, or *Suspended.* This value is specified on the VAT entity registration.

Certificate ID

If applicable, displays the ID of the VAT exception certificate that may have been issued to the VAT entity.

Calculate at Gross or Net

Indicates how VAT is calculated. The default value comes from the VAT entity driver. Values are:

- *Gross:* The system calculates VAT before it applies any early payment discounts.
- *Net:* The system calculates VAT after it deducts early payment discounts. If there are two percentage discounts, the system uses the larger of the two when it calculates VAT. The system does not use discount amounts, only discount percentages.

Recalculate at Payment

Select this check box to enable the recalculation of VAT at payment time to allow for any early payment discounts, if you are calculating VAT at gross. This causes the system to adjust the VAT amount at the time of payment if the discount has been taken. This is set on the VAT entity driver.

Declaration Point

For a good or a service, displays when you want VAT transaction information to be recognized for reporting purposes. Values are:

- *Invoice:* VAT is recognized at time of invoice.
- *Payment:* VAT is recognized at time of payment.
- *Delivery:* VAT is recognized on delivery.

This value may be set at four levels in the VAT hierarchy: VAT entity registration, purchase order options, vendor, and vendor location.

VAT Rounding Rule

Displays the VAT rounding rule. The default value comes from the VAT country, VAT entity registration, vendor, or vendor location driver. Values are:

- *Natural Round:* Amounts are rounded normally (up or down) to the precision specified for the currency code. For example, for a currency defined with two decimal places, 157.4659 would round up to 157.47, but 157.4649 would round down to 157.46.
- *Round Down:* Amounts are rounded down. For example, for a currency defined with two decimal places, 157.4699 would round down to 157.46.
- *Round Up:* Amounts are rounded up with a rounding precision to one additional decimal place. For example, for a currency defined with 2 decimal places, 157.4659 would round up to 157.47, but 157.4609 would round down to 157.46.

Use Type

Determines the split between recoverable (taxable) and nonrecoverable (nontaxable) VAT.

For the Canadian public sector, the use type also determines the rebate of the nonrecoverable VAT. VAT rebates are calculated based on statutory rebate rates that are established for each public service body.

The value comes from the VAT defaulting hierarchy, from the item, item business unit, item category, vendor location, vendor, or purchasing options.

Include Freight

If selected, the system includes any freight amounts in the VAT basis by calculating VAT on the merchandise amount, plus any freight amount. This option is only available for exclusive VAT calculation. The value comes from the VAT entity registration driver.

Include Miscellaneous

If selected, the system includes any miscellaneous charge amounts in the VAT basis by calculating VAT on the merchandise amount, plus any miscellaneous charge amount. This option is available only for exclusive VAT calculation. The value comes from the VAT entity registration driver.

Place of Supply Country

For services, displays the country in which the VAT is liable. The default value comes from a complex algorithm.

Treatment

Displays the VAT treatment, based on a complex algorithm. Values are:

- *Domestic Goods Purchase:* If the ship from and ship to countries are the same, and the vendor is registered for VAT, the transaction is treated as domestic.
- *Domestic Services Purchase:* If the buyer and seller are both located in the country where the VAT is liable, the transaction is treated as domestic.
- *EU Goods Purchase:* If the ship from and ship to countries are different, the system determines whether both countries are located within the EU.

  If so, the system looks at the VAT registration for each trading partner to determine whether the transaction should be treated as an intra-EU purchase, domestic, or outside the scope of VAT.
- *EU Services Purchase:* If each trading partner is located and registered in different EU countries, and the VAT on a service is liable in the buyer's country, the transaction is treated as a self-assessed EU services purchase.
- *Self-Assess Goods Import:* If the ship from country is different from the ship to country and either or both of the countries are located outside of the EU, and the vendor is not registered in the ship to country, the transaction would be treated as an import.

  If the option on the entry in the VAT Country table for the VAT reporting country indicates that VAT on imports should be self-assessed, the transaction is treated as a self-assess goods import, and both input and output VAT are recorded.
- *Self-Assess Services Import:* If each trading partner is located and registered in different countries, and the VAT on a service is liable in the buyer's country, the transaction is treated as a self-assessed services import.
- *Zero-rated Goods Import:* If the ship from country is different from the ship to country and either or both of the countries are located outside of the EU, and the vendor is not registered in the ship to country, the transaction would be treated as an import.

  If the option on the entry in the VAT Country table for the VAT reporting country indicates that only input VAT should be recorded on imports, the transaction is treated as a zero-rated goods import.
- *Outside of Scope:* If the supplier is not registered for VAT, or if the VAT is liable in a country other than the VAT reporting country, the transaction is treated as outside the scope of VAT.
- *No VAT Processing:* For transactions where the physical nature is goods, if the ship to country has not been defined as a VAT country and the VAT reporting country on the transaction is blank, no VAT information is recorded.

Within PeopleSoft, detail VAT treatment values on the transaction lines are used for applying the precise defaults applicable to the transaction lines. The treatment is determined based the rules applicable to the transaction.

Note. Treatments values related to goods do not apply for PeopleSoft Services Procurement.

Applicability

Displays the VAT status, which comes from an algorithm. Values are:

- *Taxable*
- *Exempt* (not subject to VAT)
- *Outside of Scope of VAT*
- *Suspended*
- *Exonerated*

Record Output VAT

Select this check box to enable entry of vouchers where VAT is not included on the invoice but is payable to the VAT authority rather than the vendor. In this case, you are accounting for both input and output VAT for the purchase. This is the case for an intra-EU acquisition or when you must account for output VAT on a service supplied by a foreign supplier. This is also referred to as self-assessing for VAT. The value comes from an algorithm that uses the treatment and applicability to retrieve the applicable value from the VAT system setup data that PeopleSoft delivers.

VAT Code

Displays the VAT code that defines the rate at which VAT is calculated for this line.

Transaction Type

Displays the code that categorizes and classifies this transaction for VAT reporting and accounting.

Adjust/Reset VAT Defaults

Any changes that you make to fields on this page may affect VAT defaults on this page. For accuracy and consistency, use the following fields to adjust affected VAT defaults or to reset all VAT defaults. Adjusting or resetting VAT defaults only affect fields within the VAT Defaults group box.

Adjust Affected VAT Defaults

Click this button to have the system adjust the VAT defaults that are affected by the changes. All changes that you have made to VAT defaults on this page that affect other VAT defaults on this page are retained.

Click the i button to list the fields to be adjusted.

Note. Always click the Adjust Affected VAT Defaults button after changing any defaults on the VAT page.

Levels

Enables you to specify the levels within the requisition transaction hierarchy to reset when you click the Reset All VAT Defaults button. Values are:

- *All lower levels:* Resets all VAT defaults at lower levels for this page, namely the requisition distribution level.
- *This and all lower levels:* Resets all VAT defaults on this page and at any lower levels of this page.
- *This level only:* Resets all VAT defaults on this page.

Reset All VAT Defaults

Click to have the system reset the VAT defaults based on the levels value that you selected. Any changes that you have previously made to VAT defaults will be lost.

Note. Reset completely redetermines the VAT defaults. This does not necessarily mean they are to be reset to their original values. For example, the user may not have changed any VAT default values, but if a VAT driver field has changed, then clicking Reset redetermines all defaults based on the new driver value.

Viewing Work Order SUT Information

Access the Sales/Use Tax Information for Maintain Services Work Order page (click the Sales/Use Tax button on the Work Order - Cost page).

Use this page to review the SUT information for the work order. If the SUT information must be updated, update it on the generated purchase order before releasing the work order. Upon releasing the work order, the purchase order SUT information is copied onto the work order where it is viewed.

Note. You can edit the SUT information only if purchase orders are not integrated with work orders.

Ultimate Use Code

Enter an ultimate use code to override the default tax rate for a location.

Sales/Use Tax Exception Type and **SUT Excptn Cert** (SUT exemption certificate)

Defaults from the ship to location for the SUT destination. SUT exception type values include *Direct Pay*, *Exempt/Exonerated*, and *None*.

Calculate SUT(calculate sales and use tax)

Click to calculate the SUT using the changes that you made on the page.

See *PeopleSoft Supply Chain Management Integration 9.1 PeopleBook*, "Calculating Sales and Use Tax in Supply Chain Management."

Calculation Parameters

Include VAT (include value-added tax)

This setting is relevant if each line has separate tax code values for SUT and VAT, in which case it is possible to have both on a given line resulting in a tax-on-tax situation. In these instances, the system calculates VAT, then SUT, either on the net-extended amount for the line or on the sum of the net-extended amount and VAT amount.

If this option is selected, it indicates that the VAT amount needs to be taxed and the system adds the VAT amount to the net-extended amount before calculating SUT.

Note. The Include Vat calculation parameter appears by default from the Ship To Location Sales/Tax setup page.

See Also

PeopleSoft Supply Chain Management Integration 9.1 PeopleBook, "Calculating Sales and Use Tax in Supply Chain Management"

Submitting and Approving Work Orders

This section provides an overview of using work order approval and discusses how to:

- Submit work orders for approval.
- Approve work orders.

Using Work Order Approval

You use the PeopleSoft Approval Framework to approve work orders. For work order approvals, the system looks at the approval rules to send the approval notifications. By setting up the appropriate criteria in the approval process definition, you can also perform service provider approvals on the lower-level individual services associated to a multi-resource work order.

See Chapter 8, "Setting Up PeopleSoft Services Procurement Workflow," Setting Up Work Order Workflow, page 236.

See Also

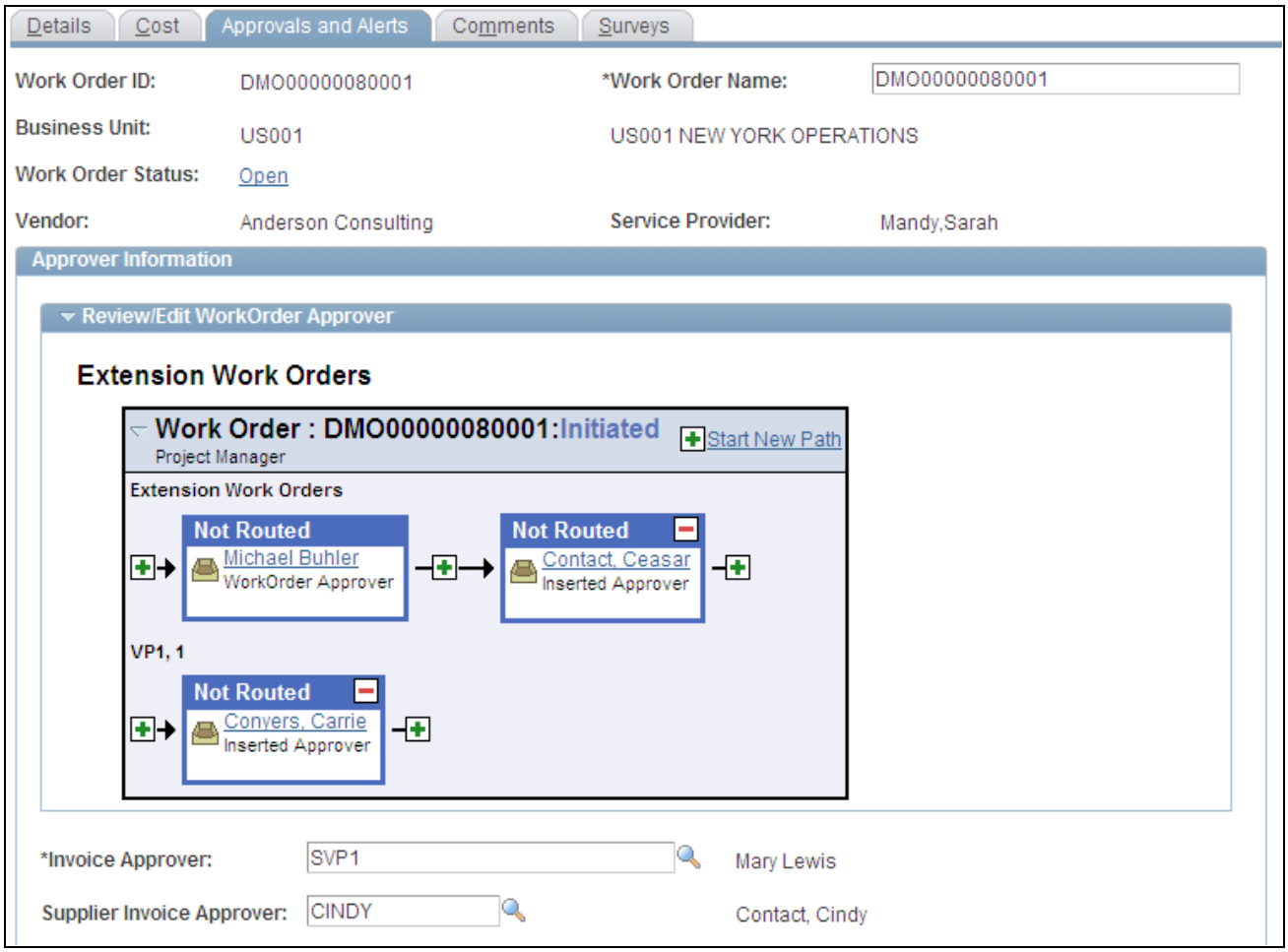
PeopleSoft PeopleTools: Workflow Framework PeopleBook

Pages Used to Submit and Approve Work Orders

Page Name	*Definition Name*	*Navigation*	*Usage*
Work Order - Approvals and Alerts	SPF_WO_APPROVER	Services Procurement, Manage Services Work Orders, Work Order - Service Select the Approvals and Alerts tab.	Submit work orders for approvals.
Work Order Approval	SPF_WO_APPR_PG	Home, Worklist Click the link to the work order ID that needs approval.	Approve or deny a work order during the workflow approval process.
Work Order Details	SPF_WO_REQ_VEN_DT	Click the View Work Order Details Link on the Work Order Approval page.	View additional information about the work order that you are asked to approve.
Deny Work Order	SP_REASONCD_DTL	Click the Deny button on the Work Order Approval page.	Confirm the denial to approve a work order and to provide a reason code and comments for the denial.

Submitting Work Orders for Approval

Access the Work Order - Approvals and Alerts page (Services Procurement, Manage Services Work Orders and click a work order link).



Work Order - Approvals and Alerts page

You can submit work order approvals using Work Order pages. Click the Submit button on any of the pages to send the work order for approval. The Approvals and Alerts page provides a preview of the workflow and any approvers and reviewers in the workflow. This information is available after you save the work order and is derived from the rules and values defined for approval process definitions.

See Chapter 8, "Setting Up PeopleSoft Services Procurement Workflow," Setting Up Work Order Workflow, page 236.

The Approver Information section provides a graphical map of approvers and reviewers for the workflow and the status of their review. You can insert additional ad hoc approvers or reviewers or create a new approval path for the work order. If you insert an ad hoc approver or reviewer, you can also remove the approver or reviewer.

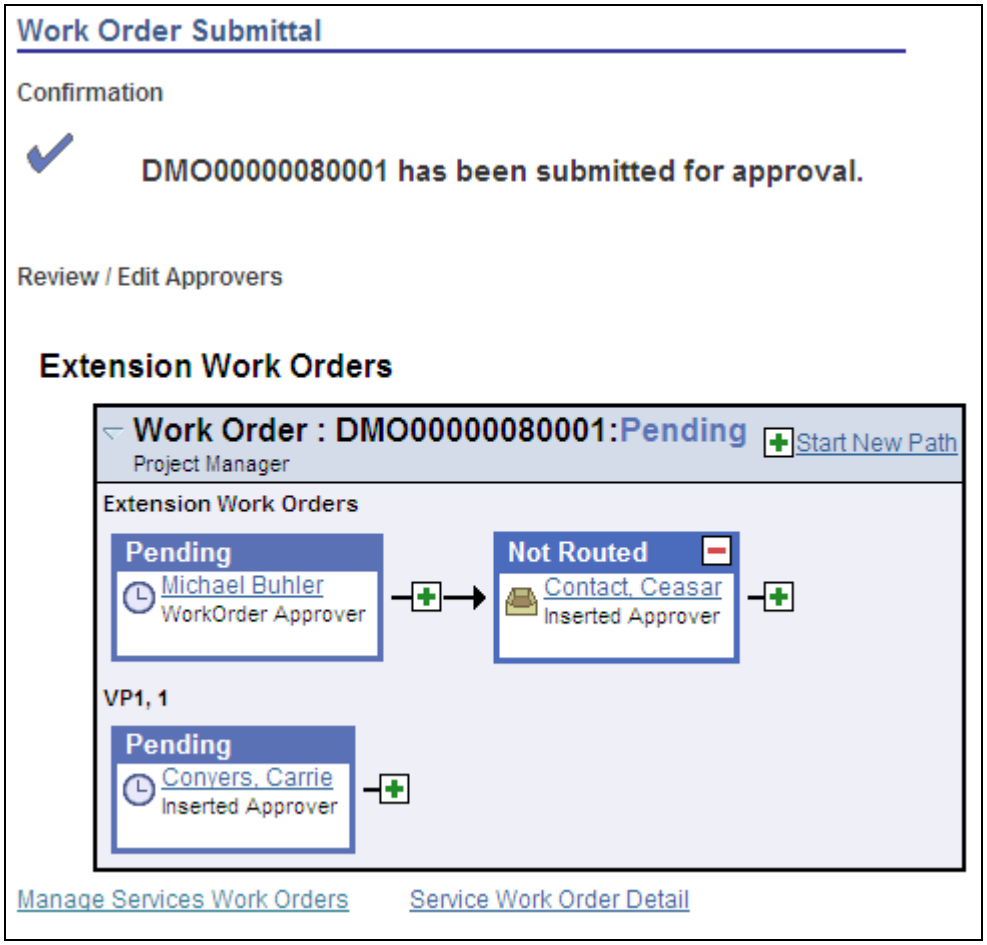
The section also displays the invoice approver and the invoice approver for the supplier who has been assigned to this work order.

Note. When you insert an approver or reviewer, the system provides a Save button in the Review/Edit WorkOrder Approver grid. Make sure that you save the user information before saving the entire page. If you don't save the information, the system doesn't retain updated approver information when you save the page.

For more information about using the Approvals and Alerts page, see the Managing Work Order Approvals and Alerts section.

See Chapter 18, "Managing Work Orders," Managing Work Order Approvals and Alerts, page 446.

When you submit the work order, the Work Order Submittal page appears confirming that the work order has been submitted as shown in the next example:



Work Order Submittal page

After the work order approval has been submitted, you can return to the work order or navigate to the Manage Services Work Orders page where you can select to view work order history and submittal information about the work order.

Approving and Denying Work Orders

Access the Work Order Approval page (Home, Worklist). Or access the Monitor Approvals page (Services Procurement, Manage Approvals and click the link to the work order ID that needs approval).

Work Order Approval

Work Order Details

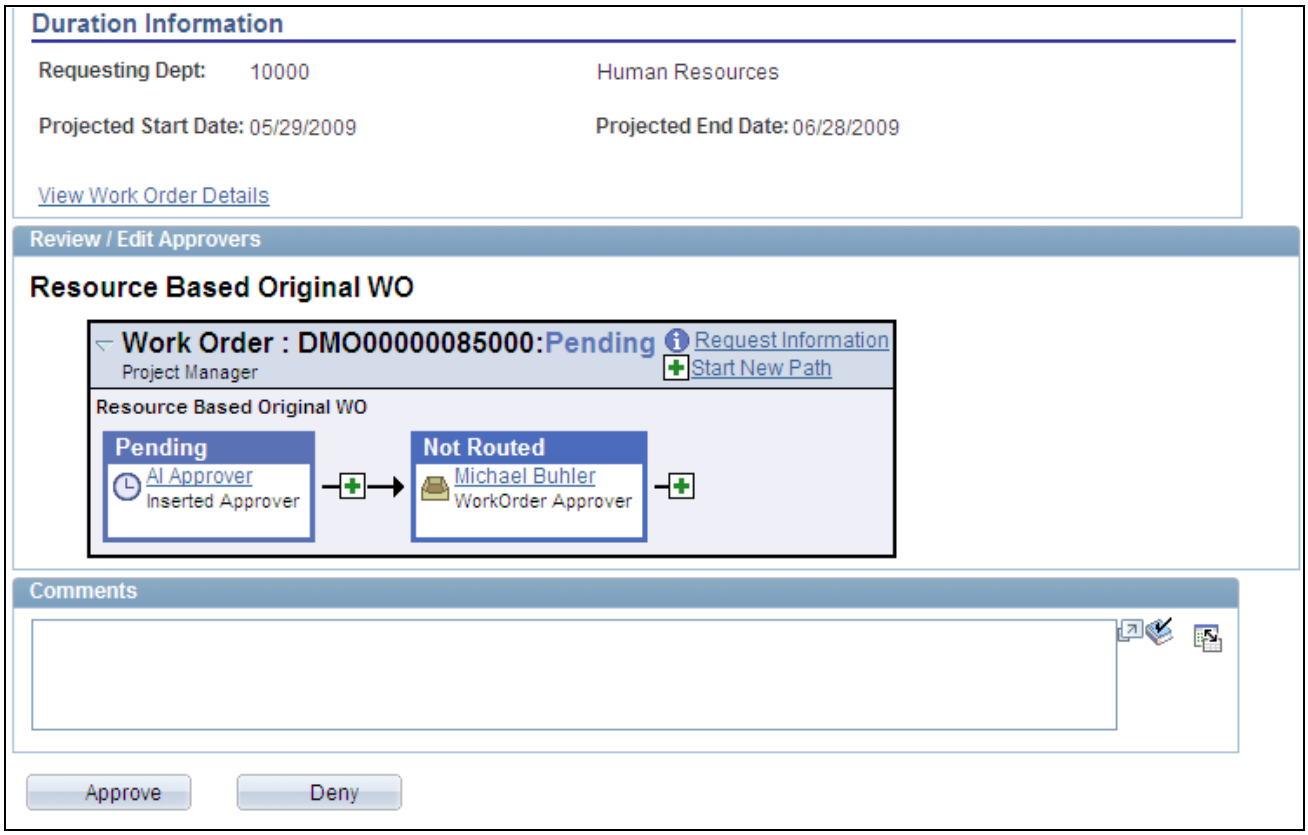
Work Order Information

Work Order ID:	**DMO00000085000**	Work Order Name:	DMO00000085000
Loaded Amount:	9,240.00 USD		
Expense Amount:	2,100.00 USD		
Total:	**11,340.00 USD**		
Loaded Rate:	55.00 USD	UOM:	MHR
Expense Rate:	12.50 USD	UOM:	MHR
Requester:	Kenneth Schumacher		
Date Submitted:	05/29/2009 5:25AM		
Business Unit:	US001	US001 NEW YORK OPERATIONS	
WO Status:	Submitted	Work Order Type:	Original

Service Information

Job Title:	Project Manager	
Service Type:	DEV	Development
Service:	PROJ MANAGER	Project Manager
Service Method:	Resource	
Vendor ID:	USA0000044	Manpower
Provider Contact:	CEASAR	Contact, Ceasar
Service Provider:	PATSY	Provider.Patsy

Work Order Approval page (1 of 2)



Work Order Approval page (2 of 2)

Along with providing basic work order information, the Work Order Approval page enables you to approve, deny, or push back a parent or individual services work order during the workflow approval process.

Note. To approve a work order, you must have a workflow role designed for work order approval.

Use the next links and buttons to access additional information about the work order and to manage work order approvals.

WO Status (work order status)	Click to access the Services Work Order History page. The page includes the changes made by approvers and when the approvals occurred. The link displays the current status of the work order.
View Work Order Details	Click to view the detailed summary of the work order.
Approve	Click to approve the work order. This forwards the work order and any comments that you inserted to the next approver in the path. The system provides a confirmation message when you click this button. When you confirm that you want to approve the work order, the system updates the approval graphic with the newest routing information.

Deny

Click to deny the work order. The system accesses the Deny Work Order page where you can provide a reason code for denying the approval and comments about the denial. If denial reasons are required, you must enter a code.

After you deny a work order, the workflow stops and the system sends a worklist entry to the original requester with any comments that you enter for the denial. The work order's original requester can update the work order to address the issues and resubmit the work order for approval.

Pushback

Click to return the work order to the previous approval step. Pushing back a work order is a way for the approver to question the prior step's approval and request clarification about the approval.

Review/Edit Approvers

This grid contains a graphical map with information about the approval and its status. The title represents the type of work order that is being processed and includes the overall status of the approval. The graphics provide information about individual approvers and the status of their approvals and vary in color depending on the approval status. The system also indicates whether approvals are required.

During the approval process, approvers can add ad hoc approvers or reviewers to the current or a later stage of the work order approval process. For example, if an approver wants input from an service coordinator, she can add the coordinator as an approver. Ad hoc approval applies only to the approval instance in which the addition occurs and does not affect the underlying process definition used for other requests. You can add or remove an ad hoc approver by clicking the plus or minus button next to a graphic. You can also view user information by selecting the link that contains the user ID.

Request Information

Click to return the approval to another user for more information about the work order. That user might not be an approver, but must respond to the request before the approval can proceed to the next approver or reviewer. The system displays a new graphic that represents information has been requested and who is responsible for the request. You can use the comments section to clarify requested information.

Start New Path

Click to start a new approval path for this work order. The system displays the Start new approval path page so that you can select who you want to approve or review the work order. The system places a new graphical symbol at the bottom of the path order after you select the user.

View/Hide Comments

Click to either view or hide comments that are associated with the work order approval.

Comments

Use this section to enter any comments explaining why you are approving this work order. Your comments can be viewed by other approvers and reviewers. Click the View/Hide Comments link to view or hide comments associated with a work order approval. Use the View Expanded button at the right to view additional text.

Chapter 19

Managing Time in PeopleSoft Services Procurement

This chapter provides an overview of time management in PeopleSoft Services Procurement, lists prerequisites, and discusses how to:

- Create timesheets.
- Manage timesheets.
- Submit and approve timesheets.
- Manage timesheet worklists.

Understanding Time Management in PeopleSoft Services Procurement

The service provider uses the timesheet to record and submit time to an approver for immediate, online approval through the Approval Workflow Framework (AWF). The service provider can also track daily activities and report issues. The timesheet approver can provide feedback to the service provider, including performance-rating information through the approval process.

When the service provider logs time against a work order, the time template determines the time reporting codes for that work order. There could be different rules for applicable pay types. For instance, you may pay the pay rate, fixed cost and markups for the first eight hours but only pay the pay rate and fixed costs after eight hours. There could be shift pay differentials or assignment pay differentials associated with the time being logged. When creating invoices against timesheets, the invoicing process considers the rates defined on the work order and the pay types and multipliers associated with the time reporting code, as well as any applicable shift or assignment adjustments, to determine the rate for the supplier.

The timesheet provides the following capabilities:

- Records the number of hours worked on a project as hours per day or as start and stop times, and submits it to the time approver for approval.
- Records specific activities and tracks progress on a project.
- Records and reports project-related problems or issues to the time approver.
- Summarizes all the information entered to create a comprehensive time report.
- Records performance information about a service provider's performance on a project.

- Creates individual services timesheets related to work orders for multi-resource services.

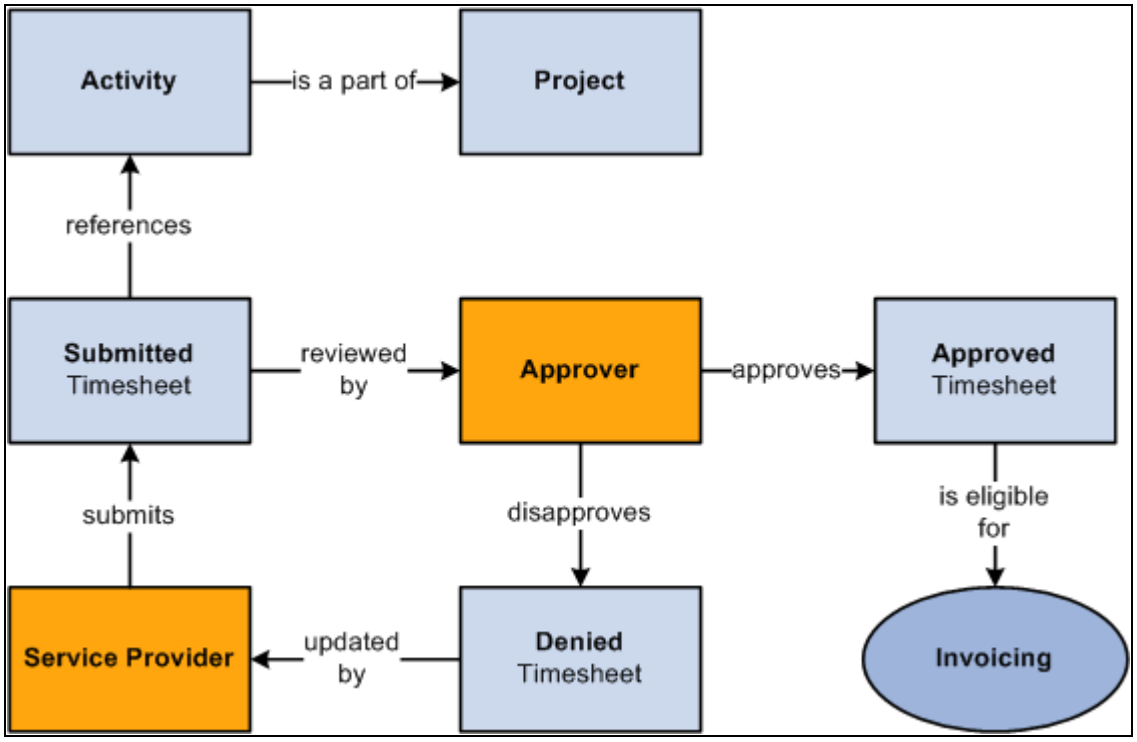
You use the Manage Timesheets page as the focal point for all time activity in PeopleSoft Services Procurement. Use this page to:

- Create, edit, submit, or view timesheets (supplier service provider).
- Filter reports by selecting the criteria in the timesheet status, service provider, or date fields.
- Access pages used to modify time details.

Approval Process

The timesheet approval process begins when the service provider submits his time, along with any project issues, to the designated timesheet approver for review and approval. Any rejected timesheets are returned to the service provider for correction. Submitted timesheets are eligible for adjustment before approval. Approved timesheets are eligible for adjustment upon invoicing.

The following diagram illustrates the timesheet approval process:



Timesheet approval process

Approval Methods

A timesheet can be approved in these ways:

- Mass approval of multiple timesheets.
- Mass line approval for multiple lines.
- Line-by-line approval.

Prerequisites

These attributes must be set up before you enter time information:

- Service methods.
- Services time templates.
- Time reporting rules.
- (Optional) Shifts and assignments, and any associated services.
- Calendars.
- Email messaging.
- Time reporting codes.
- Approval process definition set up.

A work order must also be defined before time transactions can be logged against it. The work order must be resource-based services (versus deliverables-based for progress logs), and it must be in a released status.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Settlement Setup, page 170

Chapter 18, "Managing Work Orders," page 413

Creating Timesheets

This section discusses how to:

- Access timesheets.
- Enter time worked by week using a non-24-hour clock template.
- Enter time worked by calendar and 24-hour clock.
- Enter time against multi-resource work orders.

Pages Used to Create Timesheets

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Timesheets	SPA_SP_R_MAIN_PG	Services Procurement, Maintain Timesheets (external)	Access timesheets.

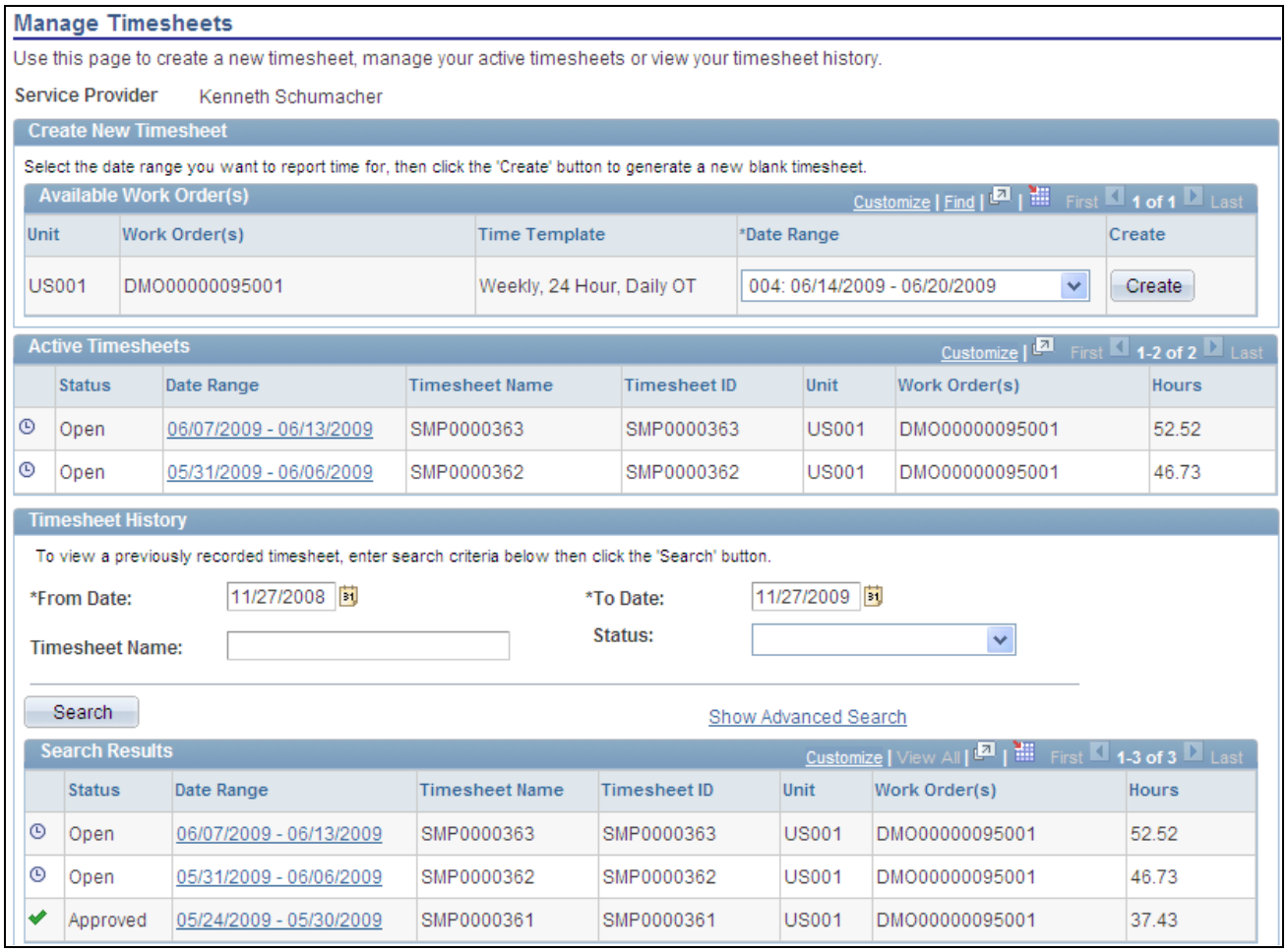
Page Name	Definition Name	Navigation	Usage
Enter Time	SPA_TIME_ENTRY	Click a linked time report on the Manage Timesheets page to view an existing timesheet. Click the Create button on the Manage Timesheets page to enter time on the timesheet.	Enter time worked by week using a non-24-hour clock template. Enter time worked by calendar and 24-hour clock. Enter time against multi-resource work orders.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Settlement Setup, page 170

Accessing Timesheets

Access the Manage Timesheets page (Services Procurement, Maintain Timesheets (external)).



Manage Timesheets page

Use this page to create timesheets, view active timesheets, and timesheet history.

Create New Timesheet

The Create New Timesheet grid groups a unique combination of work orders for a given work order time template.

If multi-resource work orders are available, the individual child work orders appear in the Create New Timesheet section, and the Active Timesheets and Timesheet History grids.

Available Work Order(s)

This grid displays work orders that are available to enter time against.

Work Order Displays work orders for which you can create timesheets. This field also displays multi-resource work orders.

Time Template Indicates the time template that is used by the work order. The template determines how you enter time for the timesheet. Time templates from the lower-level services of a multi-resource service work order also appear in this column.

Date Range Displays the dates that are available for timesheet entry. To see additional dates, click the down arrow at the right of the field.

When the work order is a multi-resource order, the date range that appears is the range for the individual child work orders. The system considers the date ranges for the lower-level services to populate the values for the Date Range field.

Note. This value always appears by default on the next available time template date range.

Create Click to create a new timesheet for the selected time template. The system displays the Enter Time for page for data entry. All work orders for the service provider and the selected template and time period will be available on the timesheet, including any individual child work orders for a multi-resources service

Active Timesheets

This section displays timesheets that are in an active status. These timesheets can include timesheets that were created but never submitted or timesheets that were denied and require re-submission.

To modify a timesheet, click the link that corresponds with the active timesheet.

Timesheet History

Use this section to search for and view past timesheets. You can search for a specific timesheet or timesheets in a certain status. Click the Advanced Search Criteria link to also search for a specific work order or work orders in a certain status.

Manual Entry of TRCs for Timesheets

PeopleSoft Services Procurement enables service providers to manually enter TRCs (time reporting codes) for timesheets. This feature adds flexibility in meeting unique time-recording requirements for scenarios in which you are unable to define a generic rule that covers unusual or complex time keeping requirements. Using manual TRC entry, you can specify the appropriate TRCs to meet time reporting requirements.

The system enables service providers or time approvers to manually identify the correct TRC for special situations in which the system cannot automatically derive the correct TRC. When you create a service time/progress template, you can indicate that you want the capability to manually enter TRCs. Then, when a service provider logs time against a work order for that template, the approver can manually specify TRCs for the time reported. This feature is available for templates using both percentage and actual allocation, as well as both the 24- and non-24-hour clock. To use the feature:

1. Access the Service Time/Progress Template page.

   A services administrator can either create a new template or update an existing template. If an existing template already has associated timesheets, you cannot modify the setting for manually entered TRCs.

2. Complete the template and ensure that you select the Manually enter Timesheet TRCs check box.

3. A services coordinator or requester can then create a resource-based work order that references the template you created or updated in the first step.

4. The service provider can then enter a timesheet against the work order.

   Using the manual time entry feature, the time for each day can be allocated into the appropriate TRC categories based on your specific requirements.

5. Submit the timesheet for approval.

   Approvers can view whether the provider has specified the TRCs or if they were automatically assigned by the system.

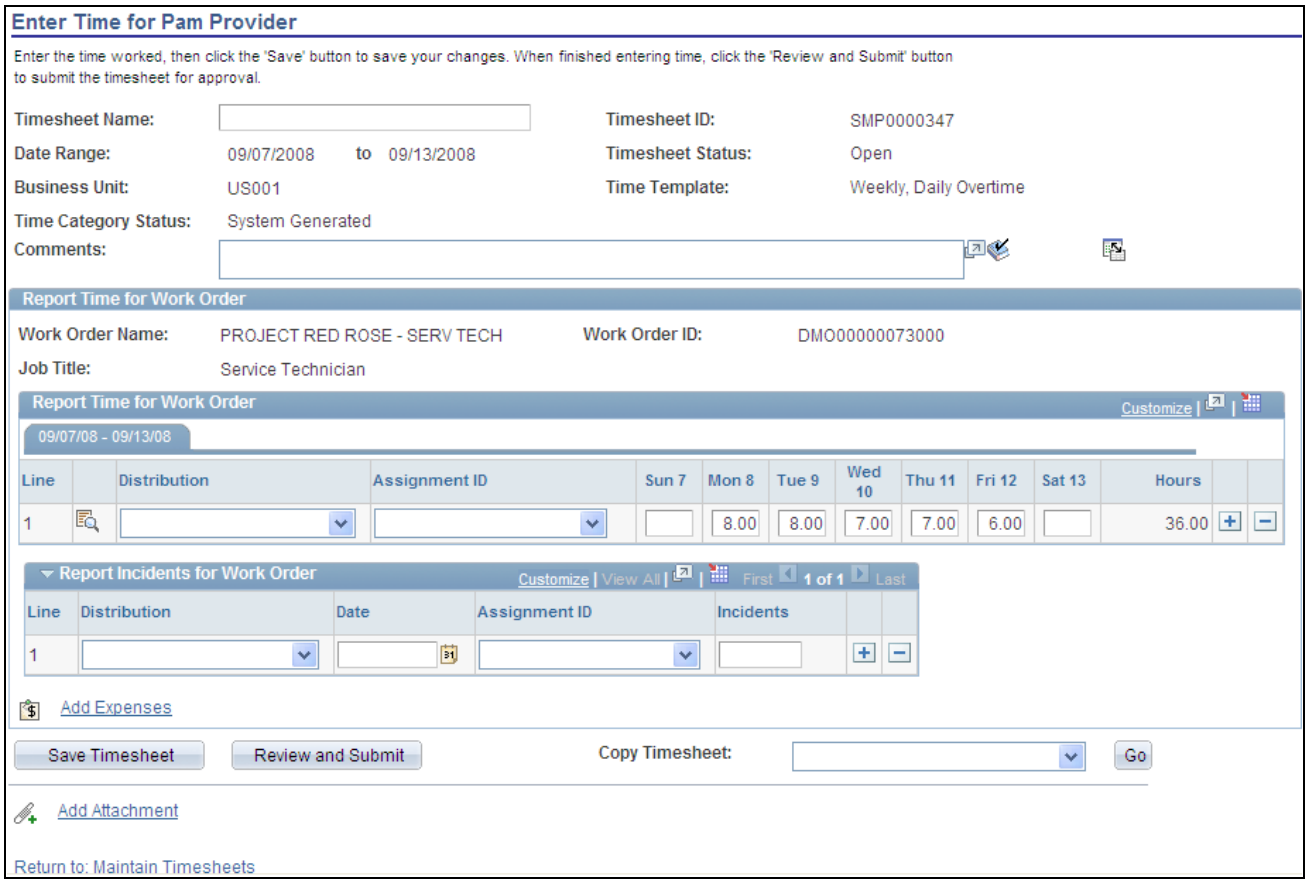
6. The time approver can then approve the timesheet.

   Approvers can view and, if necessary, manually adjust the TRCs before approving the timesheet.

Note. Approvers with appropriate permissions can override a TRC that the system automatically assigned from the Review/Override Time Categories page when manual TRC entry is not allowed. The manual TRC assignment capability does not change the override process, but you can make adjustments to manually assigned TRCs on the timesheet directly when manual TRC entry is allowed.

Entering Time Worked by Week Using a Non-24-Hour Clock Template

Access the Enter Time page (Services Procurement, Maintain Timesheets (external) and click a linked time report on the Manage Timesheets page).



Enter Time page

The format of the time entry page is determined by the time template specified on the work order. In the previous example, the time template makes it possible to enter time on a weekly basis. The Enter Time page header provides basic information about the timesheet. To copy an existing timesheet, select a timesheet in the Copy Timesheet field and click the Go button.

The page displays the lower-level individual service and sequence number when you are entering time related to a lower-level service for a multi-resource, service-method work order. The hours that you enter are assigned by work order and by lower-level services and sequence numbers. If time has been reported against multiple lower-level services in the same timesheet, you can distinguish the time reported for lower-level services.

When using multi-resource work orders, the work order ID and name, time template, job title, distribution, activities, shifts, and assignments and assignment incidents available on the timesheet are from the lower-level services of the work order.

Timesheet Name Displays the name of the timesheet that you selected on the Manage Timesheets page. The name can be assigned by the user or the system when the timesheet is created.

Timesheet ID Displays the system identifier for the timesheet.

Date Range Displays the from and to dates to which the timesheet applies.

Timesheet Status Displays the status of the timesheet. Values include: *Approved,Denied, Open, Submitted, Line Denied,*and *Line Pending*

Time Template Displays the time template used to create the timesheet. If the service method is multi-resource, the time template is the one assigned to the associated lower-level service.

Time Category Status Indicates how the system assigned the time categories for this timesheet. Values include:

Manually Assigned: Indicates that the service provider manually entered the time reporting codes during time entry.

System Generated: Indicates that the system automatically assigned the time reporting codes based on predefined rules.

Adjusted After Approval Indicates if the timesheet was updated after it was initially approved. This field appears after an adjustment has been made to the timesheet.

Comments Enter comments related to the timesheet. The comments are available for use during approvals and reviews.

Save Timesheet Click to save the timesheet. When you save the timesheet, the timesheet appears in the Active Timesheet group box on the Manage Timesheets page.

Review and Submit Click to review and submit the timesheet to the timesheet approver.

Report Time for Work Order

This section displays basic information about a work order.

Work Order Name Displays the work order name.

Work Order ID Displays the work order ID.

Job Title Displays the job title for this work order. If this is a multi-resource work order, the job title is for the associated lower-level service.

Parent Work Order Name When entering time for lower-level service related to a multi-resource work order, the parent work order name is displayed in addition to the work order name of the lower-level service itself.

Parent Work Order ID When entering time for lower-level service related to a multi-resource work order, the parent work order ID is displayed in addition to the work order ID of the lower-level service itself.

Distribution

Click the Work Order Distribution button to access the View/Select Work Order Distribution For: page to select the appropriate accounting line for the work order. This column is available only for actual allocation time reporting.

Distribution

This field is populated with the work order distribution line number selected on the View/Select Work Order Distribution For: page or can be manually selected for actual allocation time reporting.

For multi-resource work orders, values for this page are retrieved from the lower-level service.

TRC (time reporting code)

Select a time reporting code to use with this timesheet line. The column appears for timesheets associated to a service time/progress template that is set for manual TRC selection.

Activity

This field is available if Project Costing is not installed. It is populated with resource-based service activities associated with the work order and generic service activities.

Shift

Select the valid shift for the project, if applicable. This column is available if the Enable Shifts check box is selected on the Services Procurement Bus Unit definition page and if shifts are associated with the service for the reporting time period.

Assignment

Select the valid assignment for the project, if applicable. This column is available if the Enable Assignments option was selected on the Services Procurement Bus Unit definition page and if assignments are associated with the service for the reporting time period.

Time Period

Enter the number of hours worked for the time period.

Hours

Displays the total hours by line for the time period reported.

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Enabling the Use of Shifts and Assignments, page 192.

Report Incidents for Work Order

This section appears if the Enable Assignments option is selected on the Services Procurement Bus Unit definition page, if valid assignments are associated with the service during the time period reported, and if the Based on Incidents option is selected on the Assignment by Service page.

Assignment pay rates come from the Assignment by Service definition if the Define for This Service option is selected; otherwise, the assignment pay rates come from the Assignment definition.

Assignments can be based on time or number of incidents. Any applicable managed service provider (MSP) or enable vendor managed services (VMS) fees are in addition to the assignment pay rate.

Assignment incidents have the following attributes:

- They do not require associated time.
- Multiple assignments can occur in the same day.
- They can have both time and number of incidents associated to them on the same timesheet.

Date(s)	Select the dates for the incident. You can report time against multiple assignments in the same day.
Assignment	Select the appropriate assignment for the time period.
Incident(s)	Enter the number of incidents for the assignment during the time period. The number of incidents is entered on a per line basis.

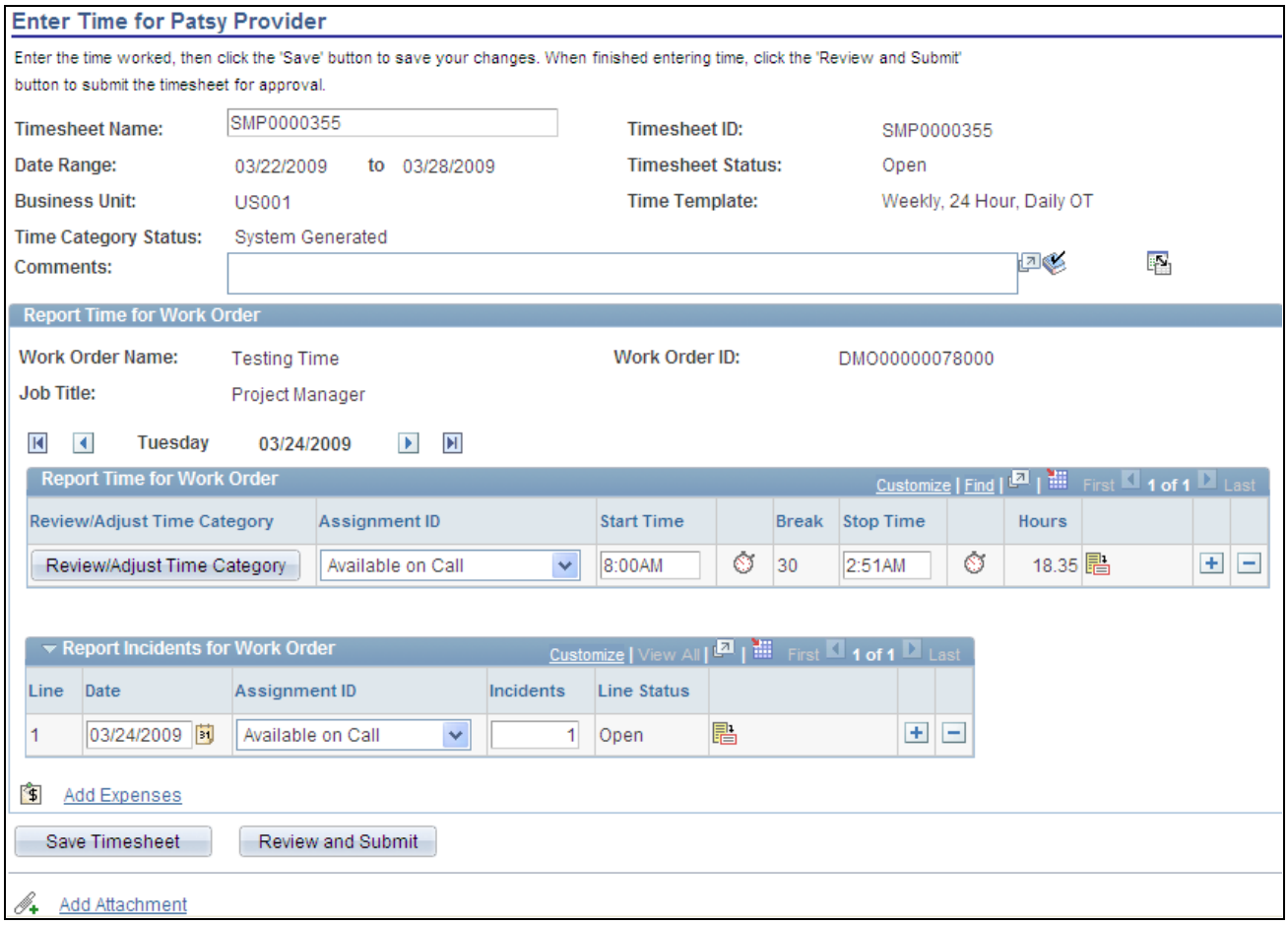
See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Settlement Setup, page 170

Chapter 18, "Managing Work Orders," page 413

Entering Time Worked by Calendar and 24-Hour Clock

Access the Enter Time page (click a linked time report on the Manage Timesheets page).



Enter Time page

The format of the time entry page is determined by the time template specified on the work order. In this example, the time template enables you to enter time using a 24-hour clock. This method of reporting time enables users to record time on a day-by-day basis, with both start and end times. For example, a user can enter time for a day with a start time of 8:00 a.m., a lunch break from 12:00 noon until 1:00 p.m., and an end time of 5:00 p.m. Time can be reported across two days. For such a timesheet, any hours reported as a.m. following hours reported for p.m. will be considered as a.m. of the next day.

Report Time for Work Order

Shift

Select the valid shift for the project, if applicable. This column is available if the Enable Shifts option was selected on the Services Procurement Bus Unit definition page and if shifts are associated with the service for the reporting time period. In addition, the Derive Shift From Time of Day option on the Service/Time Template page cannot be selected or this column will not appear during time entry.

Shifts can be selected manually or automatically based on the time template.

Pay rates come from the service itself if the Define for this Service option is selected on the Shift by Service definition page. Otherwise, the pay rates come from the Shift definition page. Values are:

- Manual selection: Used for non-24-hour clock templates and for 24-hour clock templates for which the Derive From Time of Day option is not selected.

  Service provider selects the related shift for each line.

  Service providers can manually enter shifts based on the following scenarios:

  - Different shifts on different days
  - Multiple shifts on the same day
  - Gaps in time, such as split shifts

- Automatic selection: Used for 24-hour clock templates where the Derive From Time of Day option is selected.

  Service provider enters Start Time, Break time, and Stop Time for each line, and the system automatically derives the shift based on the times entered. The system can derive multiple shifts for a single time line.

Shift Pay Rate Calculations

Shift rate calculation is based on the shift pay type. Any applicable MSP or VMS fees are added in addition to the shift rate.

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Defining Shifts for Use on Timesheets, page 181.

Assignment

Select the valid assignment for the project, if applicable. This column is available if the Enable Assignments option was selected on the Services Procurement Bus Unit definition page and if assignments are associated with the service for the reporting time period.

Hours

Displays the total number of hours worked for a week.

Review/Adjust Time Category	Click to access the Review Time Categories page where you can review the time reporting categories for timesheet.
Details	Click to access the Timesheet details page where you can view the work order and timesheet details, along with the comments and history for the timesheet.
Add Expenses	Click to access the Create Services Expense Report page where you can define expenses associated with this timesheet.
Save Timesheet	Click to save the timesheet. The system verifies field values that you entered and saves the timesheet.
Review and Submit	Click to access the Review Timesheet page. Using the page, you can submit the timesheet for approval, preview approvers, and view charted values for time reporting codes contained in the timesheet.
Add Attachment	Click to access the Timesheet Attachments page. You use the page to upload attachments.

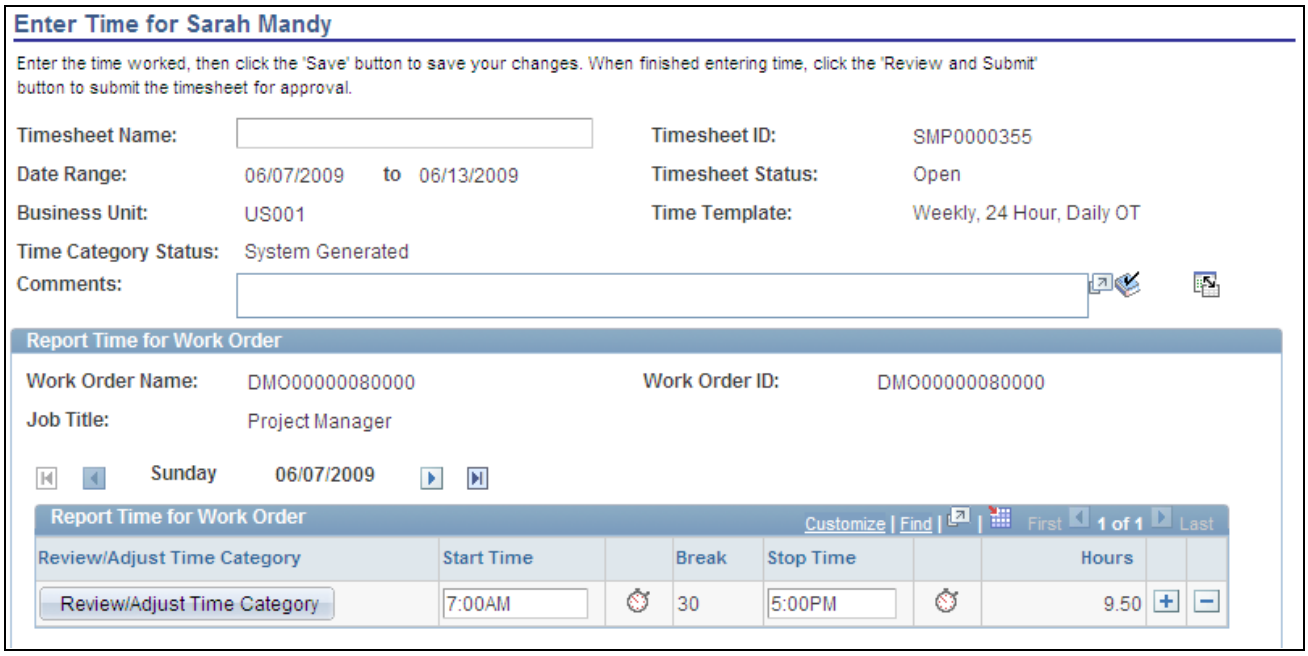
Report Incidents for Work Order

This section appears if the Enable Assignments option is selected on the Services Procurement Bus Unit definition page, if valid assignments are associated with the service during the time period reported, and if the Based on Incidents option is selected on the Assignment by Service definition page.

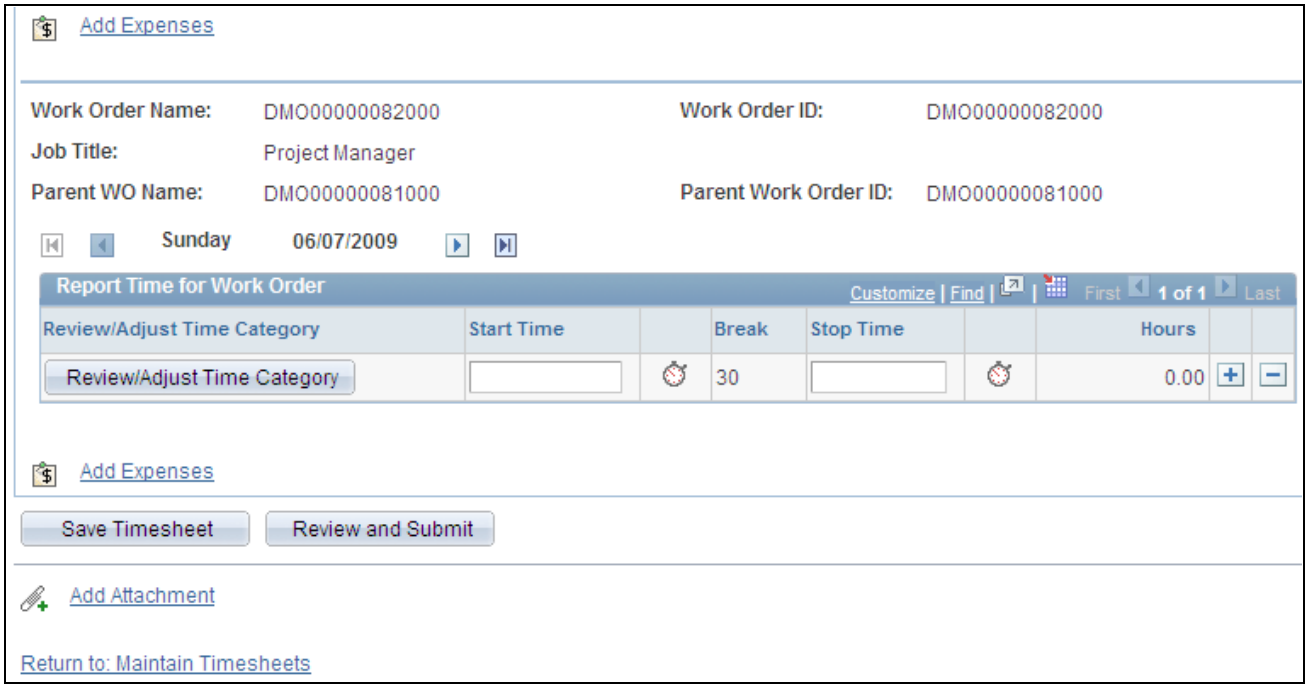
Date(s)	Select the dates for the incident. You can report time against multiple assignments in the same day.
Assignment	Select the appropriate assignment for the time period.
Incident(s)	Enter the number of incidents for the assignment during the time period. The number of incidents is entered on a per line basis.

Entering Time Against Multi-Resource Work Orders

Access the Enter Time for page (click the Create button on the Manage Time page).



Enter Time for page (1 of 2)



Enter Time for page (2 of 2)

When you are working with multi-resource work orders, each individual service provider reports time and expenses individually for work associated to the same time template. Time approval for service providers can have the same or individual approval workflow.

Consumption is recorded against the overall total for the parent work order as well as the individual service work order.

Approvals and notifications for timesheets are also individual within the work order.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Multi-Resource Services, page 203

Chapter 19, "Managing Time in PeopleSoft Services Procurement," Entering Time Worked by Week Using a Non-24-Hour Clock Template, page 483

Chapter 19, "Managing Time in PeopleSoft Services Procurement," Entering Time Worked by Calendar and 24-Hour Clock, page 487

Managing Timesheets

This section provides an overview of overriding timesheets and discusses how to:

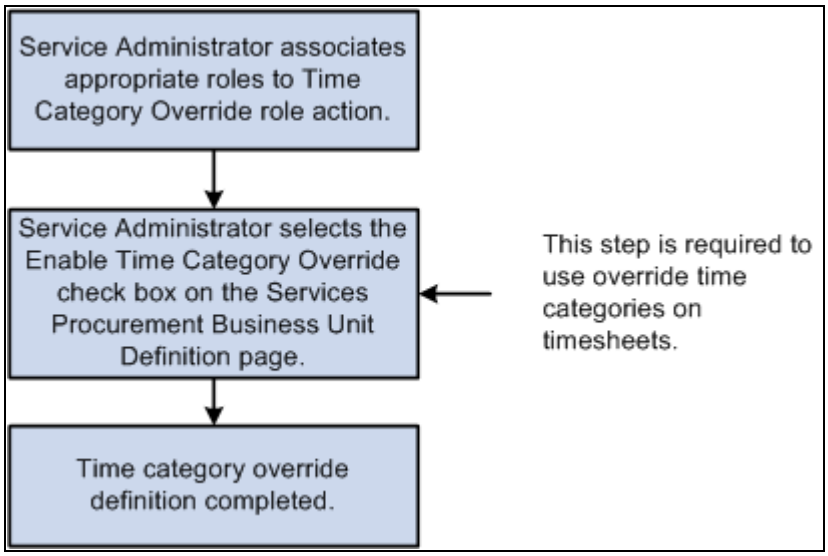
- Adjust timesheets.
- Review timesheet summaries.
- Override time categories on timesheets.

Understanding Time Category Overrides

With PeopleSoft Services Procurement, you can override time categories on timesheets. To accomplish this:

- The Enable Time Categories Override option must be selected on the Services Procurement Bus Unit definition page.
- The role action of SP_TIME_ADJUST_TRC must be associated with users who will be able to override time categories.

The following diagram illustrates the setup of the time category override feature:



Time Category Override setup

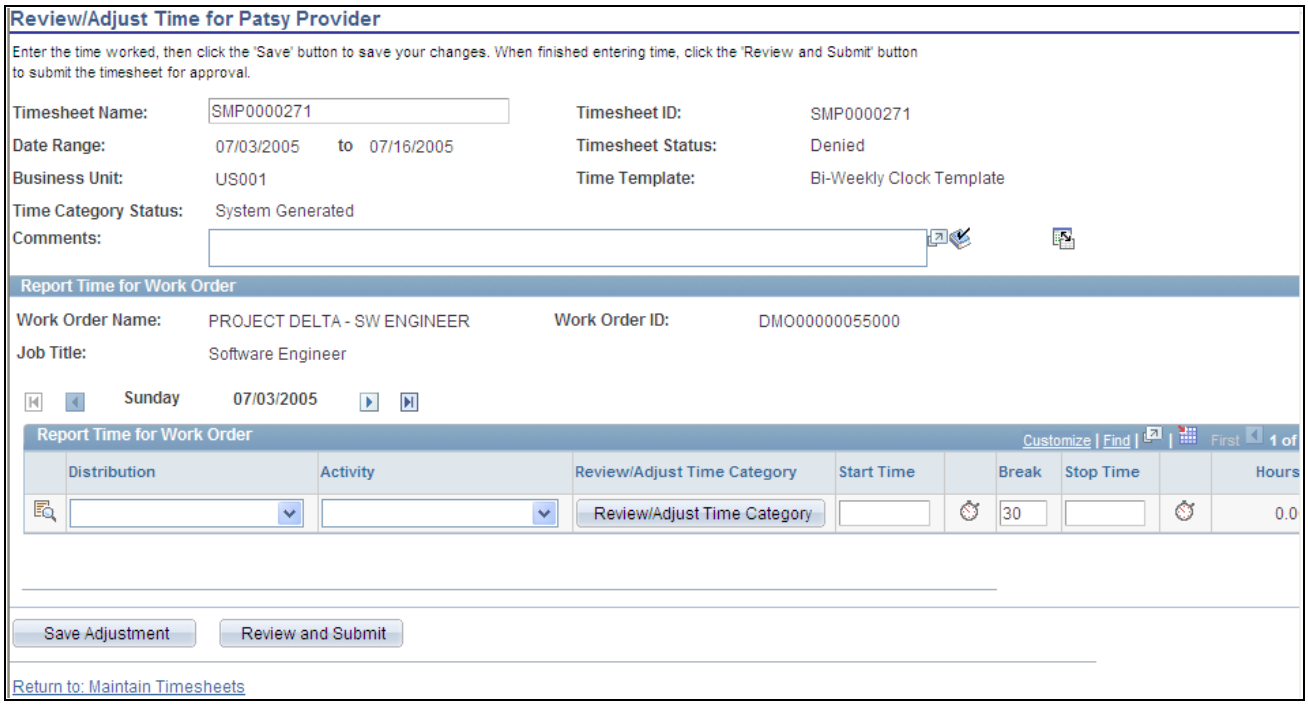
Pages Used to Manage Timesheets

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Timesheets	SPA_SP_R_MAIN_PG	Services Procurement, Maintain Timesheets (external)	View, search, and sort the list of timesheets. Access the timesheet that you want to modify. To add a new timesheet, select a business unit, work order, time template, and date range. Click the Create button.
Enter Time	SPA_TIME_ENTRY	Click the Create button on the Manage Timesheets page	Enter time and incident information related to assigned work orders, including any associated shift or assignment information, such as time line type or number of incidents.
Review/Adjust Time	SPA_TIME_ENTRY	Click the View Summary button on the Enter Time page	Adjust timesheets.
Maintain Timesheets as Proxy	SPA_SUP_R_MAIN_PG	Services Procurement, Maintain Timesheets as Proxy	Manage time on behalf of other users.

Page Name	*Definition Name*	*Navigation*	*Usage*
Timesheet Details	SPA_TIME_DETAILS	Click the Timesheet Details button on the Enter Time page.	View timesheet details, including time category, distribution, and history information. Also included on the page are multi–resource work order IDs, name, job title, and sequence number.
Review/Override Time	SPA_TM_EDIT_TRC	Select a value in the Review/Override Time Category field on the Review/Override Time page.	Override time categories on timesheets.
Review Timesheet	SPA_TIME_SUBMIT	Click the View Summary button or the View and Submit button on the Enter Time page.	Review the timesheet summary.
Timesheet Attachment	SPA_TIME_ATTACH	Click the Add Attachment link on the Enter Time page.	Add, delete, or view an attachment for the timesheet. **Note.** You can add more than one attachment for each timesheet. Click the plus sign to include more attachments for the timesheet.
View/Select Work Order Distribution	SPA_TIMEWO_DISTRIB	Click the Work Order Distribution button on the Enter Time page.	(Optional) Select the appropriate accounting line for the work order.

Adjusting Timesheets

Access the Review/Adjust Time page (click the View Summary button on the Enter Time page).



Review/Adjust Time page

After you make an adjustment to a timesheet, the View Adjustments link becomes available for you to review the adjustment or adjustments that have been made to the timesheet. Click the link to access a search page where you can select an adjustment to view.

Note. You cannot change the work order ID if you are adjusting approved timesheets. You can; however, change the distribution, activity ID, shift, assignment, and time fields as required, if they are available.

When you adjust and submit a timesheet against a multi-resource work order, the system:

- Uses the tolerance percentage of the multi-resource work order to validate the timesheet amount.
- Updates the multi-resource work order's consumption, along with the lower-level service work order's consumption.

Report Time for Work Order

If you do not have the appropriate role action to adjust time, the label displays as Review Time for Work Order.

(Time Reporting Period) Revise the number of hours and then click the Adjust Timesheet button.

Adjust Timesheet Click this button to update the timesheet and save your changes.

Review/Override Time Category

Select the time period for which you want to override the time category on the Review/Override Time Categories page.

The actual navigation that you'll use to access the Review/Override Time Categories page is determined upon which service time template was used to create the timesheet. After you select the time period that you want to override:

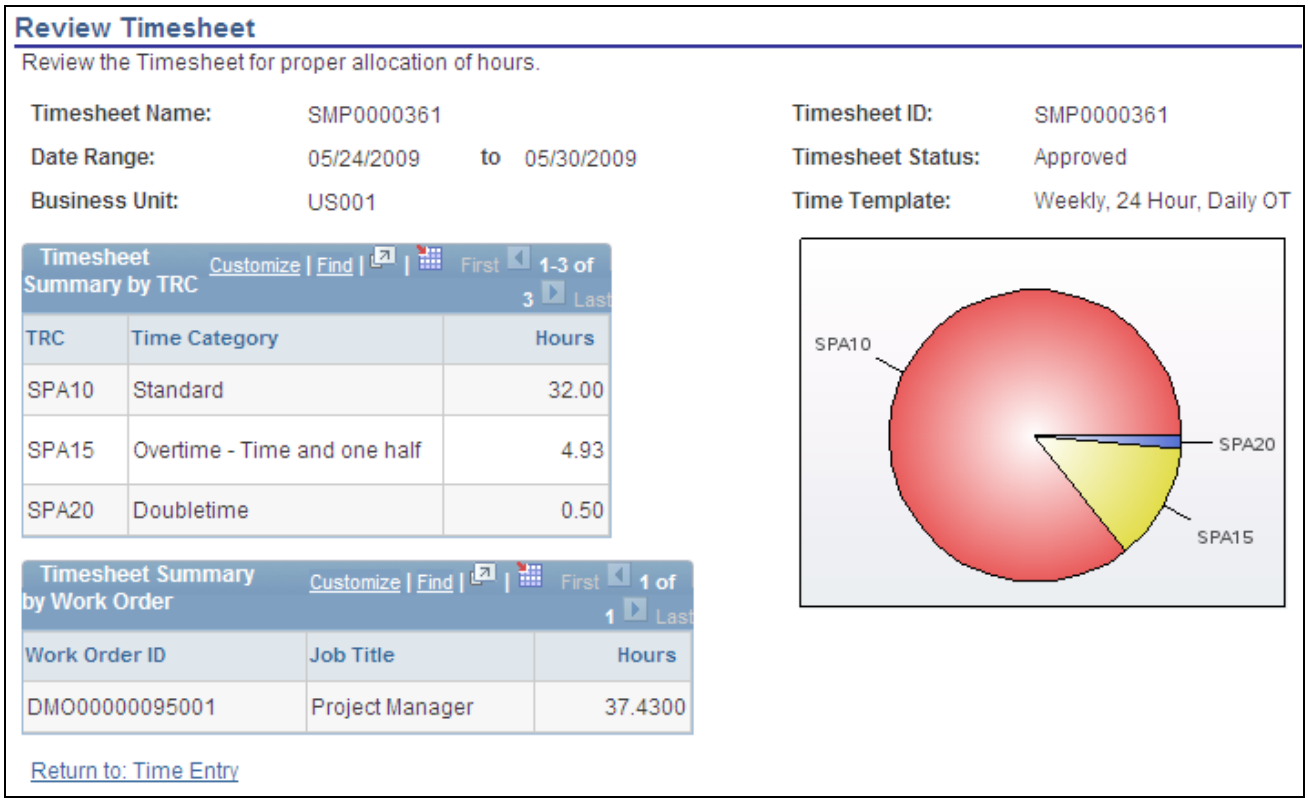
- For Non 24-Hour clock timesheets, click the Go button to access the Review/Override Time Categories page.
- For 24-Hour clock timesheets, click the Review/Override Time Category button.

Report Incidents for Work Order

This grid box appears if the Enable Assignments option is selected on the Services Procurement Bus Unit definition page, if valid assignments are associated with the service during the time period reported, and if the Based on Incidents option is selected on the Assignment by Service definition page.

Reviewing Timesheet Summaries

Access the Review Time page (click the View Summary button on the Review/Adjust Time page).



Review Timesheet page

You can review the timesheet for the correct allocation of time using this page. The page provides basic information about the timesheet, such as the status and the template used to create the timesheet. If you accessed this page using the Review and Submit button on the Review/Adjust Time page, the Submit button appears for you to submit the timesheet for approval.

The page also provides graphical information about the hours.

Time Sheet Summary by TRC

Use this grid box to review timesheet summaries based on time recording codes.

Note. User roles that have the SP_TIME_HIDE_TRC_SUM role action applied to the roles cannot view the Timesheet Summary by TRC grid box or the related graphical display.

TRC (time reporting code)	Displays the time reporting codes that are a part of this timesheet. A time reporting code is a collection of predefined values and rules that determine how the system applies the code.
Time Category	Displays the time category used by the corresponding time reporting code. A time category defines the type of time, such as overtime or standard time.
Hours	Displays the number of hours worked for each time reporting code and time category combination.

Timesheet Summary by Work Order

Use this grid box to review timesheet summaries based on work order.

Work Order ID	Displays the work orders that are included on this timesheet.
Job Title	Displays the job title for the person.
Hours	Displays the number of hours applied to the corresponding work order.

Assignment Incidents Summary

Use this grid box to review incidents logged against assignment IDs. The grid appears when time is based on incidents.

Assignment ID	Displays the assignments for this timesheet. Assignments are the types and conditions of work.
Incidents	Displays the number of incidents for the assignment during the time period.

Overriding Time Categories on Timesheets

Access the Review/Override Time page (click a linked time report on the Manage Timesheets page to view an existing timesheet).

Note. The title of this page displays as Review Time Categories if the user does not have the appropriate role to override time categories.

Note. Fields on this page will appear differently based on the use of a 24-hour or a non-24-hour clock time template. Differences are discussed.

Time Category Status

This field displays the current time category status for the reporting period. Values are:

- *System Assigned:* Indicates that no manual override has occurred.
- *Approver Override:* Indicates that one of the approvers of the timesheet has manually overridden the system assigned value.
- *Manually Assigned:* Indicates that the service provider manually entered the time reporting code. This value is made possible by selecting the Manually enter Timesheet TRCs check box on the Service Time/Progress Template page.

The Enable Time Reporting Override option on the Services Procurement Bus Unit definition page must be selected for this field to be available.

Time Category

If the business unit is not enabled to override time categories, the label for this group box is Time Category. In addition, information is display-only.

Report Time for Work Order

If you do not have the appropriate role action to approve time, the label will be Review Time for Work Order and the Review/Override Time Category field will be unavailable.

In addition, if you do not have the appropriate approval role action, you will only be able to review the time information in this section.

Review/Override Time Category

Select the time period for which you want to override the time category on the Review/Override Time Categories page.

The actual navigation that you will use to access the Review/Override Time Categories page is determined by which service time template was used to create the timesheet. After you select the time period that you want to override:

- For non-24-hour clock timesheets, you must select the time period that you want to override in the Review/Override Time Category field, and then click Go to access the Edit Time Categories page.
- For 24-hour clock timesheets, scroll to the time period that you want to override and then click the Review/Override Time Category button to access the Edit Time Categories page.

Adjust Timesheet

Click this button to accept and save the changes. You will receive a confirmation message after the changes are successfully saved.

The Timesheet Status changes to *Adjusted.*

Reviewing and Overriding Time Categories

When the Time Category Status is *Approver Override,* a warning will appear if an approver makes a subsequent adjustment to the hours. Clicking the Adjust Timesheet button will trigger the warning in this case. You will have an opportunity to cancel the adjustment before the TRC values are recalculated.

Important! If a timesheet has multiple approvers, a warning message will appear to indicate that subsequent changes will affect previous overridden time. For example, if one approver changes the time categories so that overtime will not be charged against a certain work order, another approver may need to make an associated change to pick up the overtime on a different work order.

Adjusting Timesheet After TRCs Have Been Overridden

The system displays a confirmation message when time categories have been successfully overridden.

OK

Click to accept the changes. The system returns the approver to the Adjust Timesheet page.

Cancel

Click to indicate that the hours should not be changed. The system returns to the Adjust Timesheet page.

Submitting and Approving Timesheets

This section discusses how to:

- Submit timesheets for approval.
- Approve, deny, and hold timesheets.

- Edit time categories on timesheets.
- Establish proxy time entry.

Note. Before you can approve timesheets, you must have a role action of SP_TIME_APPROVER.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Roles for Role Actions, page 137

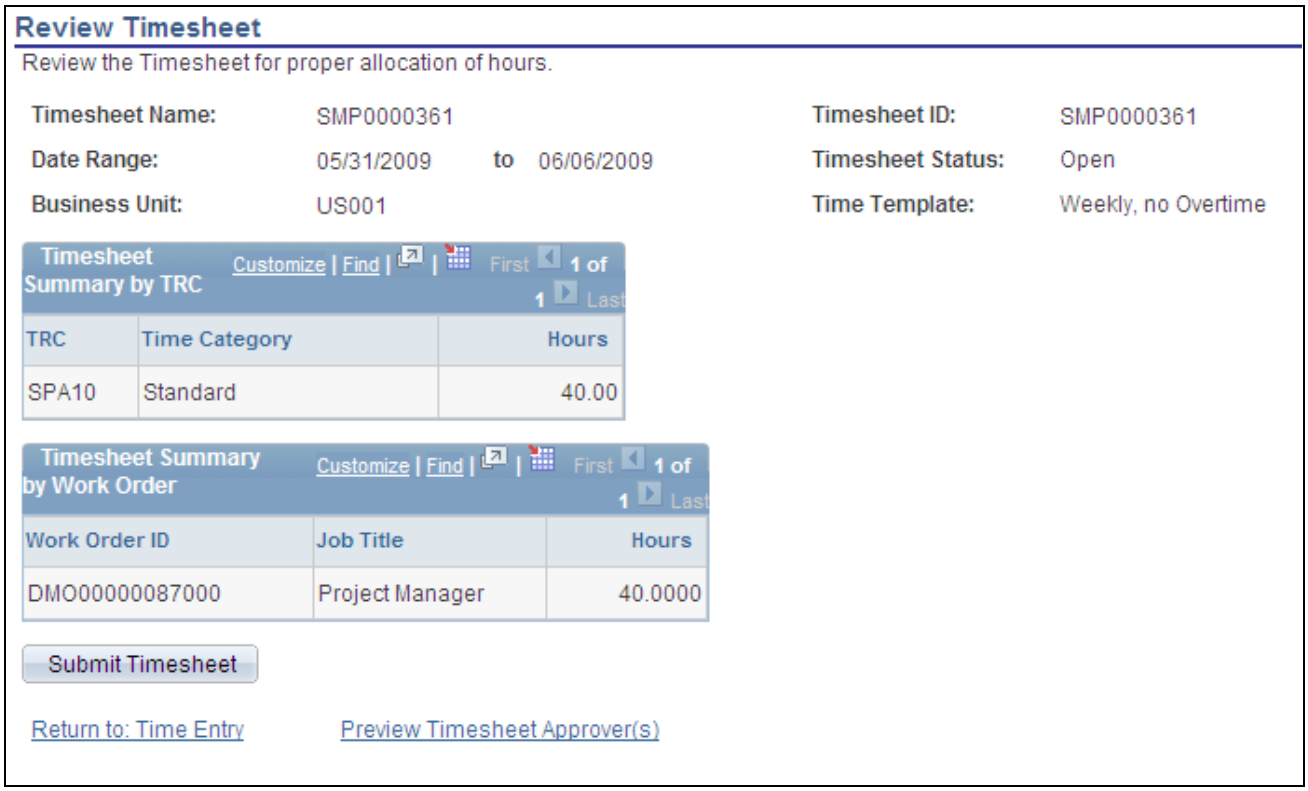
Pages Used to Approve Timesheets

Page Name	*Definition Name*	*Navigation*	*Usage*
Review Timesheet	SPA_TIME_SUBMIT	• Click the View Summary button on the Enter Time page. • Click the View Summary button on the Review/Adjust Time page.	Submit timesheets for approval.
Worklist	WORKLIST	Worklist, Worklist, Filter By Submitted Timesheets	View timesheets that require your approval.
Approve Timesheet	SPA_TIME_APPROVE	Select timesheets from the Worklist page that require your approval.	Approve, deny, and hold timesheets.
Enter Time	SPA_TIME_ENTRY	Click the View/Adjust Timesheet button on the Approve Timesheet page.	View a list of adjustments entered for the timesheet.
Edit Time Categories	SPA_TM_EDIT_TRC	Click the View/Adjust Timesheet button on the Approve Timesheet page. Select the time period for which you want to override the time category and click the Go button.	Edit time categories for a specific time period.
Timesheet Details	SPA_TIME_DETAILS	Click the Timesheet Details button on the Enter Time page.	View the details for the timesheet.

Page Name	*Definition Name*	*Navigation*	*Usage*
View Timesheet Adjustments	SPA_TIME_VWADJUST	Services Procurement, Manage Approvals, select a time report ID, and click the View Adjustments button.	View timesheet adjustment history. The View Adjustments button is available for a time report when adjustments have been made to a timesheet.

Submitting Timesheets for Approval

Access the Review Timesheet page (Services Procurement, Maintain Timesheets, access a timesheet, click the Review and Submit button on the Enter Time for page, and then click the Submit Timesheet button on the Review Timesheet page).



Review Timesheet page

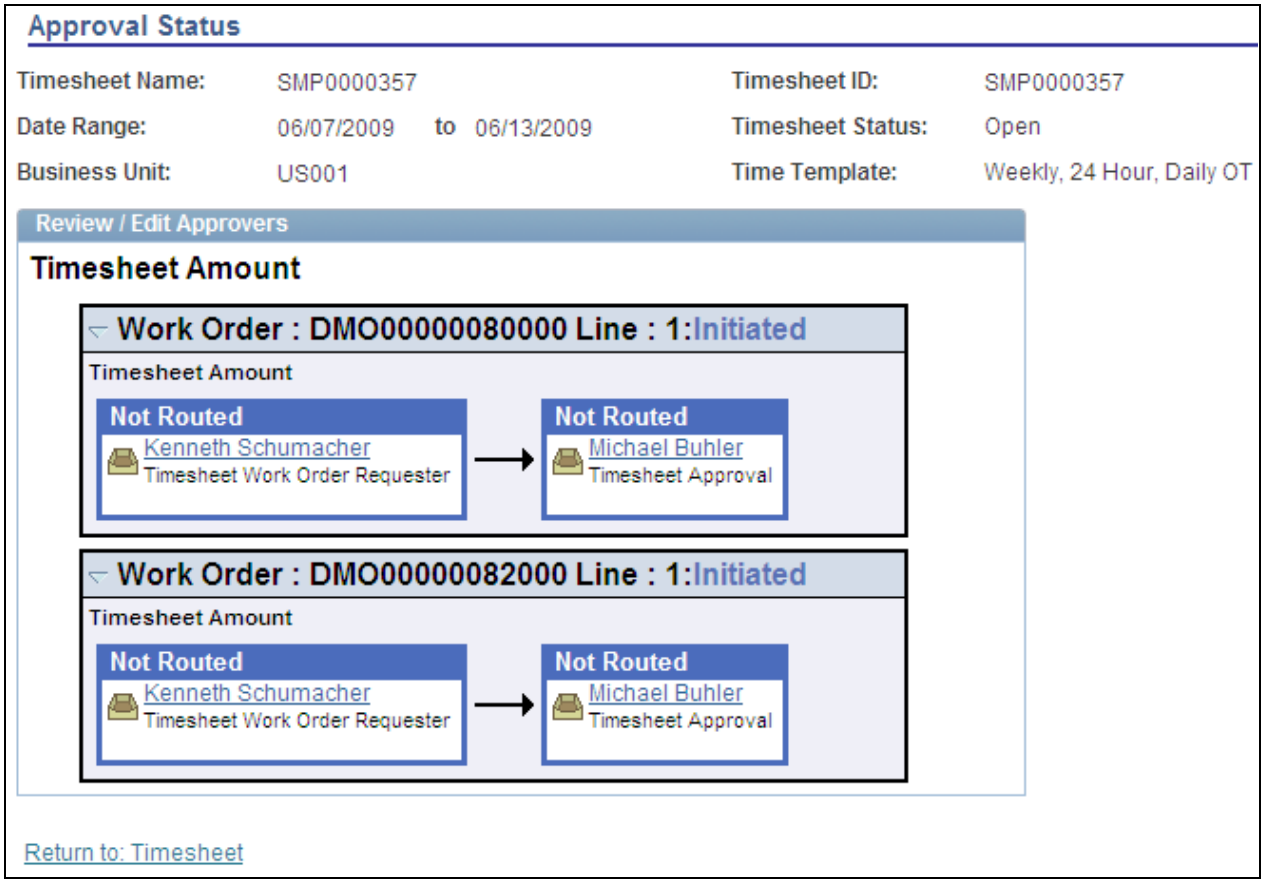
Timesheet approvals use the Approval Framework feature to streamline the approval process. Service providers (or service provider contacts by proxy) can self approve a timesheet if the business unit enables timesheet approval and the service provider has been defined for self approval on the approval process definition. After all approvers complete the approval process, the timesheet history indicates that the status of a timesheet is Approved.

After creating a new timesheet or reviewing timesheets, timesheet approvers and reviewers can be viewed and the timesheet can be submitted for approval. To submit the timesheet without reviewing approvers, click the Submit Timesheet button. The system immediately submits the timesheet and displays the Save Confirmation page for the submission.

To preview approvers and then submit timesheets for approval:

1. Click thePreview Timesheet Approver(s) button.

   The system displays the Approval Status page. This page provides a graphical map of the workflow. The next example illustrates the timesheet Approval Status page for multi-resource timesheets:



   Approval Status page

   The graphical map for the workflow displays timesheet approvers and reviewers and the status of their reviews. It is possible to insert additional approvers or reviewers or create a new approval path for a timesheet. If you insert an ad hoc approver or reviewer is inserted, as an approver or reviewer you can also subsequently remove the ad hoc approver or reviewer.

   The title for the workflow is the name of the stage or path defined in the Approval Process Definition. The timesheet thread description is a concatenation of the business unit, timesheet ID, work order ID, and line number. The graphic includes the work order and overall status of the approval. The graphics provide information about individual approvers and the status of their approvals and vary in color depending on the approval status.

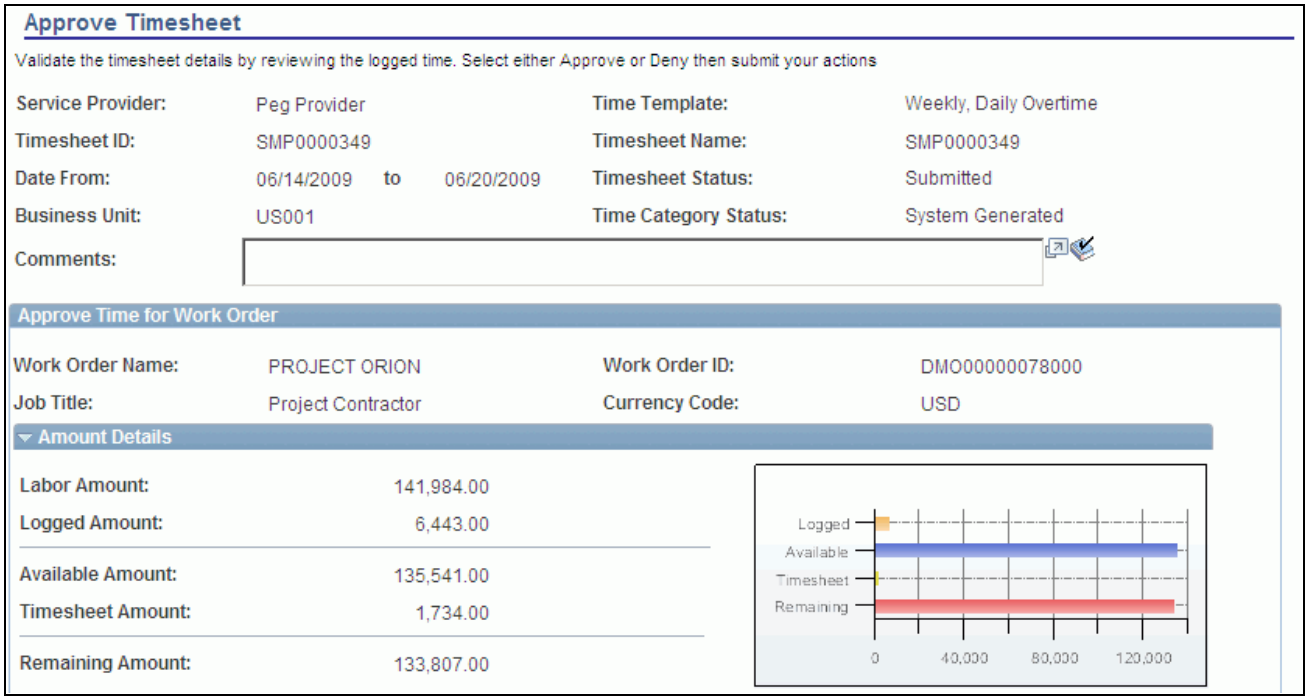
2. Click the Return to: Timesheet link.

3. Click the Submit Timesheet button on the Review Timesheet page.

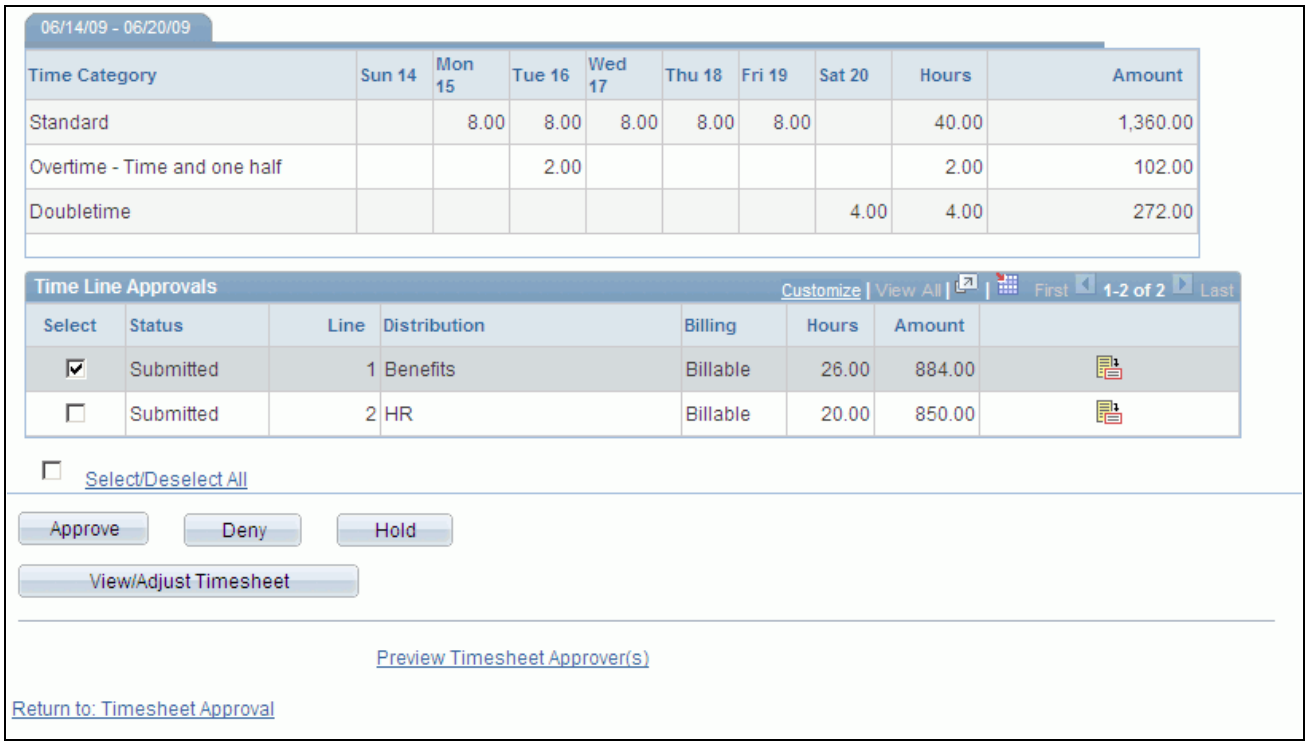
4. Click OK on the Save Confirmation page to complete the submission and go to the Maintain Timesheets page.

Approving, Denying, and Holding Timesheets

Access the Approve Timesheet page (Services Procurement, Manage Approvals or Worklist, Worklist, Filter By Submitted Timesheets and select a timesheet that requires your approval).



Approve Timesheet page (1 of 2)



Approve Timesheet page (2 of 2)

Along with approving, denying, holding, or pushing back a timesheet, you can use this page to review work order and timesheet details. If the work order is a multi-resource work order, the page displays parent work order details and lower-level individual service details. Fields for both are similar. When the Select check box indicates that a line has been selected, approval action buttons at the bottom of the page are available for selection. Clicking Select/Deselect All below the grid will select or deselect the Select check box for all lines of the timesheet. For parent work orders, only the work order ID and name are displayed.

Time Template Displays the template used by the work order.

Time Category Status This display-only field indicates whether the time categories in this timesheet were manually overridden, system assigned, or manually entered by a service provider. This field appears only if the Enable Time Category Override check box is selected on the Services Procurement Bus Definition page.

Approve When you select the Select check box, approval actions become available for you to perform. Select Approve to approve any time lines selected for the work order. When approving a timesheet, the system changes status the status to *Approved* and makes the timesheet available for invoicing.

Deny Click to deny the approval of the selected timesheets. The system changes the status to *Denied by Approver*. If you deny the time line, the system might require you to provide a reason code and enter a comment if the business unit is set up to require codes for negative business transactions. When you deny the approval, the system returns the time line to the service provider for modifications and re-submission.

Hold	Click to place the timesheet on hold, indicating that the approve or deny decision is being deferred until further consideration. When you put a timesheet on hold, the system keeps it in your queue awaiting further action.
Pushback	Click to send the submitted timesheet back to the previous approver for more information. The status of the timesheet remains as Submitted.
View/Adjust Timesheet	Click to access the Enter Time page, where you can make adjustments to the timesheet. Use this page to override time categories if the Enable Time Reporting Override check box is selected on the Services Procurement Bus Defn page. See Chapter 4, "Setting Up PeopleSoft Services Procurement," Setting Up Business Unit Definitions, page 32.
View Attachments	Click to view attachments. This button is available after an attachment has been added to the timesheet. When you click the button, you access the Timesheet Attachments page where you can view information about the attachment and open it for viewing.
Preview Timesheet Approver(s)	Click to view a graphical map of the approval workflow.
View Adjustments	Click to view timesheet adjustment history. The button is available when adjustments have been made to a timesheet. You can search for and view specific timesheet line adjustments, comments made about the adjustment and whether the adjustment was made after the timesheet was approved. The View Timesheet Adjustments page also displays timesheet information, such as its basic details and overall status.

Amount Details

Use this section to view a graphical presentation of timesheet amounts, including logged, available, timesheet, and remaining amounts. If you are approving a multi-resource work order with individual services, you can switch graphical views. Click the View Multi Resource Service Graph link to view details about the parent work order. Click the View Individual Service Graph to view graphical details about lower-level services.

The section also provides tab data that you can use to select the timeframe that includes the timesheet you want to view. After you select the tab, the system populates the grid with time category and calendar information for individual timesheets.

Time Line Approvals

Use this section to approve, deny, hold, or push back timesheet lines. The columns that appear differ depending upon whether assignments are associated with projects for the reported time period.

Note. If any incidents are associated with the time line, the system displays Incidents for Work Order grid.

Select Select to indicate that you want to perform an approval task for a time line. When you select the check box, the system makes the Approve,Deny, Hold, and Pushback buttons available at the bottom of the page. If the check box is selected, click the check box to deselect the time line. Any lines that are selected when you click an action button will have that action performed for them.

Status Displays the status of the time line approval.

Amount Displays the monetary value for this timesheet.

Quantity This column displays the number of incidents for each time line. This column appears if assignments (based on incidents) are associated with the time reporting period.

Click to access the Timesheets Details page, where you can view the details of the timesheet and select the rating for the work that the service provider performed for this time line.

Select/Deselect All Use this link to select or deselect all the available timesheets.

Incidents for Work Order

This group box appears if time is being reported that is based on assignment incidents. If no incidents are reported for the work order for the timesheet, the group box will not appear.

Incidents This column summarizes and displays the number of incidents per assignment for each work order on the timesheet.

Amount This column summarizes and displays the total amount of incidents for each assignment for each work order on the timesheet.

Incident Approvals

This group box appears if any assignment incidents are associated with the time being reported. If no incidents are reported for the work order for the timesheet, the group box will not appear.

Action Select an option to approve or deny the incident. Values include:

Approve: Changes status to *Approved* if no subsequent approvals are needed by other approvers. Once fully approved, the incident is available for invoicing.

Deny: Changes status to *Denied by Approver*. If you deny the time line, enter a comment to indicate a reason. The time line returns to the service provider for modifications and re-submission.

Hold: Changes status to On Hold. The time line remains with the current approver awaiting further action.

Editing Time Categories on Timesheets

Access the Edit Time Categories page (click the View/Adjust Timesheet button on the Approve Timesheet page).

Note. This page is available only if the Enable Time Reporting Override option is selected on the Services Procurement Bus Unit definition page and if the user has the appropriate role action that enables time category overrides.

Time Quantity	Enter the new quantity for the time category. You can add additional time quantities for each time reporting code.
Save	Click to save your changes.

Establishing Proxy Time Entry

Service Provider Contacts can create timesheets for service providers within the supplier office location.

When an approver approves, denies, or holds a timesheet, the person who created the timesheet will receive a notification.

When a service provider contact resubmits the timesheet, the denied worklist entry is removed from all other provider contacts within the same supplier office location.

Manage Timesheet Worklists

This section discusses how to trigger worklist and email notifications.

Triggering Worklist and Email Notifications

The following status changes trigger a worklist entry or email notification based on the definition of the transaction configuration for the SP_TIMESHEET process:

- The service provider receives a worklist entry and an email notification if the timesheet status changes to *Deny*.

  The service provider receives notification if the timesheet status changes to *Approved.*

- The approver receives notification when a timesheet is submitted.
- The user can either access the timesheet using the email link or by navigating using the worklist.

The email notifications contain values from the Enter Time page and a URL that the recipient should use to access the timesheet.

Managing Timesheets from External Sources

This section provides an overview of external timesheet management and discusses how to:

- Set up Integration Broker for the SOA for Inbound Timesheets feature.
- Import and convert time data from external sources.
- View a timecard (provider).

Understanding External Timesheet Management

Many PeopleSoft Services Procurement customers use external time tracking and project management tools. This often requires service providers to enter time in two systems: PeopleSoft Services Procurement for billing and the supplier system or other external system to track time for a project. The SOA (Service Oriented Architecture) for Inbound Timesheets feature enables third parties to capture time information on an external web-based system using an industry-standard generic HR-XML 2.5 timecard schema and then send the XML file to your system without having to enter the information directly into Services Procurement. Your system then uses the XML file to generate and submit a timesheet.

The feature includes:

- The ability for service providers to submit time information electronically to your system through a web service.
- A process for converting the time information into XML that can be used to generate a timesheet.
- Processing for timesheets (including approvals and history) that is the same as time processing that is used when you manually enter information into PeopleSoft Services Procurement. The timesheet is processed and invoiced just like a time sheet entered directly in Services Procurement.
- The use of XML schema elements and attributes that map to Services Procurement application fields.

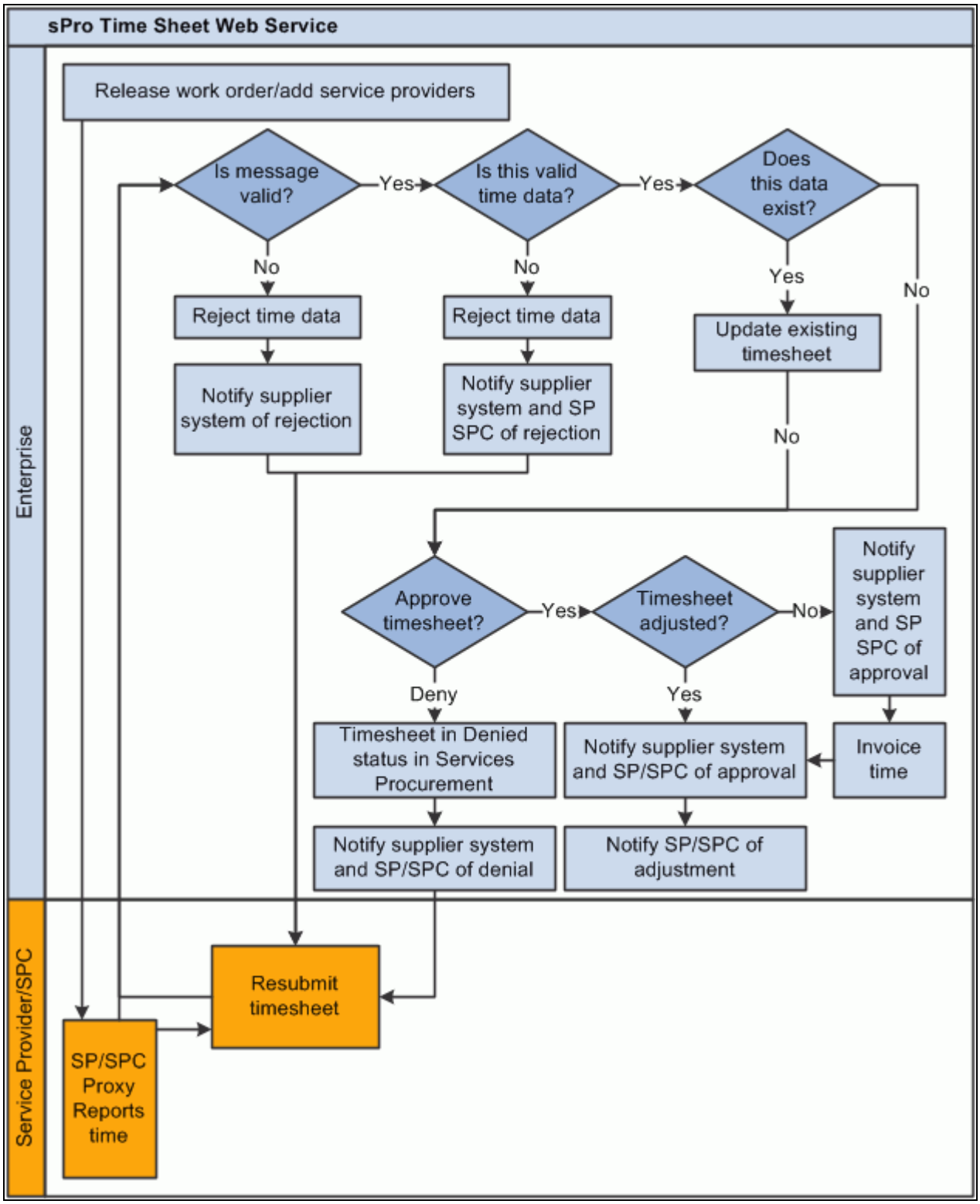
The primary benefit is that service providers can enter time in one system instead of two with little difference in processing time for manually entered timesheets. Specifically, the feature:

- Enables the quick and cost-effective receipt of time reporting data from any external web-based, time-capture system that uses industry-standard generic HR-XML 2.5 timecard schema.
- Is broad enough to be used globally without having to establish, engineer, and implement many separate transformation mechanisms.
- Validates the data and enables sending a response message to the external system for any invalid data.
- Handles the time data the same as it would a timesheet that is entered manually in PeopleSoft Services Procurement after the system accepts the data.
- Provides an email notification to notify the external system of any timesheets that were denied in Services Procurement.
- Provides an email notification to notify the external system of any timesheet adjustments that were made in Services Procurement.

- Receives resubmitted timesheets that were rejected previously or that were changed after being submitted to Services Procurement.

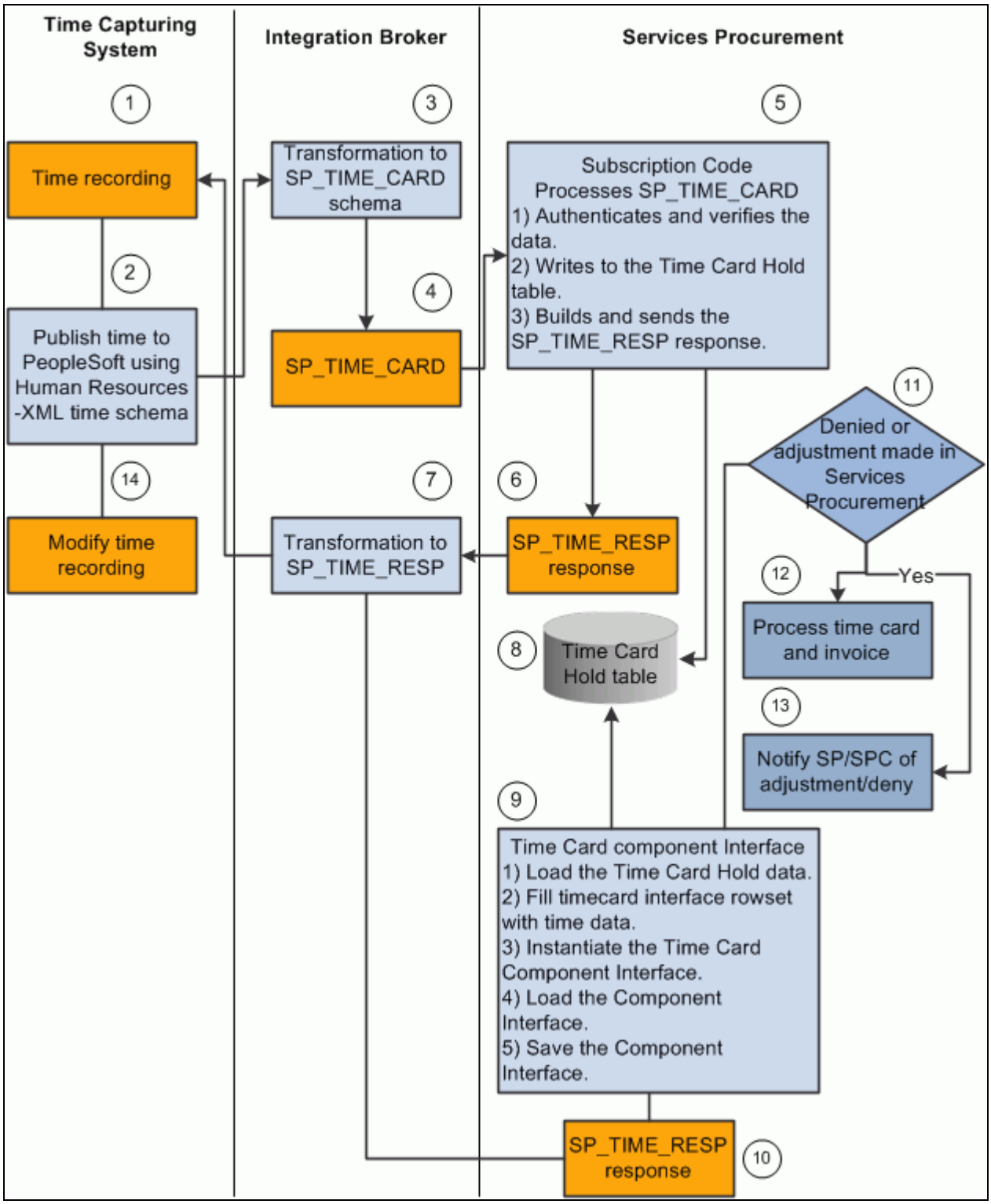
How the SOA for Inbound Timesheets Feature Works

The following diagram shows how data flows between the service provider and PeopleSoft Services Procurement:



Data flows between the service provider and PeopleSoft Services Procurement

The following diagram shows the main components of the SOA for Inbound Timesheets feature and shows how data flows between these components:



Main components of the SOA for Inbound Timesheets feature

The following process is a high-level overview of the steps depicted in the preceding diagrams:

1. Time data is recorded in an external time-capturing system.

2. A message is created in the time-capturing system and sent to your system in the format of the HR-XML 2.5 timecard schema. This message is sent asynchronously two-way (request and response) from the external time-capturing system to the Services Procurement database.
3. The PeopleSoft Integration Broker receives the HR-XML time data and transforms it into the PeopleSoft Message SP_TIME_CARD.
4. The On Notify request handler is invoked to receive the transformed message. The On Notify application class processes the time card message and invokes the SP:SP_INTEGRATION: TimeCard application class.
5. The TimeCard application class validates and verifies the data, and it rejects the invalid data.
6. The TimeCard application class builds and sends a response message for the rejected data.
7. The response message is published to the Gateway.
8. The accepted data is written into the Timecard hold table.
9. Timecard data is loaded into the timecard rowset. The rowset supplies the Timecard Component Interface properties. Timecard Component Interface validates all the business logic and accepts or rejects the time information. It then saves the timesheet for the valid timecard.
10. For rejected timecards, the Timecard Component Interface builds and sends a response message. The response message is published to the Gateway.
11. The timecard is routed to the approver (based on the timesheet status and the timecard approval setting at the business unit level).
12. The service provider SPC is notified of any timesheet adjustments made in PeopleSoft Services Procurement or timesheets that are denied in Services Procurement.
13. Approved timesheets are processed and invoiced.
14. Any updates to the timesheet in the external system are resubmitted to Services Procurement and steps 2 through 13 are repeated.

The following table shows the validations that the TimeCard application class performs on HR-XML time data sent from an external system (step 5 in the preceding process):

Condition	***Error or Warning***	***Action***
Invalid message format.	Error : Invalid Time Message.	Reject the TimeCard message.
External ID is missing.	Error: External TimeSheet required.	Reject the TimeCard message.
Business unit is missing.	Error: Business Unit is required.	Reject the TimeCard message.
Work order is missing.	Error: Work Order is required.	Reject the TimeCard message.
Period start and end dates are missing.	Error: Period Start and End Dates are required.	Reject the TimeCard message.
Required fields are missing,	Error: Required "field name" is missing.	Reject the TimeCard message.

Condition	***Error or Warning***	***Action***
Field format or date is invalid.	Error: "Field" format is invalid.	Reject the TimeCard message.
A timesheet already exists for the time period for the provider for the given template.	Warning: TimeSheet exists for the %Time Period.	Send a warning when the action for the incoming time data is Add and the timesheet already exists in Services Procurement for the time period.
The person ID of the service provider is invalid.	Person is not valid in PeopleSoft Services Procurement system.	Send an error message for the invalid service provider.
Work order ID is invalid.	Error : Work order not found.	Reject the TimeCard message.
Work order and purchase order for the time period were missing.	Error : Work order not found for the Time period.	If an overlap occurs in the time period or if the start date and end date are both outside of work order time period, then reject the TimeCard message.
The time date entered for the reported time (time interval, time event) is outside of the work order period.	Error : Reported time is outside of the work order period.	Reject the TimeCard message.
The work order consumption amount is exceeded.	Error : Work order over amount.	Reject the TimeCard message.
The time template period is in error.	Error: The reported time format is wrong for the time template.	Reject the TimeCard message.
An Expense time element was found.	Warning: "Expenses" are currently not supported.	Accept the time message, ignore the expense message, and generate a warning.
For an action code of Change, the Services Procurement timesheet that was sent by the external system was not found in Services Procurement.	Error : Invalid sPro Timesheet id.	Reject the TimeCard message.
For an action code of Change, the status is anything other than Rejected.	Error: Timecard in Raw/Submitted/Processed/Approved status cannot be processed in Change mode.	Reject the TimeCard message.
For an action code of Add, the status is Processed or Final.	Error: Timecard in Processed/Final status cannot be processed in Add mode.	Reject the TimeCard message.
Any information data sent from the external system is not used by Services Procurement.	Warning message	Accept the time data and generate the warning message for unused data.

Technical Dependencies

To use the SOA for Inbound Timesheets feature, you need:

- Tools Integration Broker web services, release 8.5 or later.
- The new Approval Framework feature implemented for timesheets for release 9.1 of PeopleSoft Software.

Field Mappings

The following table shows the elements and attributes of an external system that need to be mapped to fields in PeopleSoft Services Procurement to use the SOA for Inbound Timesheets feature:

External System Element or Attribute	*Services Procurement Field*
Timecard ID	SP_EXT_TIME_HDR.SP_EXTERNAL_ID SPA_TIME_HDR.SP_EXTERNAL_ID
Reported Resource Person ID	SP_EXT_TIME_HDR.PERSON_ID SPA_TIME_HDR.PERSON_ID
Reported Time Status	SP_EXT_TIME_HDR.SP_EXT_STATUS SPA_TIME_HDR.TIME_HDR_STATUS
Period Start Date	SP_EXT_TIME_HDR.PERIOD_START_DT SPA_TIME_HDR.PERIOD_START_DT
Period End Date	SP_EXT_TIME_HDR.PERIOD_END_DT SPA_TIME_HDR.PERIOD_END_DT
Time Interval Type	SP_EXT_TIME_DTL.SP_TRN_TYPE SPA_TIME_DTL.Activity_id
Time Interval Billable	SP_EXT_TIME_DTL.SPA_BILLING_ACTION SPA_TIME_DTL.SPA_BILLING_ACTION
Time Interval Action Code	SP_EXT_TIME_DTL.SP_ACTION_CODE
Time Interval ID	SP_EXT_TIME_DTL.SP_EXTERNAL_ID SPA_TIME_DTL.SP_EXTERNAL_ID
Start Date Time	SP_EXT_TIME_DTL.STARTDATETIME SPA_TIME_DTL.STARTDATETIME
End Date Time	SP_EXT_TIME_DTL.ENDDATETIME
Duration	SP_EXT_TIME_DTL.SP_TIME_DURATION

External System Element or Attribute	*Services Procurement Field*
Approval Information Person ID	SP_EXT_TIME_DTL.Approval_OPRID
Time Event Type	SP_EXT_TIME_DTL.SP_TRN_TYPE
Time Event Billable	SP_EXT_TIME_DTL.SPA_BILLING_ACTION SPA_TIME_DTL.SPA_BILLING_ACTION
Time Event Action Code	SP_EXT_TIME_DTL.SP_ACTION_CODE
Event DateTime	SP_EXT_TIME_DTL.START_DATETIME (IF clock-in) or SP_EXT_TIME_DTL.ENDDATETIME (IF clock-out)
Expense Billable	SP_EXT_TIME_DTL.SPA_BILLING_ACTION SPA_TIME_DTL.SPA_BILLING_ACTION
Expense Action Code	SP_EXT_TIME_DTL.SP_ACTION_CODE
External Order Number	SP_CUST_REP_SUB.WORK_ORDER_ID SPA_TIME_WO.WORK_ORDER_ID
Customer Reporting Requirements Entity	SP_EXT_TIME_DTL.BUSINESS_UNIT

Pages Used to Manage Timesheets from External Sources

Page Name	*Definition Name*	*Navigation*	*Usage*
Integration Broker Quick Configuration	PTIB_ADMIN	PeopleTools, Integration Broker, Configuration, Quick Configuration, Domains	Activate the domain.
Gateways	IB_GATEWAY	PeopleTools, Integration Broker, Configuration, Gateways	Activate the local gateway.
Service Configuration	IB_SVCSETUP	PeopleTools, Integration Broker, Configuration, Service, Configuration	Set up the service configuration and listening connector.
Queue Status	IB_MONITOR_QUEUES	PeopleTools, Integration Broker, Service Operations Monitor, Administration, Queue Status	Activate the queue for your message.

Page Name	Definition Name	Navigation	Usage
Services	IB_SERVICEDEFN	PeopleTools, Integration Broker, Integration Setup, Services On the Services search page, enter *SP_TIME_CARD* in the Service field and click Search.	Activate your service, handler, and routing.
Transformation Test	IB_TRANSFORM_PAGE	PeopleTools, Integration Broker, Service Utilities, Transformation Test On the Transform Test Utility search page, enter *SP_TIME_CARD* in the Search by field and click Search.	Convert XML from a service provider.
Handler Tester	IB_EVENTTESTER	PeopleTools, Integration Broker, Service Utilities	Use the converted XML to create a timecard.

Setting Up Integration Broker for the SOA for Inbound Timesheets Feature

Before using the SOA for Inbound Timesheets feature, you need to set up PeopleSoft Integration Broker to accept time information from external service providers. This section discusses how to:

- Activate the domain.
- Activate the local gateway.
- Set up the service configuration and listening connector.
- Activate the queue for your message.
- Activate your service, handler, and routing.

For general information about setting up the Integration Broker,

See *PeopleTools PeopleBook: PeopleSoft Integration Broker Administration*, "Understanding Setting Up PeopleSoft Integration Broker."

Activating the Domain

To process asynchronous messages, one application server domain must be active.

See *PeopleTools PeopleBook: PeopleSoft Integration Broker Administration*, "Understanding Setting Up PeopleSoft Integration Broker," Activating Pub/Sub Server Domains.

Activate the Local Gateway

To activate the local gateway:

See *PeopleTools PeopleBook: PeopleSoft Integration Broker Administration*, "Understanding Setting Up PeopleSoft Integration Broker," Defining Integration Gateways and Loading Connectors.

See *PeopleTools PeopleBook: PeopleSoft Integration Broker Administration*, "Understanding Setting Up PeopleSoft Integration Broker," Configuring Integration Gateway Properties.

Setting Up the Service Configuration and Listening Connector

To set up the service configuration and listening connector:

See *PeopleTools PeopleBook: PeopleSoft Integration Broker Administration*, "Configuring PeopleSoft Integration Broker for Handling Services."

See *PeopleTools PeopleBook: PeopleSoft Integration Broker Administration*, "Understanding Setting Up PeopleSoft Integration Broker," Defining Integration Gateways and Loading Connectors.

See *PeopleTools PeopleBook: PeopleSoft Integration Broker Administration*, "Using the Delivered Listening Connectors and Target Connectors."

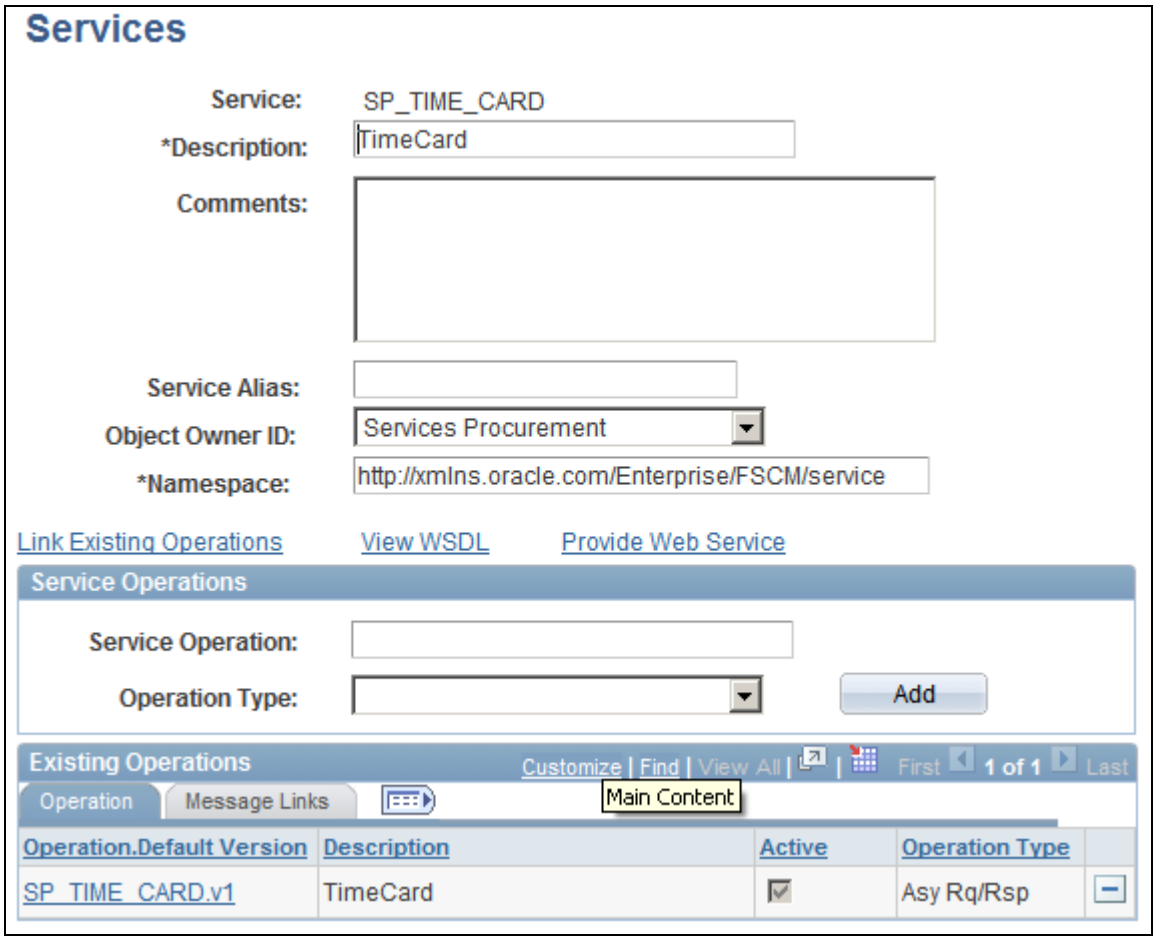
Activating the Queue for Your Message

To activate the queue for your message:

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

Activating Your Service, Handler, and Routing

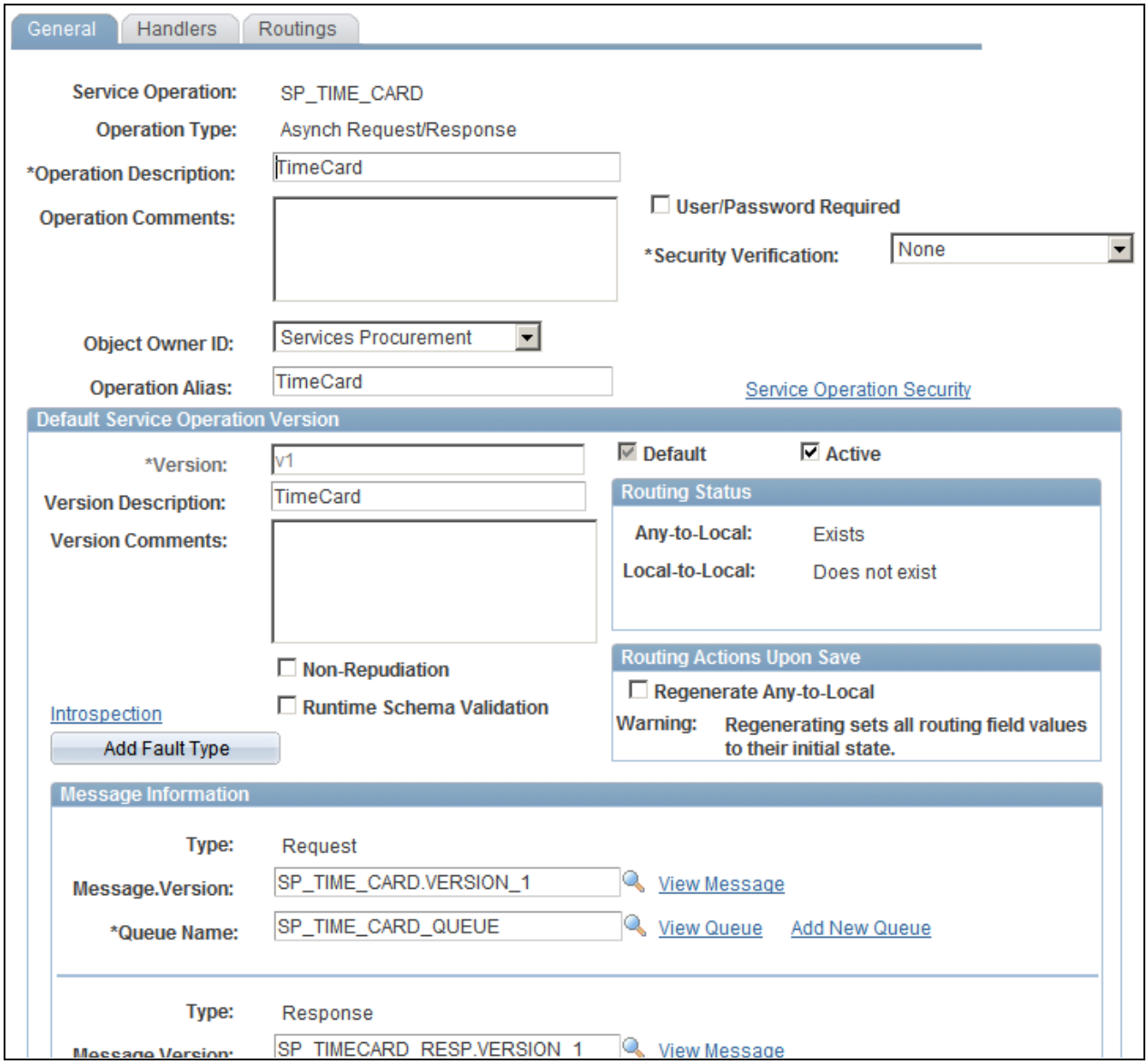
Access the Services page (PeopleTools, Integration Broker, Integration Setup, Services and on the Services search page, enter *SP_TIME_CARD* in the Service field and click Search).



Services page

1. On the Services page, select *Services Procurement* in the Object Owner ID field.

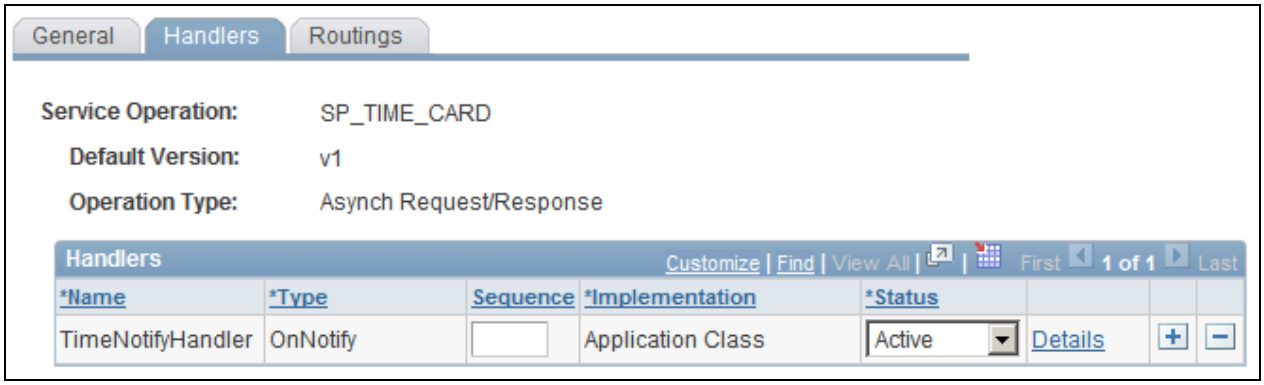
2. Click the SP_TIME_CARD.v1 link on the Operation tab at the bottom of the page.



Services page General tab

3. On the General tab, select the Active check box in the Default Service Operation Version group box.

4. Select the Handlers tab.



Services page Handlers tab

5. Select Active from the Status drop-down list box.

Note. The handler must be active for the Message subscription PeopleCode/Application package logic to run. If the handler is not active, the message will appear to be done, but nothing will be processed by the code.

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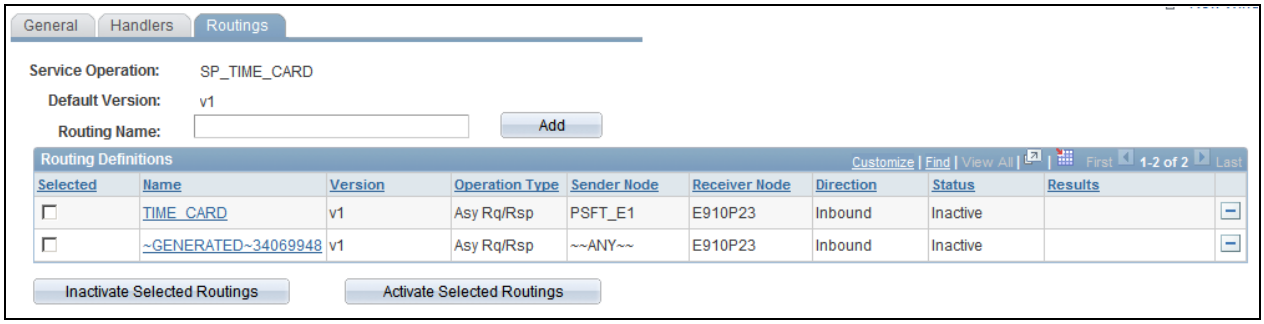
6. Select the Routings tab.



Services page Routings tab

7. In the Routing Definitions group box, select the check box next to the routing name that you want to use and click Activate Selected Routings.

Note. The routing and operation must be active or you will receive a message in the Send Master stating that the routing cannot be found.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Broker Administration, "Configuring PeopleSoft Integration Broker for Handling Services."

PeopleTools PeopleBook: PeopleSoft Integration Broker, "Managing Services."

PeopleTools PeopleBook: PeopleSoft Integration Broker, "Managing Service Operation Handlers."

PeopleTools PeopleBook: PeopleSoft Integration Broker Administration, "Configuring PeopleSoft Integration Broker for Handling Services," Understanding Configuring PeopleSoft Integration Broker for Handling Services, Setting Service Configuration Properties.

PeopleTools PeopleBook: PeopleSoft Integration Broker, "Managing Service Operation Routing Definitions," Creating Routing Definitions

Importing and Converting Time Data from External Sources

The service provider sends time information to your system in HR-XML 2.5 format. Your system then:

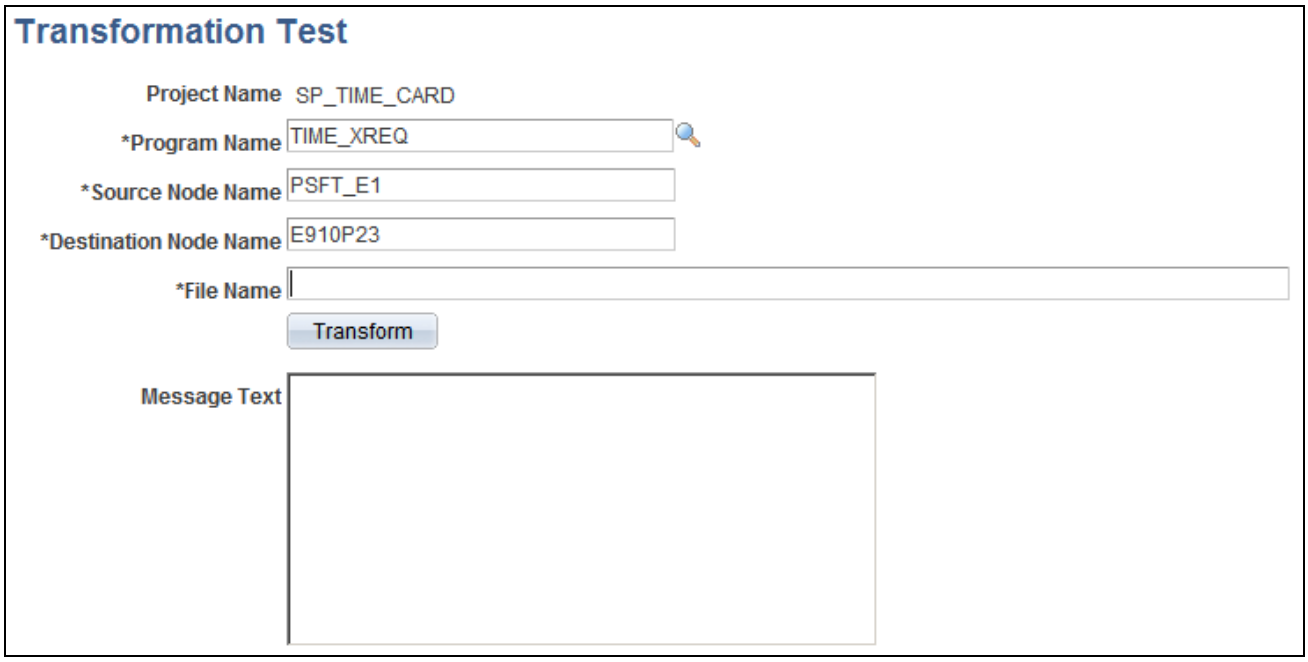
- Imports the XML file into PeopleTools.
- Converts the XML from the service provider into XML that can be used to create a timecard.
- Uses the converted XML to create a timecard that can be used in PeopleSoft Services Procurement.

When the timecard is created, it is automatically submitted for approval and a copy is sent to the service provider. This section discusses how to:

- Convert XML from a service provider into XML that can be used to create a timecard.
- Use the converted XML to create a timecard.

Converting XML from a Service Provider

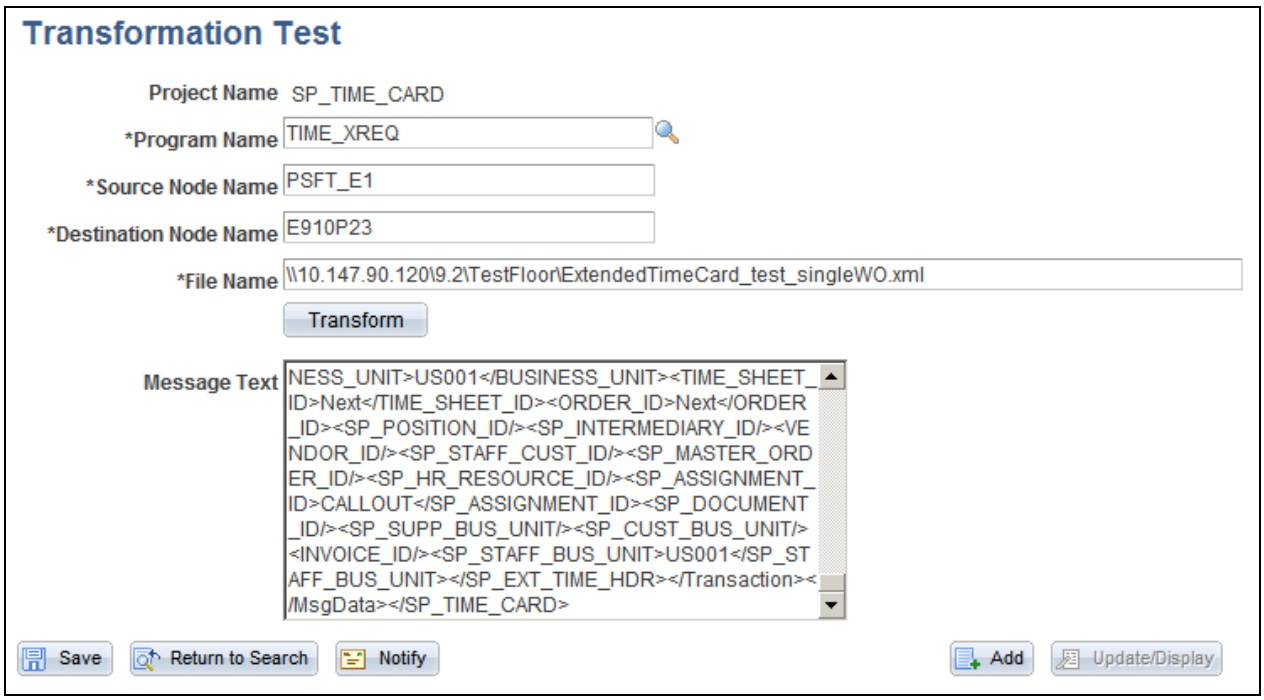
Access the Transformation Test page (PeopleTools, Integration Broker, Service Utilities, Transformation Test and on the Transform Test Utility search page, enter *SP_TIME_CARD* in the Search by field and click Search.).



Transformation Test page

1. In the File Name field, enter the path and file name where the XML from the service provider is stored.
2. Click Transform.

   The converted XML appears in the Message Text text box.



Transformation Test page displaying converted XML

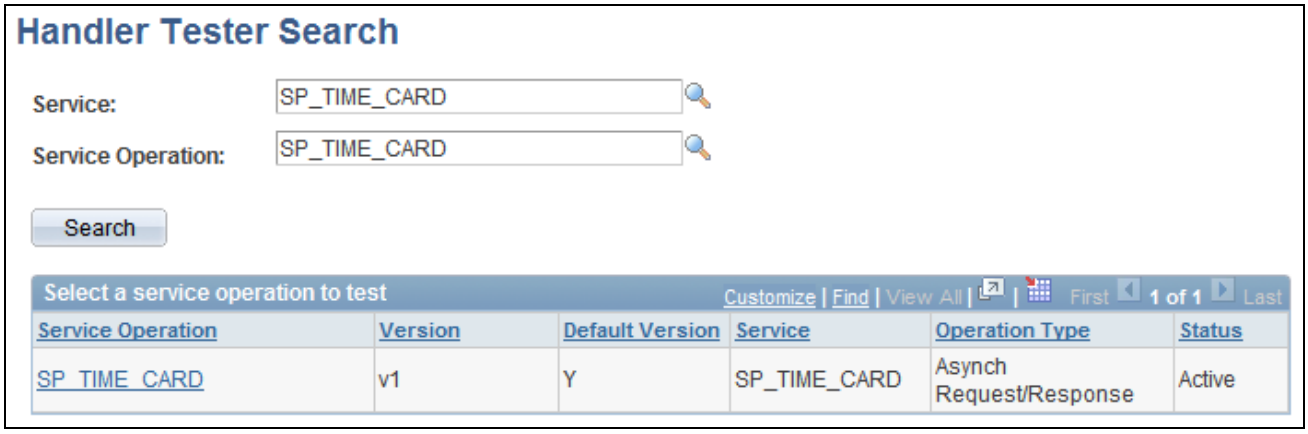
3. Copy the XML in the Message Text text box into your buffer, for example, Notepad.

4. Click Save.

Using the Converted XML to Create a Timecard

Access the Handler Tester page (PeopleTools, Integration Broker, Service Utilities, Handler Tester and on the Handler Tester Search page, enter *SP_TIME_CARD* in both the Service and Service Operation fields and click Search).

The Select a service operation to test group box appears displaying the service operation to test.

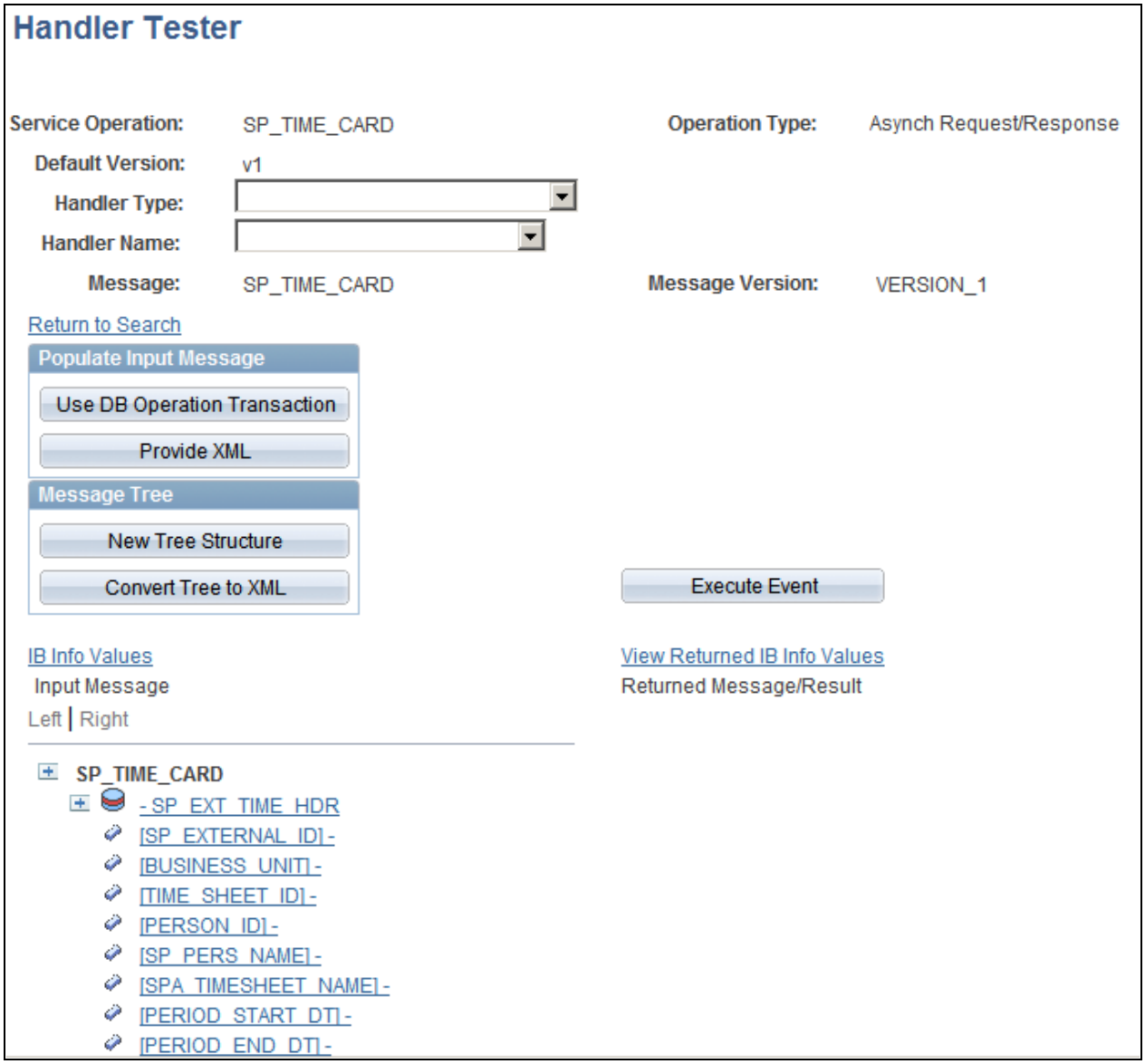


Handler Tester Search page

Note. This procedure is only one way to perform the conversion. You can also do it using Sendmaster or with a BPEL process flow.

See *PeopleTools PeopleBook: Integration Broker Testing Utilities and Tools*, "Using the Handler Tester Utility," Uploading XML Data from Files.

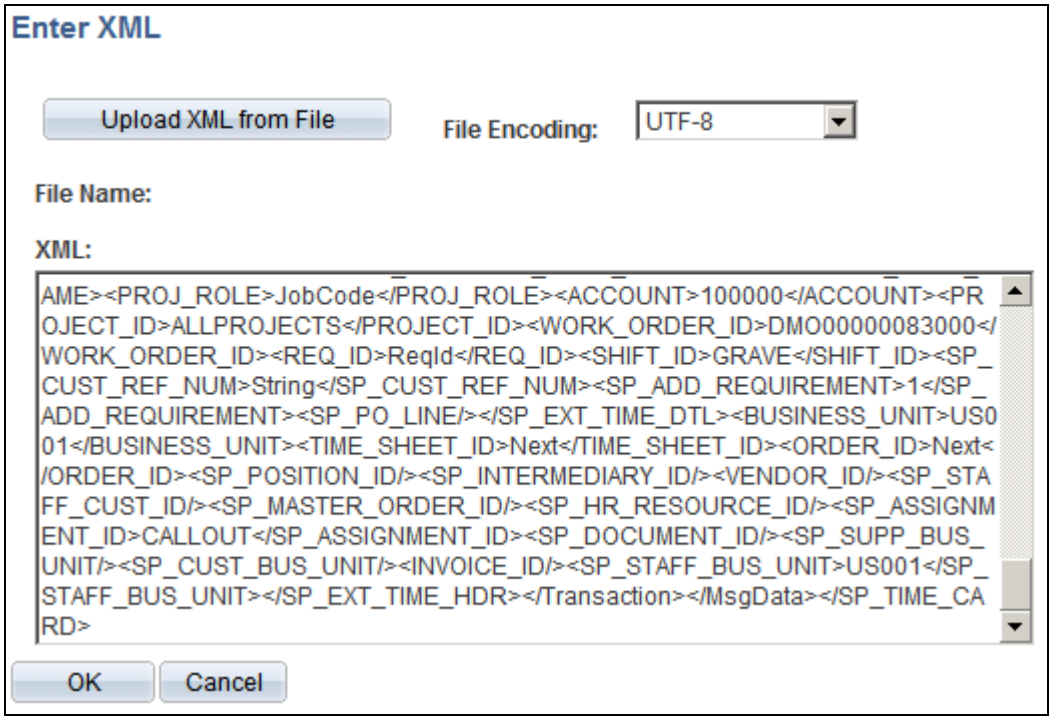
1. Click the SP_TIME_CARD link under Service Operation.



Handler Tester page

2. Select *On Notify* in the Handler Type drop-down list box.
3. Select *TimeNotifyHandler* in the Handler Name drop-down list box.
4. Click the Provide XML button in the Populate Input Message group box.

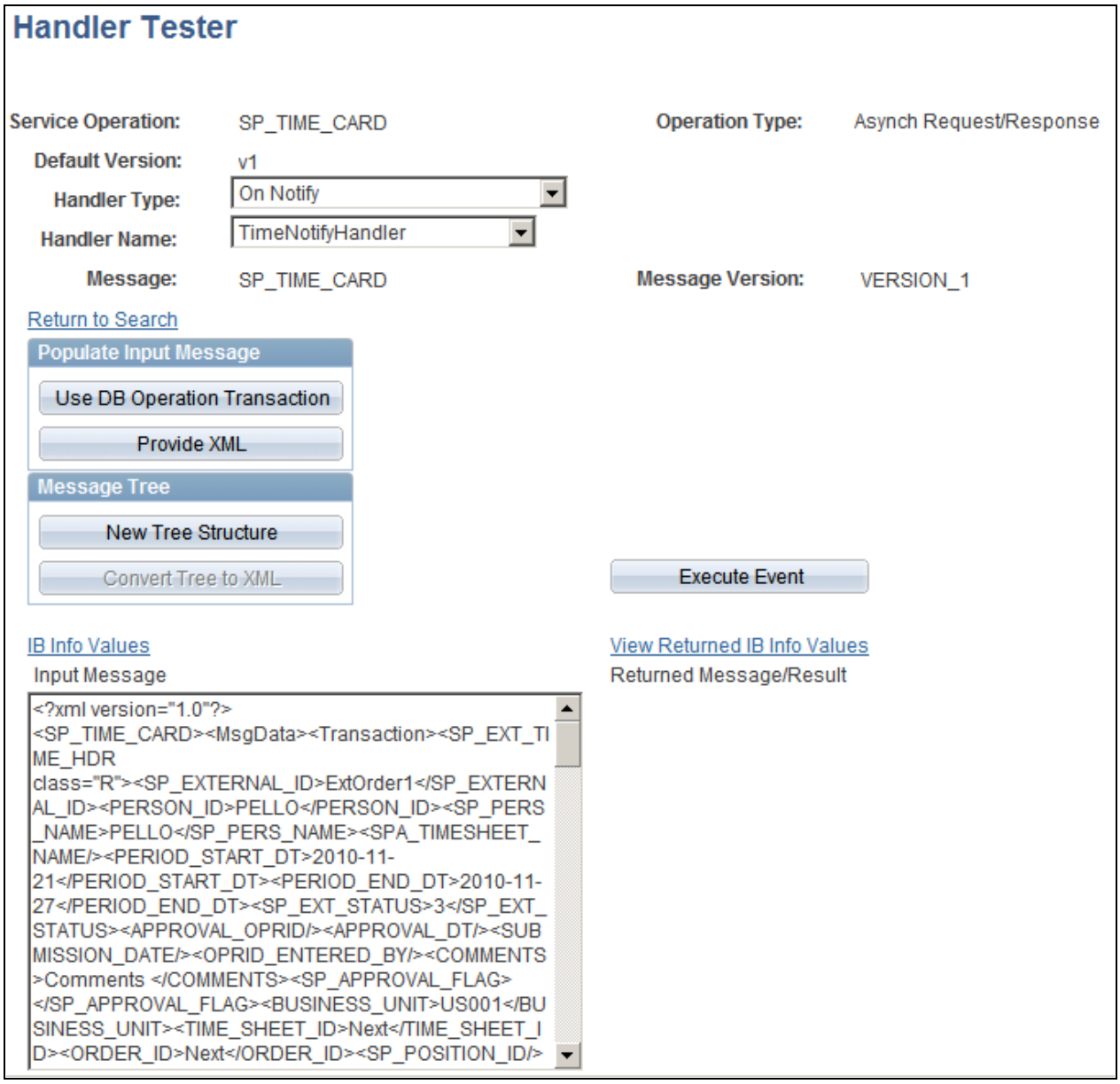
5. On the Enter XML page, copy the XML from your buffer into the XML text box.



Enter XML page

6. Click OK.

   The Handler Tester page appears with the XML in the Input Message text box.



Handler Tester page displaying XML in Input Message box

7. Click Execute Event.

   The process creates a timecard that can be used in Services Procurement. It automatically submits the timecard for approval and sends a copy of the time sheet to the service provider to view.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Broker, "Transformation Example: Integration Between Two PeopleSoft Nodes," Testing the Transformation.

Viewing a Timecard (provider)

When your system generates a timecard for a service provider, the system sends a copy of the timecard to the service provider. The service provider can then view the timecard in PeopleSoft Services Procurement. The imported timecard has a status attached to it. The following table shows the valid statuses for the imported timecard and the corresponding valid actions in the client Services Procurement system. If no status is specified in the external system, then the default status is Pending.

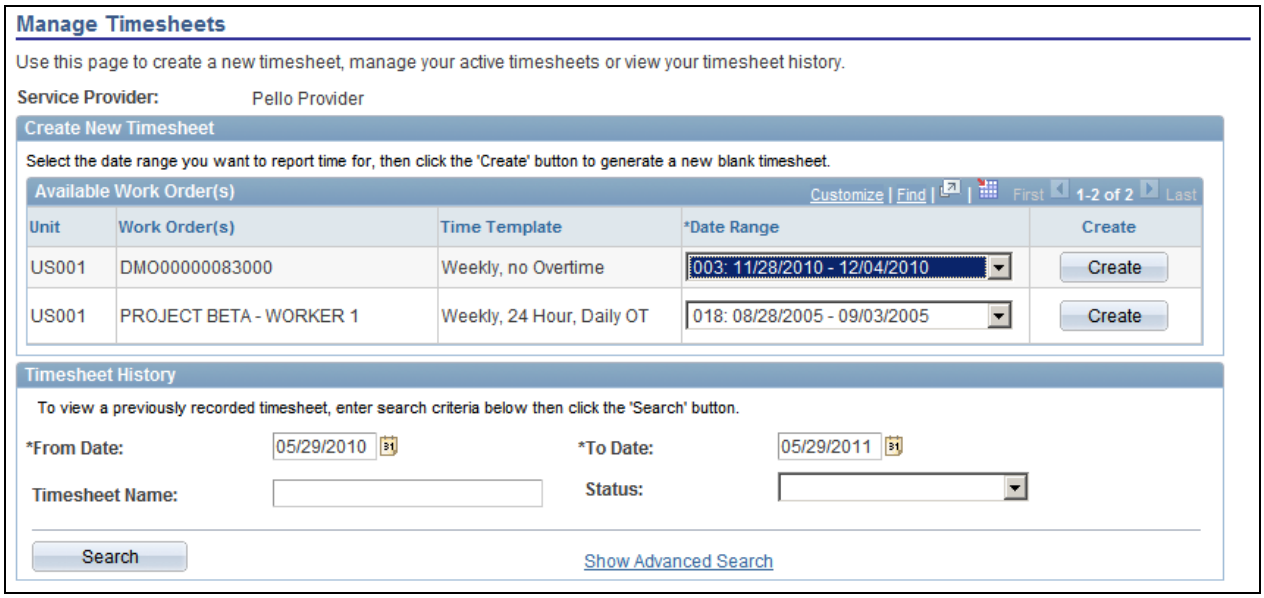
Status in External System	***Status in Services Procurement***
Raw	Accept in both Add and Update status.
Processed	Accept and submit the timesheet unless status is Final.
Submitted	Accept in both Add and Update status. If status is Update, create an adjustment in Services Procurement.
Approved	If the timesheet is passed to Services Procurement already having a status of Approved in the external system, it will not go through the approval process again within Services Procurement. The timesheet will be automatically approved and will be available for invoicing.
Rejected	Reject the timesheet, but accept resubmitted timesheets. For resubmitted timesheets in Update status, create an adjustment row in Services Procurement. Rejected is also a valid status for resubmitted timesheets.

If you are a provider who has had a timecard generated based on XML that you sent to an enterprise for whom you provide services and the timecard has been submitted, to view the timecard:

1. Sign in to the PeopleSoft system.

2. Select Services Procurement, Maintain Timesheets.

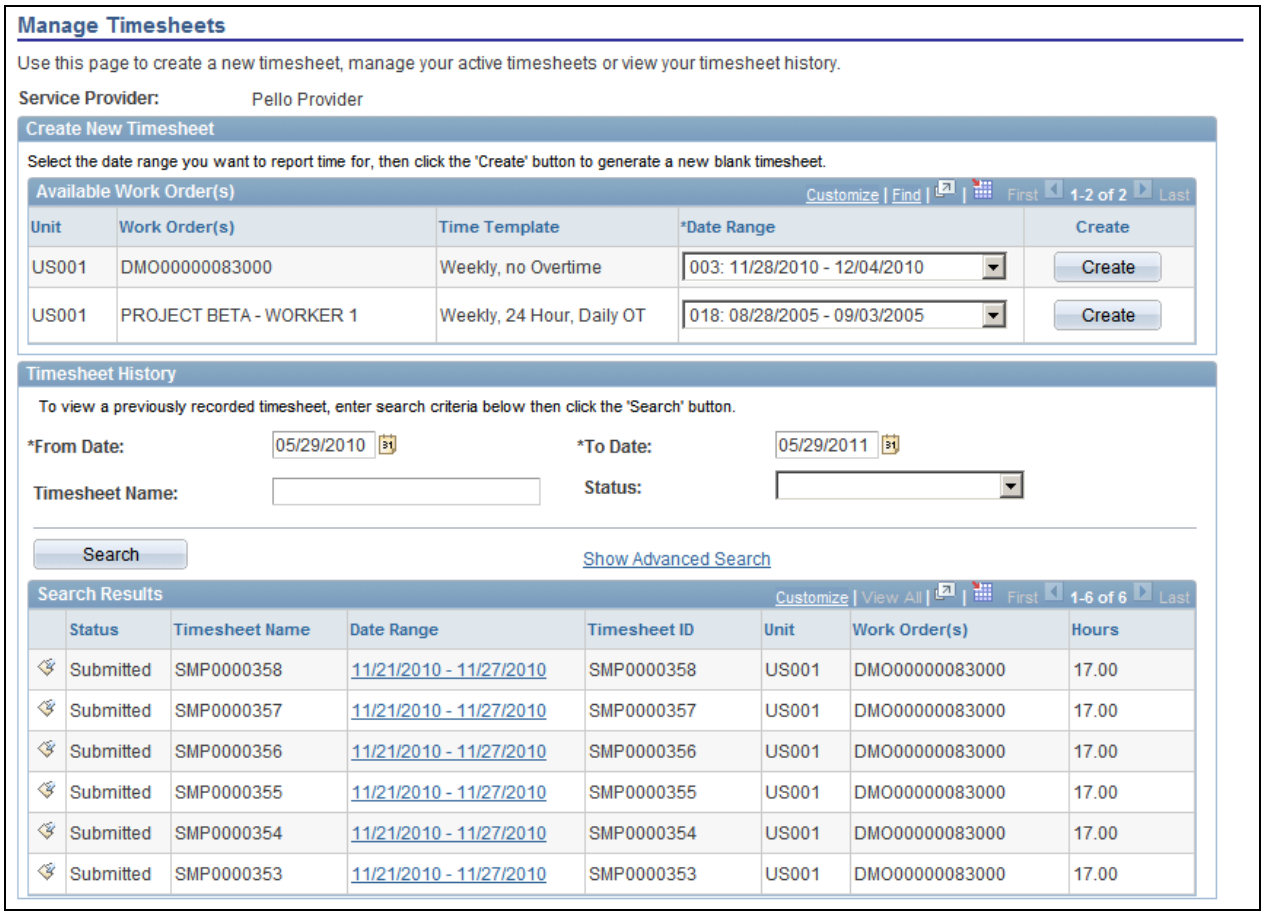
   The Manage Timesheets page appears.



Manage Timesheets page

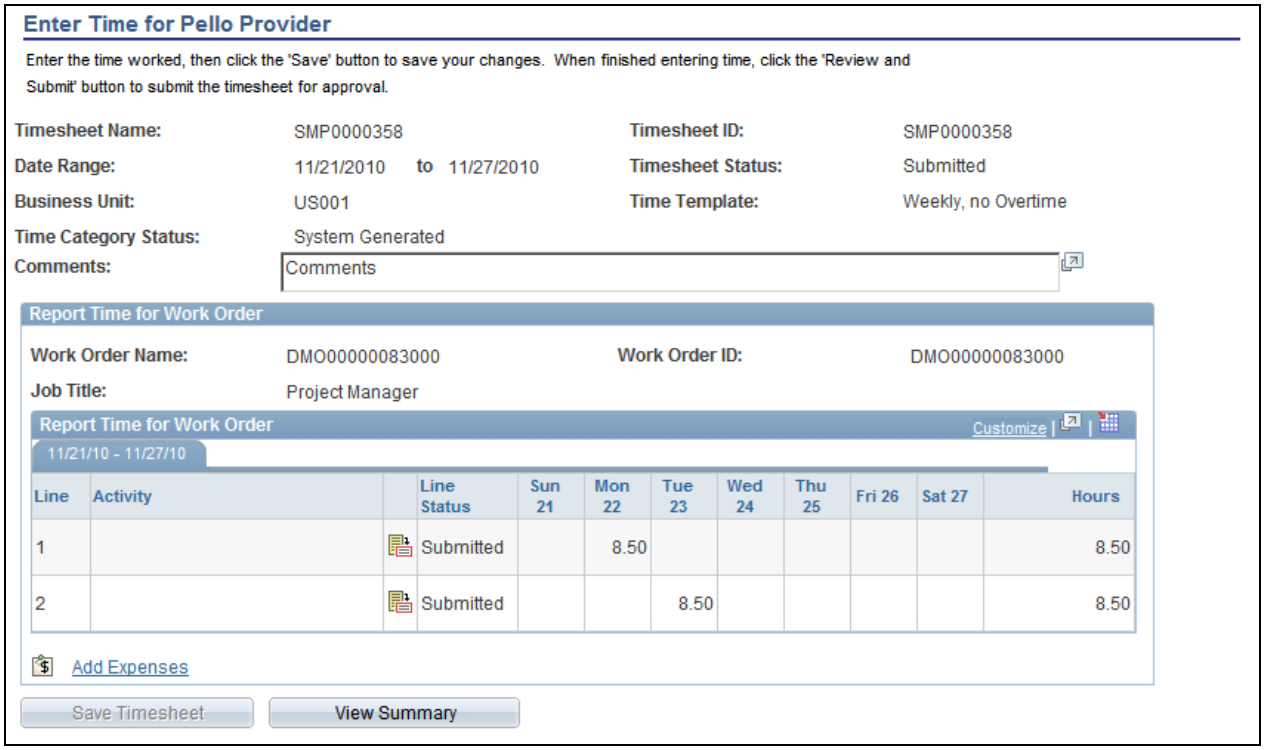
3. Click the Search button in the Timesheet History group box.

   The system displays a list of timesheets.



Manage Timesheets page with timesheets listed

4. To view details of a timesheet, click the link for the date range of the timesheet that you want to view.



Enter Time for Provider page

Chapter 20

Managing Expenses in PeopleSoft Services Procurement

This chapter provides an overview of expenses in PeopleSoft Services Procurement and discusses how to:

- Create and maintain expense reports.
- Submit and approve expense reports.
- Manage expense report worklists.

Understanding Expenses

The Expense feature enables you to capture travel and expense information relating to a project. A service provider can enter expenses incurred on a project and submit them to the project manager on an expense report for immediate approval.

Note. Expenses can be entered only if an expense amount is specified on the work order.

When an expense transaction is reported against an individual child service of a multi-resource parent work order, the system uses the tolerance percentage from the parent multi-resource work order and makes consumption updates to both the multi-resource parent work order and to the individual service child work order.

See Also

"PeopleSoft Services Procurement Preface," Common Elements Used In This PeopleBook, page xxv

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Multi-Resource Services, page 203

Creating and Maintaining Expense Reports

This section discusses how to:

- Manage expenses.
- Enter general expense report information.

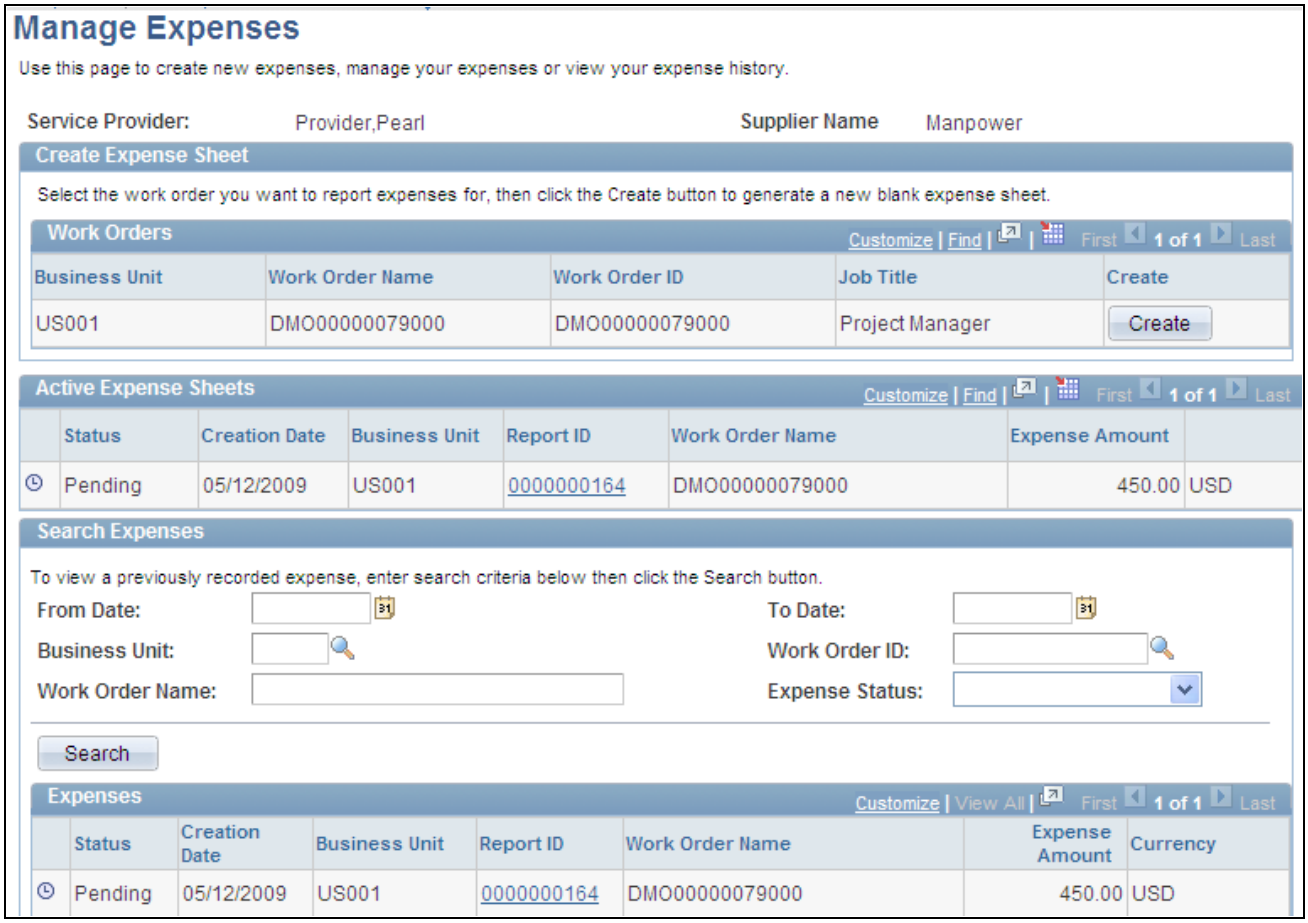
- Add expense lines.
- Enter expense line information.
- Maintain services expense report details.

Pages Used to Create Expense Reports

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Expenses	SPA_EXP_ROSTER	Services Procurement, Manage Expenses	Manage expenses to include creating new expenses, managing the expenses, and viewing the expense history.
General Information	SPA_SHEET_MAIN2	Click the Create button on the Manage Expenses page.	Enter general expense report information including the description, business purpose, and other comments.
Services Expense Report Details	SPA_SHEET_LINES2	Click Continue on the General Information page.	Add expense lines.
Add Expense	SPA_SHEET_EXPENSE2	Click the Add button on the Services Expense Report Details page.	Enter expense line information.
Exchange Rate Detail	EXCH_RT_DTL	Click the Rate Detail link on the Add Expense page.	View exchange rate information.
Expense Attachments	SPA_EXP_ATTACH	Click the Add Attachment link on the Services Expense Report Details page.	Add attachments to expense reports. Reviewers and approvers can open and view the attachments during the approval process.
Expense Report Line Adjustment	SPA_SHT_LN_ADJ	Click the Add Expense button on the Time Report Detail Adjustment page.	View adjusted expense lines.
Expense Report Line Entry Adjustment	SPA_SHT_EXP_ADJ	Click the Expense Type link on the Expense Report Line Adjustment page.	View adjusted expense line detail information.
Services Expense Report Details	SPA_SHEET_LINES2	Click a Report ID link on the Manage Expenses page.	Maintain services expense report details.
Manage Expenses (as proxy)	SPA_EXP_SUP_ROST	Services Procurement, Manage Expenses as Proxy	Manage expenses on behalf of another user.

Managing Expenses

Access the Manage Expenses page (Services Procurement, Manage Expenses).



Manage Expenses page

You use this page to manage expenses against work orders. This includes reviewing information about a work order and creating new expense reports for it. You can also limit the search results for existing expense reports that appear on the page and review active reports and their statuses.

Note. To add expense reports, you must be defined as the service provider or service provider contact for a work order. The available work orders appear on this page when you access it.

Create Expense Sheets

Use this section to add expenses to an existing work order. When work orders are associated with a multi-resource order, this page includes the lower-level individual child service resource-based work orders and displays the Job Title field so that you can select the work order to which you want to associate the expenses.

Click the Create button to access the General Information page where you can add a new expense report.

See Chapter 20, "Managing Expenses in PeopleSoft Services Procurement," Creating and Maintaining Expense Reports, page 531.

Search Expenses

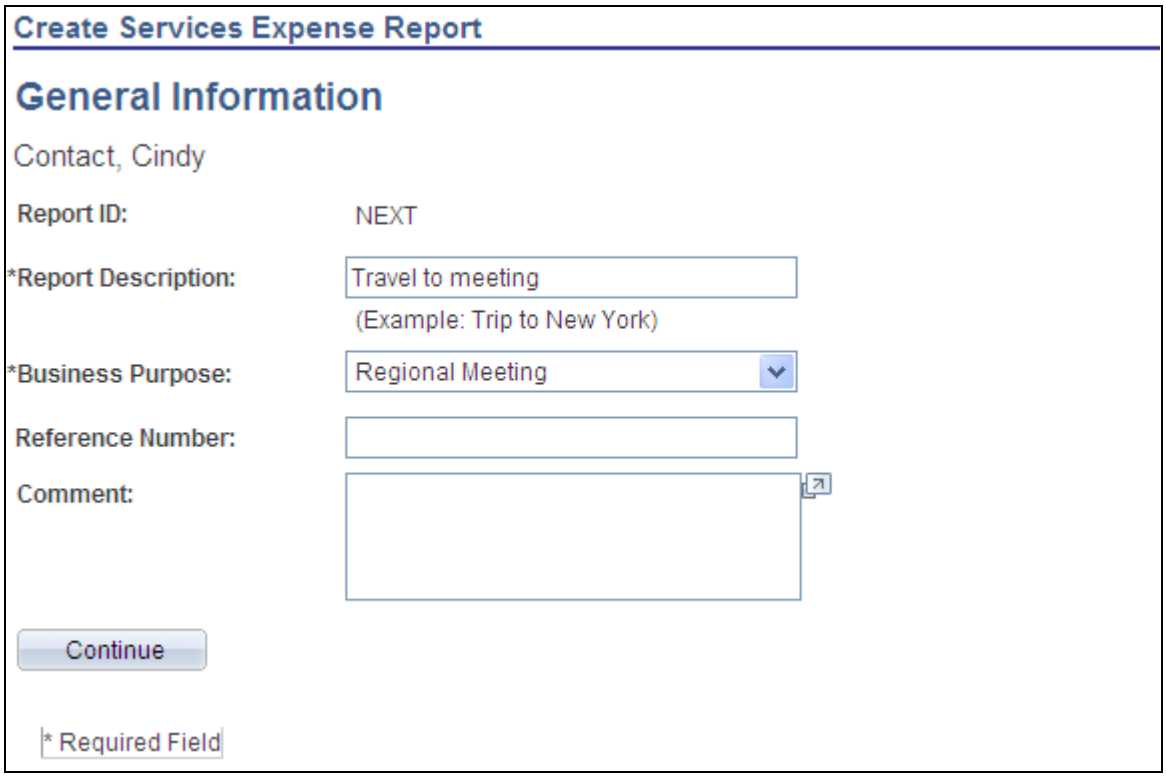
The system displays all expenses if search criteria has not been specified. To limit the displayed results, enter search criteria and click Search.The search results appear in the Expenses grid.

Expenses

Report ID Click the link to access the Service Expense Report Details page, where you can view the details of previously created expense reports.

Entering General Expense Information

Access the General Information page (Services Procurement, Manage Expenses; click the Create button on the Manage Expenses page).



General Information page

Report Description Enter a description of this report (30-character limit).

Business Purpose Select the business purpose of this trip or activity.

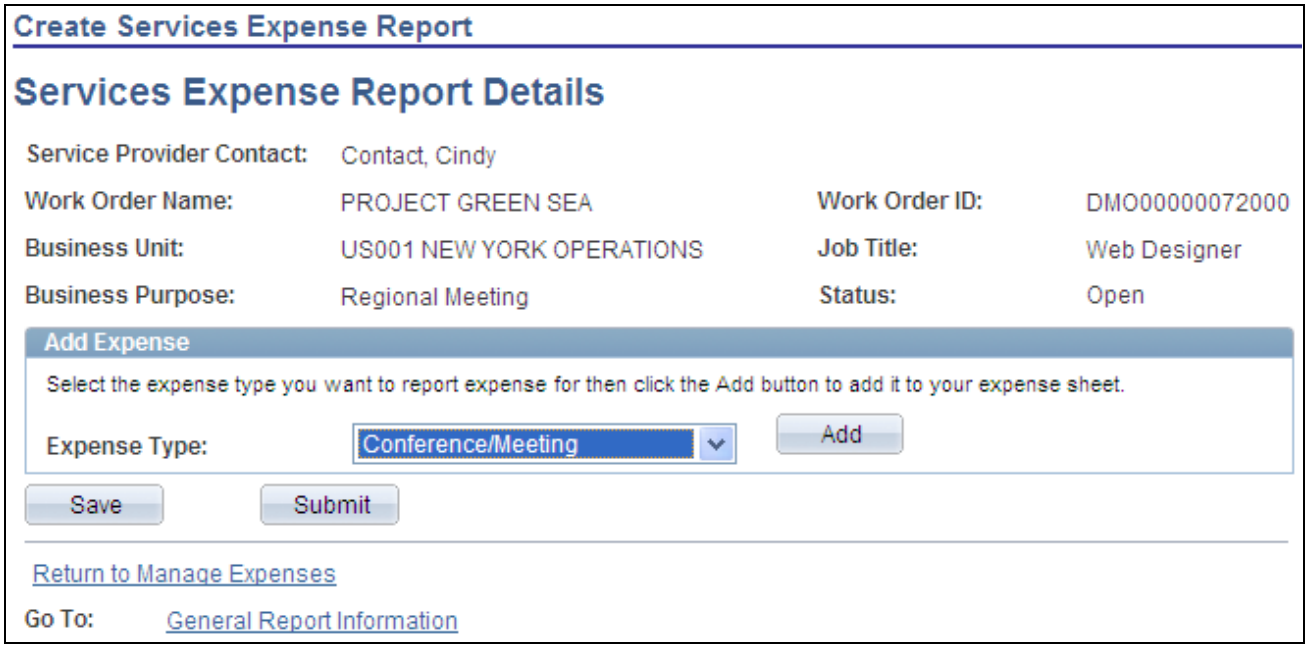
Reference Enter text (10-character limit.)

Comment Enter general comments regarding the expense sheet.

Continue Click to access the Services Expense Report Details page and add expense lines.

Adding Expense Lines

Access the Services Expense Report Details page (click Continue on the General Information page).

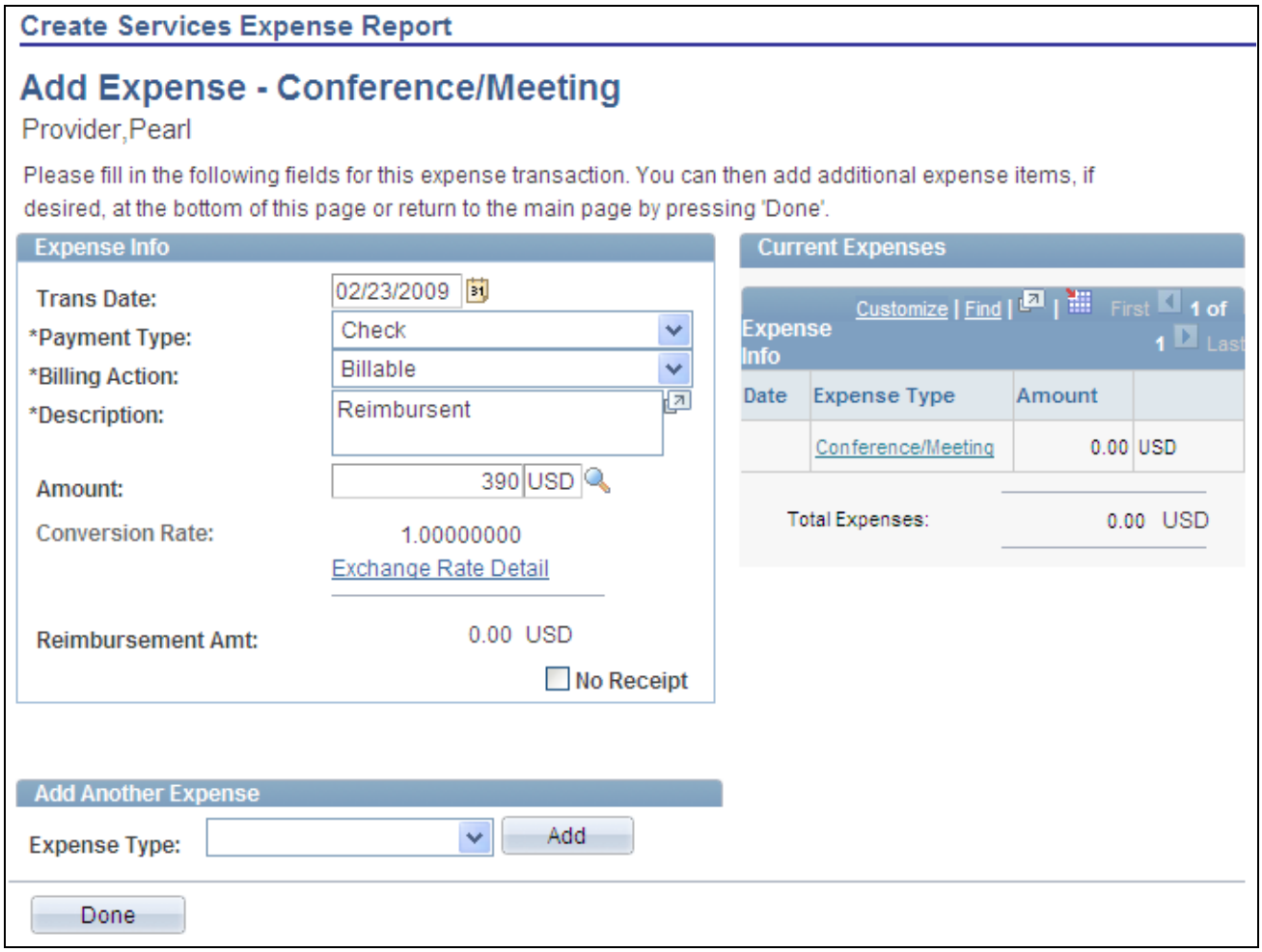


Services Expense Report Details page

Select an expense type and click Add to access the Add Expense page.

Entering Expense Line Information

Access the Add Expense page (click the Add button on the Services Expense Report Details page).



Add Expense page

Depending on how the organization defines the expense type, you access the Add Expense page to enter more details such as merchant, mileage, or number of nights pertaining to the line item. When you complete the necessary information, the expense appears as a line item on the Services Expense Report Details page.

Generic Fields Included on Several Add Expense Pages

Trans Date (transaction date)	Enter the transaction date for this expense.
Payment Type	Select the payment type for this expense.
Billing Code	Select *Billable* or *Nonbillable.*
Merchant: Preferred or Non-preferred	Depending on how the expense type is defined during setup, this field may be required.
Location	Enter where the transaction occurs.
Description	Depending on how expense type is defined during setup, this field may be required.

Amount	Enter the expense amount and the currency in which it was purchased. The currency code is available for edit only if the PeopleSoft Purchasing business unit allows multicurrency purchase orders.
Conversion Rate	Appears automatically and cannot be modified.
Reimbursement Amount	Appears in vendor location currency. The vendor location currency appears by default in the Work Order Vendor Location field. You can change this value by choosing a different currency in the Amount field if the PeopleSoft Purchasing business unit allows multicurrency purchase orders.
Rate Detail	Click to view rate calculation information.
No Receipt	Select this check box if no receipt exists to substantiate an expense item that normally requires a receipt. If a receipt is required, you may need to provide an explanation for this expense.
Done	Click when you have completed the line item details. This returns you to the Services Expense Report Details page.

Specific Fields Included on Some Add Expense Pages

Ticket Number	Enter a reference number for the airline ticket.
Miles	Enter the number of miles used to calculate automobile mileage reimbursement.
Add Additional Attendees	For meals, click to add a guest or business associate name, company, and title.
Number of Nights	Enter the number of nights included in the hotel stay.
Start Timeand **End Time**	Enter the start and end of the business day.
Retrieve Per Diem Amounts	Click for the system to populate the Amount field with the allowed per diem reimbursement.
Per Diem Information	Click to navigate to the Per Diem Information page to select meals that were provided by another party such as a lodging establishment. Depending on how the system is set up, the appropriate amount may be deducted from the per diem for that day.

Maintaining Services Expense Report Details

Access the Service Expense Report Details page (click the Report ID link on the Manage Expenses page).

Service Expense Report Details page (1 of 2)

Service Expense Report Details page (2 of 2)

After you create an expense report, you can use this page to view and update the report. You can also create new expenses for the work order using the Add Expense grid. Select a type of expense and click the Add button.

Save Click to save updates to an expense report.

Submit	Click to submit the expense to the expense approver. See Chapter 20, "Managing Expenses in PeopleSoft Services Procurement," Submitting and Approving Expenses, page 539.
Add Attachment	Click to upload an attachment to the expense report.
Preview Expense Approver(s)	Click to view approvers and reviewers for the expense report. This link is available when the business unit is set to use approval workflow for expenses. See Chapter 20, "Managing Expenses in PeopleSoft Services Procurement," Submitting and Approving Expenses, page 539.
General Report Information	Click to access the General Information page where you can view the basic information about the expense.

Expense List

This grid box displays the current expenses for a service provider. Click the Expense Type link to update an expense. The total amount of the expenses appears in the Total Expenses field.

Expense Report History

This grid box displays the history of expense reports for a service provider along with the status of the expense report. Click the Expense Type link to update an expense. The total amount of the expenses appears in the Total Expenses field.

Submitting and Approving Expenses

This section discusses how to:

- Submit expense reports for approval.
- Approve, deny, or hold expense reports.
- Approve multiple expense reports.
- Adjust expense reports.

Pages Used to Submit and Approve Expenses

Page Name	*Definition Name*	*Navigation*	*Usage*
Services Expense Approval Status	SPA_EX_APPR_STATUS	Click the Preview Expense Approver(s) link on the Services Expense Report Details page.	View and update approvers and reviewers for expense approvals. This page is available when expenses are enabled for workflow on the business unit.
Submit Expense Sheet	SPA_SUBMIT_CONFIRM	Click the Submit button on the Services Expense Report Details page.	Confirm the submission of the expense approval. Click OK to submit the expense or Cancel to return to the Services Expense Report Details page.
Services Expense Report Details	SPA_SHEET_LINES2	(Worklist, Worklist, Filter By *Approval Routing*, select an expense report that requires your approval and click the Adjust Expense Sheet button on the Service Expense Report Details page).	Adjust expense sheets.
Monitor Approvals	EOAW_ADM_MO_SRC	Enterprise Components Approvals, Approvals, User Approvals	Monitor approvals using the User Monitor.

Submitting Expense Reports for Approval

Access the Service Expense Report Details page (click the Report ID link on the Manage Expenses page).

Service providers can complete and submit expenses for approval upon completing the expense report or save it and return later using the Manage Expenses page to access the report. You can use the Service Expense Report Details page to view information about the work order against which the expense is applied, add additional expenses, and review existing expenses and expense history.

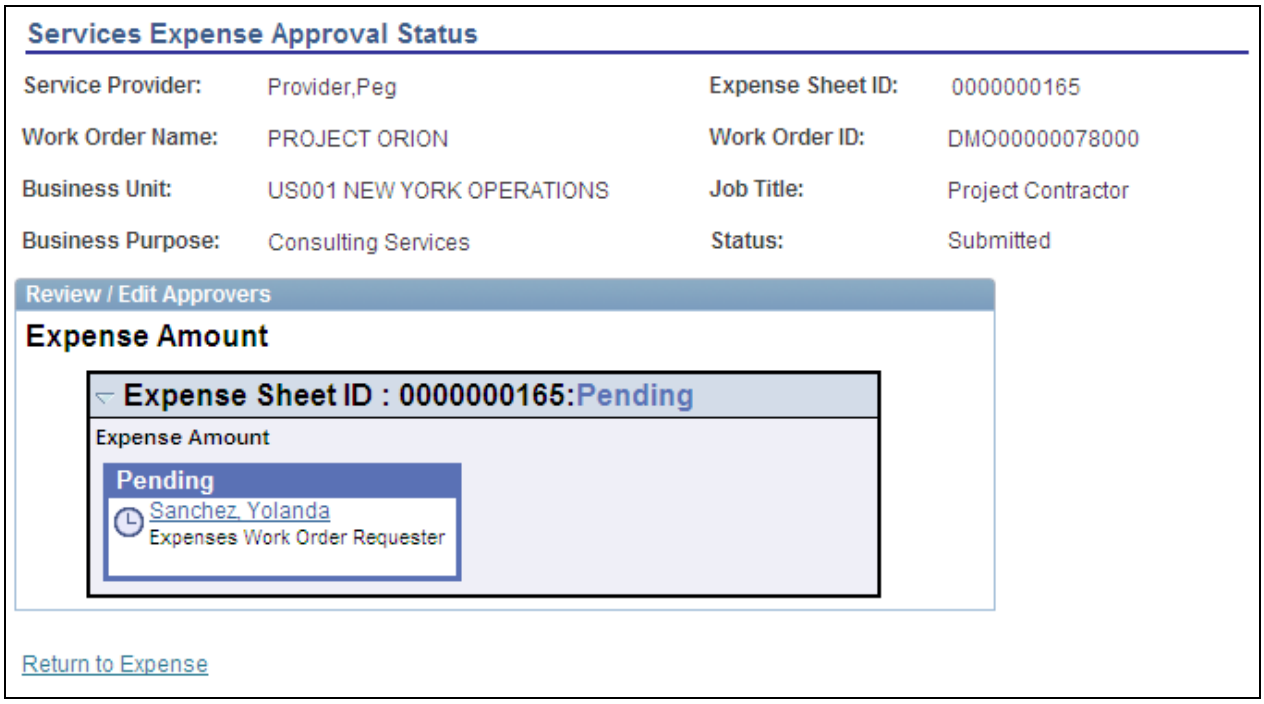
Note. If you are submitting time against a child for a multi-resource work order, the header information also displays the parent work order ID and name.

Before you submit an expense report, you can add another expense type. Select an expense type in the Expense Type field and click the Add button. You can also update expense lines and add new lines to an expense report by clicking the Expense Type link in the Expenses grid box.

After creating a new expense report or reviewing expenses, you can view expense approvers and reviewers and submit the expense for approval. To preview and update expense approvers:

1. Click the Preview Expense Approver(s) link.

   This link is available if expenses have been enabled for workflow approval for the business unit. The system displays the Services Expense Approval Status page. This page provides a graphical map of the workflow. The next example illustrates how the page appears:



   Services Expense Approval Status page

   The graphical map for the workflow displays expense approvers and reviewers and the status of their reviews. You can insert additional approvers or reviewers or create a new approval path for an expense. If you insert an ad hoc approver or reviewer, you can also remove the approver or reviewer.

   The title for the workflow represents the type of expense that is being processed. This is the expense thread description and consists of unique information for the expense. The graphic includes the expense status and overall status of the expense approval and provides information about individual approvers and the status of their approvals. The individual graphics vary in color depending on the approval status.

2. Click the Return to Expense link to return to the Manage Expenses page where you can submit the approval.

To submit an expense report:

1. Click the Submit button.

   The system displays the Submit Expense Sheet Confirmation page where you can confirm that you want to continue with the submission.

2. Click OK to submit the expense.

   The system displays the Save Confirmation page with the new expense approval status and an updated graphic for the workflow. You can also click Cancel to return to the Services Expense Report Details without submitting the expense.

3. Click OK to continue.

See Also

Chapter 8, "Setting Up PeopleSoft Services Procurement Workflow," Setting Up Expense Workflow, page 237

Approving, Denying, or Holding Expense Reports

Access the Services Expense Report Details page (Worklist, Worklist, Filter By *Approval Routing* and select an expense report that requires your approval).

Expense report approvers use this page to review, approve, deny, or hold expense reports. You can select one or more lines to approve. A status appears for each line.

When approving, denying, or holding expense reports, you can also add comments.

Note. At least one line must be selected to perform an approval task.

To approve or deny expense reports:

1. Click the Approve button.

   The system changes the status to *Approved.* The expense report is now available for invoicing.

2. Click the Deny

   Changes the status to *Denied by Approver.* If you deny the expense report, enter a comment to indicate a reason. The expense report returns to the service provider or service provider contact for modifications and resubmission.

3. Click the Hold button.

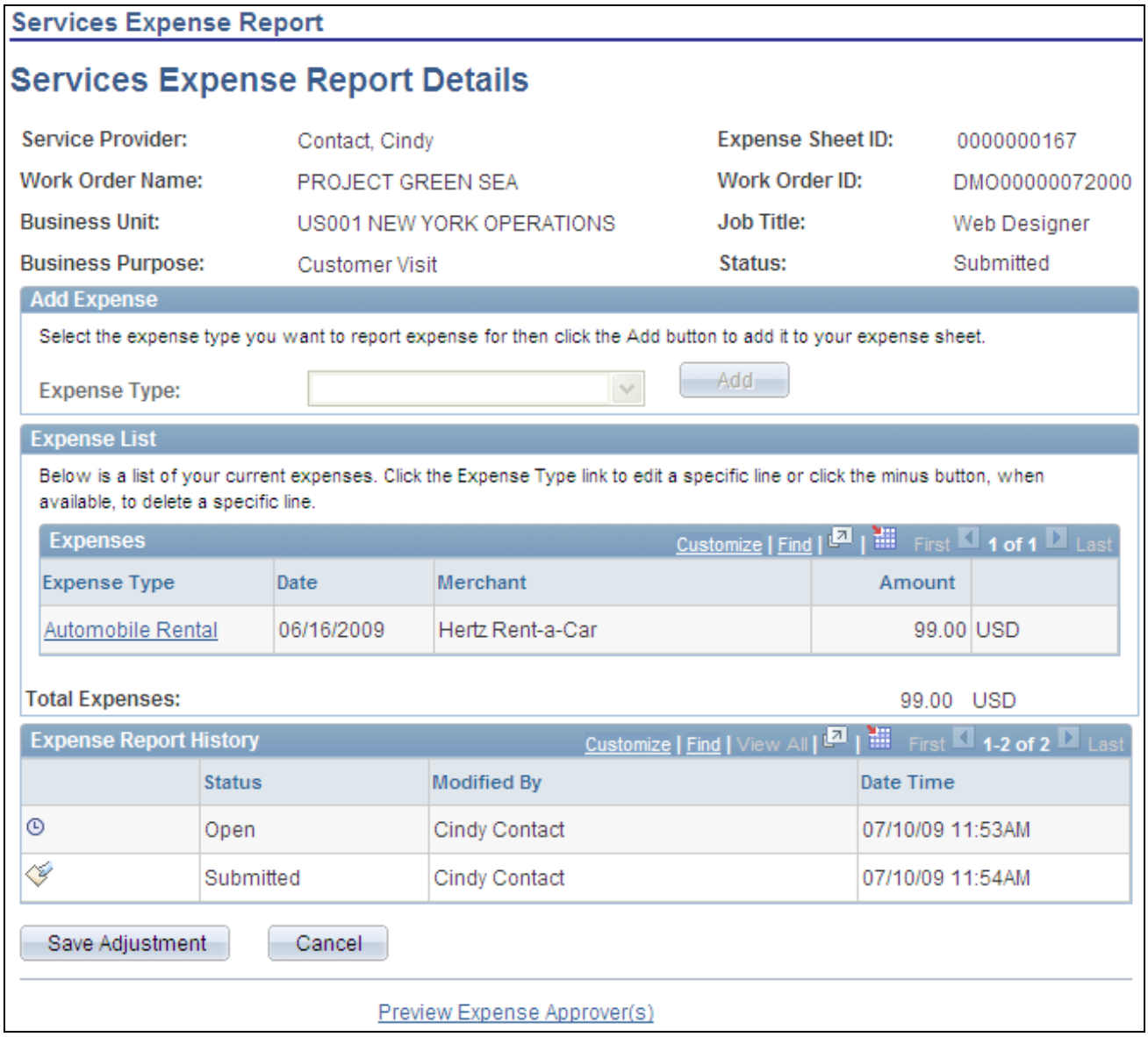
   This places the expense report approval on hold and gives the approver time to research an issue and prevents the approval process from going to the next approval step until the previous approver takes action on the expense report. The approval hold is removed when either the approver chooses to approve the expense report or when the report is updated in such a way that the approval process is restarted. When the approval is placed on hold, the system provides a worklist entry for the previous expense report approver. A comment is required when you place an expense report on hold.

   When you click the Hold button, the system displays a confirmation page. When you click the OK button on that page, the system provides a worklist entry for the person who submitted the expense report or for the previous approver. Using the worklist, the person can address comments from approver.

When all lines are approved, the expense report status changes to *Approved.*

Adjusting Expense Sheets

Access the Service Expense Report Details page (Worklist, Worklist, Filter By *Approval Routing*, select an expense report that requires your approval and click the Adjust Expense Sheet button on the Service Expense Report Details page).



Service Expense Report Details page

To adjust an expense sheet approvers:

1. Click the Expense Type link in the Expenses grid.

   The system displays the Services Expense Report Details page where you can make changes to the expense.

2. Click the Done button.

   The system returns to the initial Service Expense Report Details page with your updates.

3. Click the Save Adjustment button.

   The system displays a confirmation page that the adjustment was saved.

Managing Expense Report Worklists

This section discusses how to trigger worklist and email notifications.

Triggering Worklist and Email Notifications

The following status changes can trigger a worklist entry or email notification:

- The service provider receives a notification if the expense status changes to *Approve* or *Deny*.
- The approver receives a notification when an expense report is submitted.

Whether users receive worklist or email notifications depends on the approval workflow definition for the transaction configuration. The email notification contains values from the Manage Expenses page and a URL that the recipient should use to access the expense report.

Chapter 21

Managing Progress Logs

This chapter provides an overview of progress logs and discusses how to:

- Create progress logs.
- Manage progress logs.
- Submitting, approving, and adjusting progress logs.

Understanding Progress Logs

The progress log is similar to the timesheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverable work orders to the project manager for immediate, online approval. You can also track and report issues using the progress log. The project manager or progress log approver can provide feedback to the service provider, including performance-rating information through the approval process.

Use the Manage Progress Logs page as the focal point for all deliverables-based activity in PeopleSoft Services Procurement. Use this page to:

- Create, edit, view, or approve progress logs.
- Filter reports by selecting the criteria in the service provider contact, vendor, or status fields.
- Access pages used to modify progress log details.

See Also

"PeopleSoft Services Procurement Preface," Common Elements Used In This PeopleBook, page xxv

Prerequisites

These attributes must be set up before entering progress log information:

- Services time/progress templates.
- Activities defined as milestone activities.
- Activities defined for rate-based services.

A deliverable - based work order must also be released before progress log transactions can be entered against it.

See Also

Chapter 18, "Managing Work Orders," page 413

Creating Progress Logs

This section discusses how to:

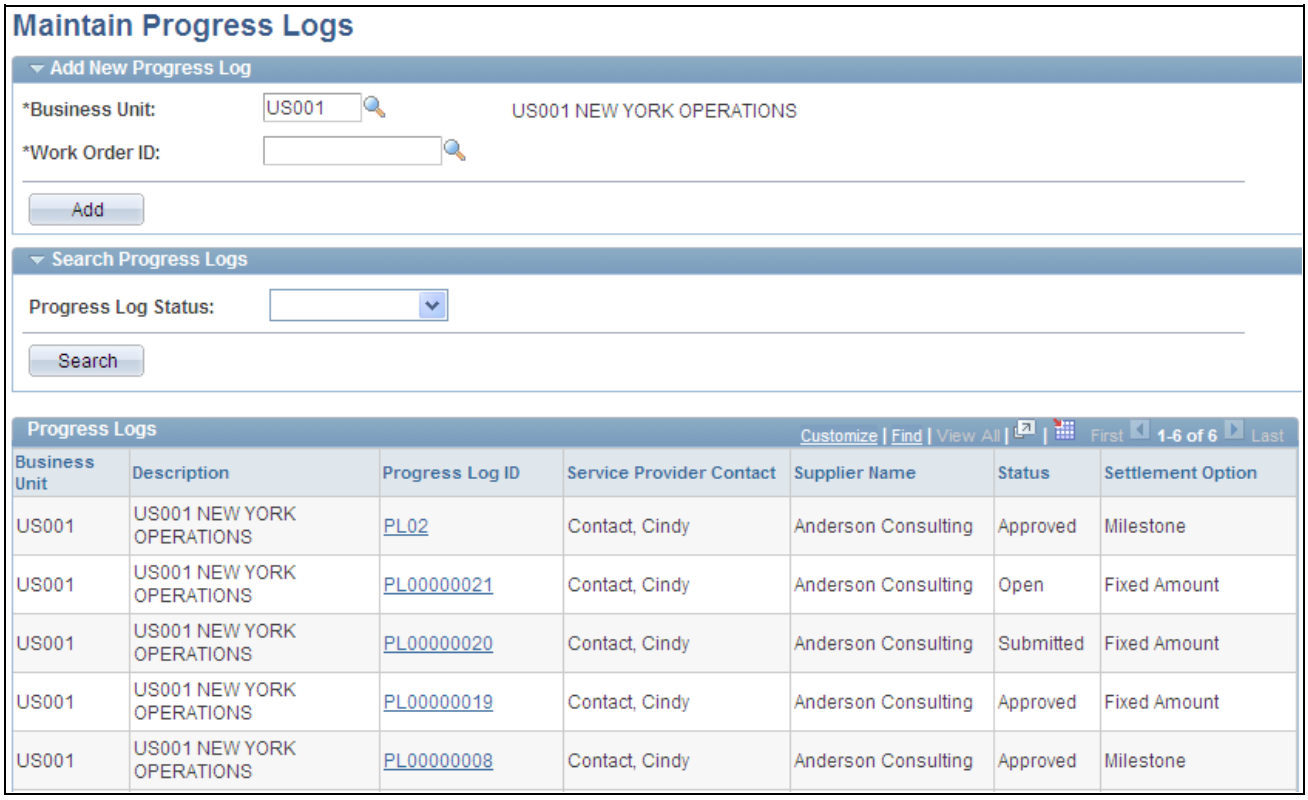
- View and maintain progress logs.
- Create a progress log.
- Enter or view progress log details.

Pages Used to Create Progress Logs

Page Name	***Definition Name***	***Navigation***	***Usage***
Maintain Progress Logs	SPA_MANAGE_PLOGS	• Services Procurement, Maintain Services Progress Logs (internal) • Services Procurement, Maintain Services Progress Log (external)	View and manage progress logs.
Progress Log Summary	SPA_PLOG_LINES	• Click the Progress Log ID link on the Maintain Progress Logs page. • Click the Add button from the Maintain Progress Logs page.	Create a progress log.
Progress Log Details	SPA_PLOG_DTL	Click the Details button on the Progress Log Summary page.	Enter or view progress log details.
Currency Information	EXCH_RT_DTL_INQ	Click the Exchange Rate Detail link on the Progress Log Details page.	View currency information.
Progress Logs by Work Order	SPA_PLOG_PRCNT_HST	Click the History button on the Progress Log Summary page.	View previously entered progress logs by work order.

Viewing and Maintaining Progress Logs

Access the Maintain Progress Logs page (Services Procurement, Maintain Services Progress Log).



Business Unit	Description	Progress Log ID	Service Provider Contact	Supplier Name	Status	Settlement Option
US001	US001 NEW YORK OPERATIONS	PL02	Contact, Cindy	Anderson Consulting	Approved	Milestone
US001	US001 NEW YORK OPERATIONS	PL00000021	Contact, Cindy	Anderson Consulting	Open	Fixed Amount
US001	US001 NEW YORK OPERATIONS	PL00000020	Contact, Cindy	Anderson Consulting	Submitted	Fixed Amount
US001	US001 NEW YORK OPERATIONS	PL00000019	Contact, Cindy	Anderson Consulting	Approved	Fixed Amount
US001	US001 NEW YORK OPERATIONS	PL00000008	Contact, Cindy	Anderson Consulting	Approved	Milestone

Maintain Progress Logs page

External and internal users use this page to begin tasks for progress logs. You can create and maintain progress logs and search for progress logs based on their status.

Add New Progress Log

Use this grid to create a new progress log.

Business Unit Select a business unit on which to search for work orders.

Work Order Select a work order for which to create a progress log. Only work orders that exists for the user are included in the list of values.

Add Click to create a progress log using the Progress Log Summary page.

See Chapter 21, "Managing Progress Logs," Creating a Progress Log, page 548.

Search Progress Logs

Select a status in the Progress Log Status field on which to search for existing progress logs. Statuses include, for example, Adjusted, Line Denied, and Pending. Click the Search button. The search results appear at the bottom of the page.

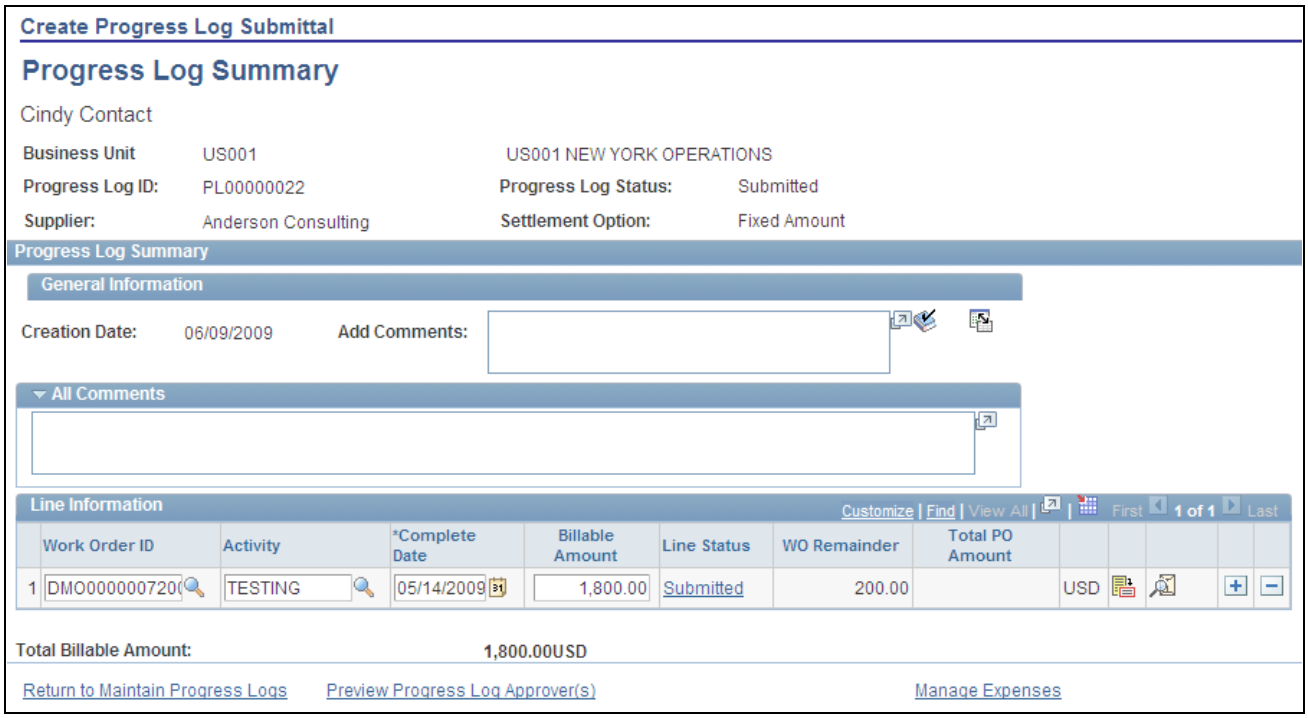
Progress Logs

This grid box displays the user's progress logs and includes information about

Progress Log ID	Click to access the Progress Log Summary page. See Chapter 21, "Managing Progress Logs," Creating a Progress Log, page 548.
Settlement Option	Displays the settlement method on which payments are based. Values include: *Fixed Amount* *Milestone* *Percentage* *Rate Based*

Creating a Progress Log

Access the Progress Log Summary page (Services Procurement, Maintain Services Progress Logs, and click the Progress Log ID link on the Maintain Progress Logs page).



Progress Log Summary page

The fields appearing on this page depend on the settlement option that you defined on the work order.

Add Comments	Enter comments or concerns for the progress log.
Work Order ID	Select the work order for which progress is being reported.
Billable Amount and **Total PO Amount** (total purchase order amount)	The system displays values associated with the work order. The system displays this value in the work order currency, as well as the base unit currency.
	Click the Details button to access the Progress Log Details page.
	Click the History button to access the Progress Logs by Work Order page.
Total Billable Amount	Displays the sum of the billable amounts.
Save	Click to save the progress log entry for later submission.
Submit for Approval	Click to submit the progress log for approval. The information is automatically submitted to the approver based on the approval workflow process definition, and you can return to the Maintain Progress Logs page.
Preview Progress Log Approver(s)	Click to access the Progress Log Approvals pages. This link is available when you select to include progress logs in workflow approval for the business unit.

Manage Expenses Click to access the Manage Expenses page where you can maintain details for this work order's expense report.

Milestone Settlement Method

These fields appear if you are using a service template with *Milestone* specified for the settlement option. The template is defined on the work order.

Milestone Activity and **Complete Date** Select a milestone from the available options, which are determined by the work order defined as using the milestone settlement option.

Note. Once a milestone activity is submitted, you cannot use it again for another progress log entry.

Complete Date Enter the date the milestone activity was completed.

% of WO (percentage of work order complete) The system displays this information based on the percentage assignments from the work order.

Fixed Amount Settlement Method

These fields appear if you are using a service template with *Fixed Amount* defined for the settlement option. The fixed amount settlement option is similar to the milestone settlement option in that both record progress against milestone activities. The difference is that fixed amount enables the suppliers to enter the amount they are paid for the activity rather than having the amount defined on the work order. The settlement option is defined on the work order.

Activity Select a milestone activity that is linked to the project defined on the work order.

Note. Progress for fixed amount work orders is reported against milestone activities, however unlike the Milestone Settlement Option, progress can be recorded multiple times against the same milestone activity with the Fixed Amount Settlement Option field.

Complete Date Enter the date that the progress was completed.

Billable Amount Enter the billable amount for the deliverable.

Percentage Settlement Method

These fields appear if you are using a service template with *Percentage* specified for the settlement option as defined on the work order.

% Complete (percentage complete) Enter the percentage value completed.

% Complete TD (percentage complete to date)	Displays this information based on data submitted to date. The system updates the work order with this information when you save the progress log.

Note. To submit this transaction, the submitted total, when added to previously submitted progress logs, cannot exceed the total purchase order amount on the work order, plus the tolerance percentage defined on the work order.

Rate Based Settlement Method

These fields appear if you are using a service template with *Rate Based* defined for the settlement option. The settlement option is defined on the work order.

Activity	Select the activity that you performed. After you select the activity, the rate, unit of measure and billable amount for the activity appear on the page. These fields come from the work order activity definition.
Quantity	Enter the quantity completed.

Entering or Viewing Progress Log Details

Access the Progress Log Details page (click the Details button on the Progress Log Summary page).

Progress Log Details page

This page displays the progress log ID, line number, work order ID and activity. It also provides the billable and base billable amounts. You can also approve, deny, or place a hold on a work order line progress log.

Exchange Rate Detail	Click to access the Currency Information page that displays currency exchange details
Approve	Click to approve the progress log. The system provides a confirmation page for you to continue with or cancel the approval.
Deny	Click to deny the approval of the progress log. The system provides a confirmation page for you to continue with or cancel the approval denial.
Hold	Click to hold the progress log from further processing. The system provides a confirmation page for you to continue with or cancel placing the progress log on hold.
Invoice Status, Invoice Date, and**Invoice Number**	Display after the progress log is included on an invoice.

Progress Log Detail History

This grid box displays the progress log history that includes the service provider and approval status.

Submitting, Approving, and Adjusting Progress Logs

This section provides an overview of progress logs and discusses how to:

- Preview progress log approval workflow.
- Submit progress logs for approval.
- Approve, deny, or hold progress logs.
- Respond to progress logs placed on hold.
- Adjust progress logs.
- Trigger worklist and email notifications.

Understanding Progress Logs

Progress logs that have been approved or adjusted can be exported to PeopleSoft Project Costing for cost collection. If progress logs that were previously exported to Project Costing are adjusted, the original values are reversed and the newly adjusted values are staged for processing.

See Also

Chapter 7, "Integrating with Other PeopleSoft and Third-Party Applications," Integrating with PeopleSoft Project Costing, page 219

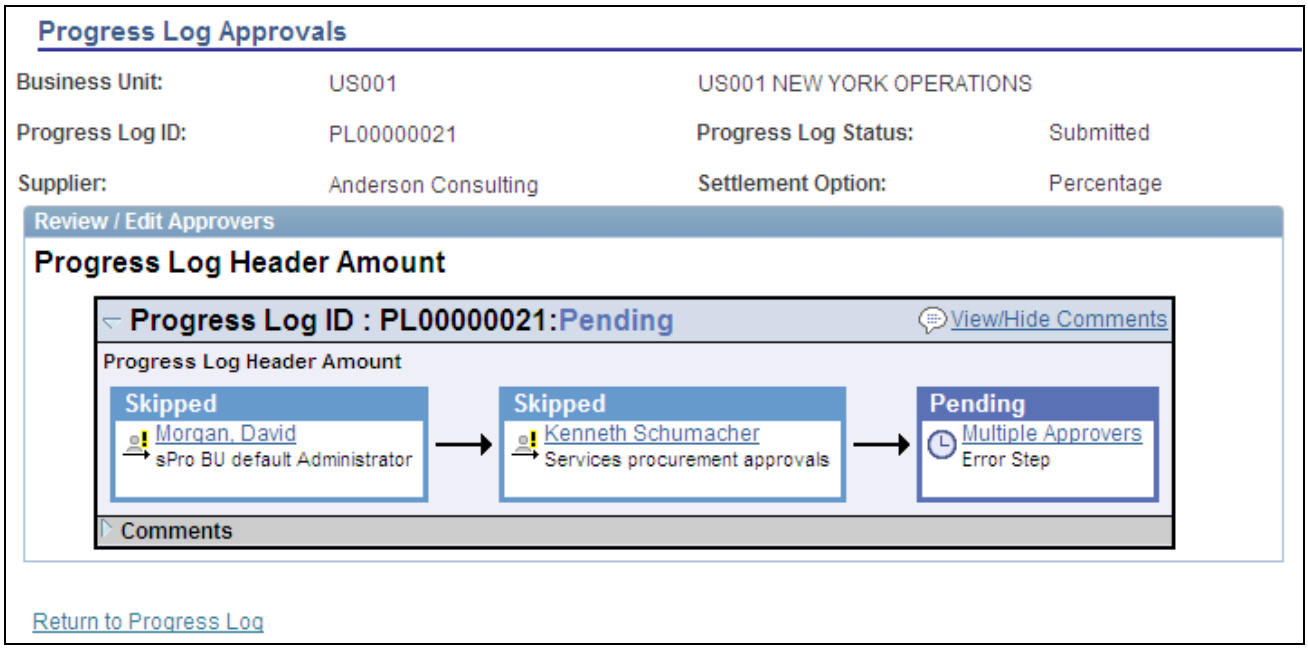
Pages Used to Submit, Approve, and Adjust Progress Logs

Page Name	*Definition Name*	*Navigation*	*Usage*
Progress Log Summary	SPA_PLOG_LINE	Services Procurement, Maintain Services Progress Log Click the progress log that you want to approve.	Submit and approve progress logs.
Progress Log Approvals	SPA_PL_APPR_STATUS	Click the Preview Progress Log Approver(s) link on the Progress Log Summary page	Preview progress log approval workflow.
Save Confirmation	SPA_PL_SAVE_CONF	Click the OK button on the Progress Log Approvals page.	Confirm the approval of a timesheet.

Page Name	*Definition Name*	*Navigation*	*Usage*
Enter Requested Information	SPA_PL_INFOADD	Access the Worklist and select the *Approval Request Information* workflow entry for the progress log placed on hold.	Respond to approvals placed on hold.

Previewing Progress Log Approval Workflow

Access the Progress Log Approvals page (click the Preview Progress Log Approver(s) link on the Progress Log Summary page).



Progress Log Approvals page

The Progress Log Approvals page provides a graphical map for the workflow by displaying the approvers and reviewers and the status of their reviews. You can insert additional approvers or reviewers or create a new approval path for a progress log. If you insert an ad hoc approver or reviewer, you can also remove the approver or reviewer. Approver and reviewers that initially appear in the workflow are defined using the approval process definition.

The title for the workflow represents the type of progress log that is being processed. This is the progress log thread description and consists of information that makes the log unique. The graphic includes the progress log ID and overall status of the approval. The graphics provide information about individual approvers and the status of their approvals and vary in color depending on the approval status.

See Also

Chapter 8, "Setting Up PeopleSoft Services Procurement Workflow," Setting Up Progress Log Workflow, page 237

Chapter 8, "Setting Up PeopleSoft Services Procurement Workflow," PeopleSoft Approval Framework Processing, page 228

Submitting Progress Logs for Approval

To submit progress logs for approval:

1. Access the Progress Logs Summary page (Services Procurement, Maintain Services Progress Log, and click the Progress Log ID link on the Maintain Progress Logs page).

   The system displays the Progress Log Summary page.

2. Click the Submit for Approval link.

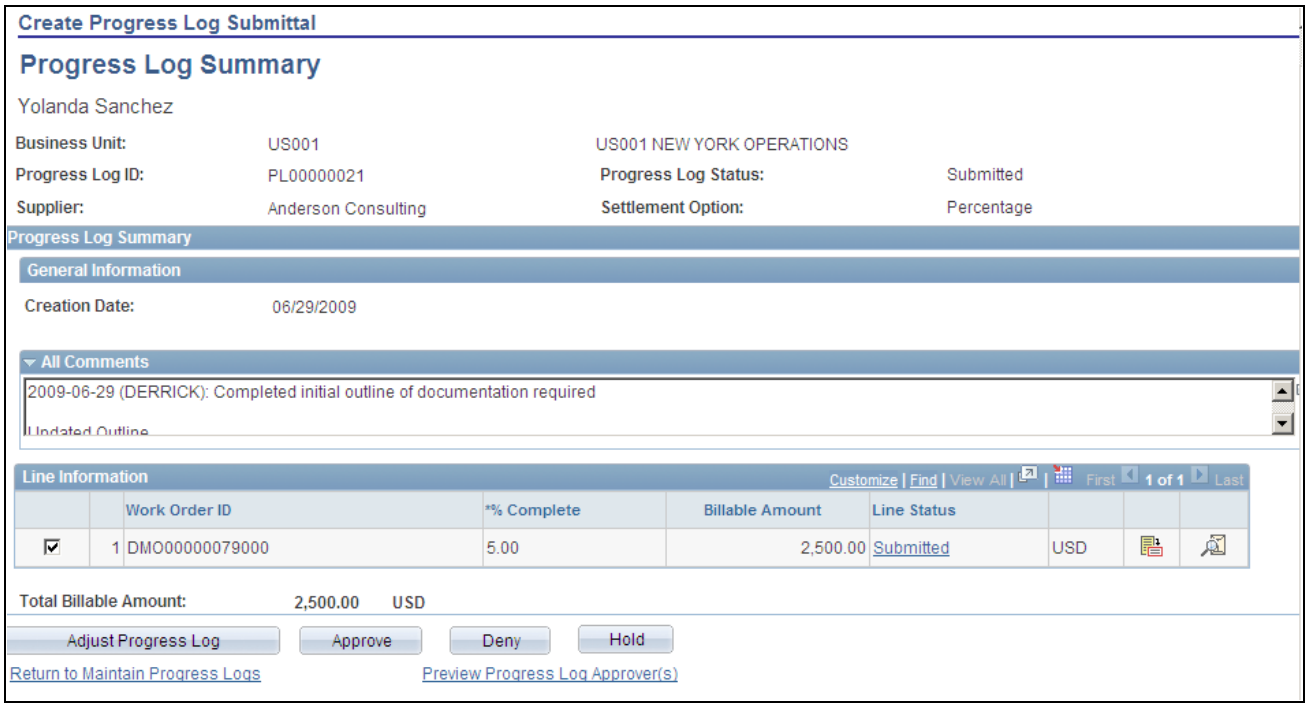
3. Click OK on the Submit Confirmation page.

   You can click Cancel to return to the Progress Log Summary page without submitting the log for approval.

   The system sends the progress log to the first approver in the approval workflow and updates the progress log status to Submitted.

Approving, Denying, or Holding Progress Logs

Access the Approve Progress Log Summary page (Worklist, select *Approval Routing* in the Worklist Filters field, and select a progress log that requires approval).



Progress Log Summary page

Progress log approvers use this page to review, adjust and approve, deny, or hold progress logs. You can select one or more lines to approve. A status appears for each line.

When approving, denying, or holding progress logs, you can also add comments and ratings.

Note. At least one line must be selected to perform an approval task.

To approve progress logs:

1. Click the Approve button.

   The Approve Progress Log Confirmation page appears.

2. Click OK.

   The system sends the progress log to the next approver in the approval workflow and updates the progress log status to Pending. If there are no more approvers in the workflow, the system updates the progress log status to Approved. When all lines are approved, the progress log status changes to *Approved.*

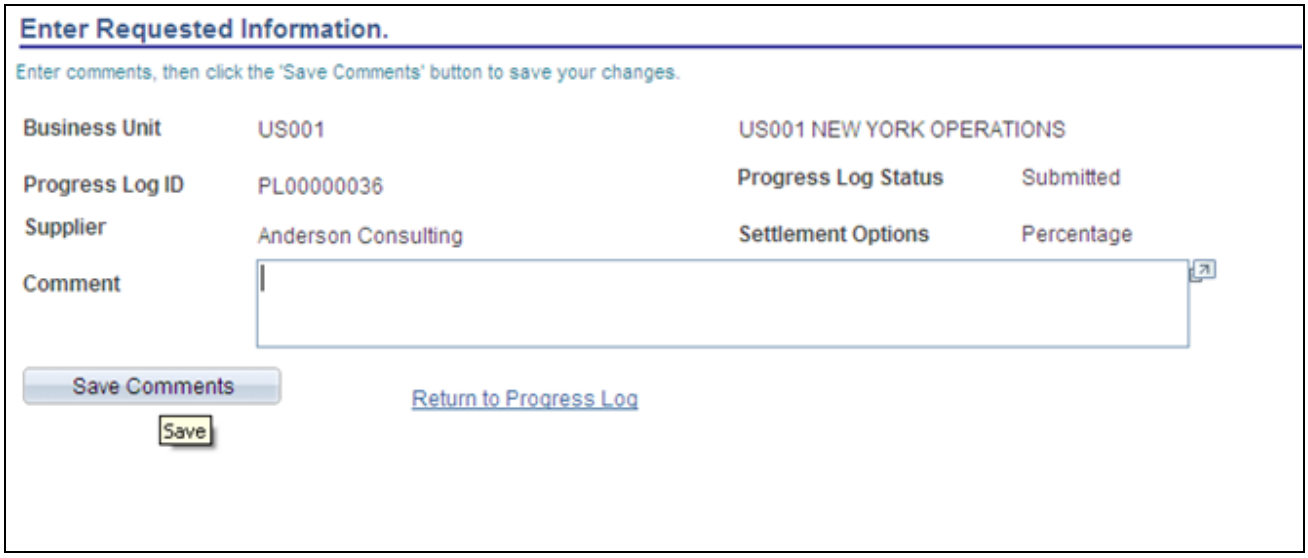
   Click Cancel to return to the Progress Log Summary page without approving the progress log.

To deny the approval of a progress log, click the Deny button. The system will require a reason code and comment for the denial if reason codes are required. The system changes the progress log status to *Denied by Approver.*

To place the approval on hold, click the Hold button. The hold action gives the approver time to research an issue and prevents the approval process from going to the next approval step until the previous approver takes action on the progress log. The approval hold is removed when either the approver chooses to approve the progress log or when the log is updated in such a way that the approval process is restarted. When the approval is placed on hold, the system provides a worklist entry for the previous progress log approver

Responding to Progress Logs Placed On Hold

Access the Enter Requested Information page (access the Worklist and select the *Approval Request Information* workflow entry for the progress log placed on hold).

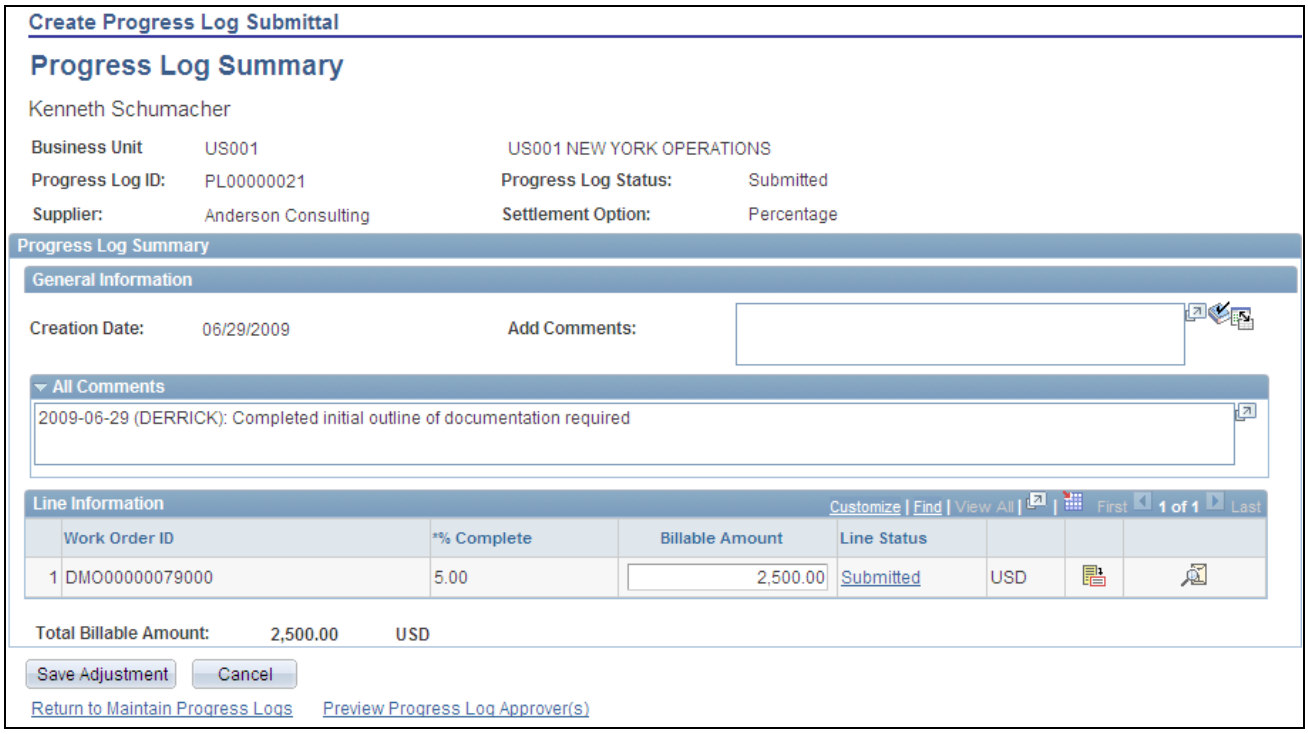


Enter Requested Information page

When a progress log approver places an approval on hold, you can provide additional information to the approver using this page. To provide the information, use the Comment field. The field is required. Click the Save Comments button to send the progress log approval back to the approver who placed a hold on the approval. The approver can then approve the progress log.

Adjusting Progress Logs

Access the Progress Log Summary page (Worklist, select *Approval Routing* in the Worklist Filters field, and select a progress log that requires approval).



Progress Log Summary page for adjustments

The progress log approver can adjust a submitted or approved progress log by selecting the Adjust Progress Log button on the Progress Log Summary page. The approver can adjust the amount and modify comments while performing adjustments. If a submitted progress log is adjusted, the status remains *Submitted.* If an approved progress log is adjusted, the status changes to *Adjusted.* If an invoiced progress log is adjusted, the invoice for that progress log is cancelled. If the progress log was adjusted, a link is available to view adjustments.

Triggering Worklist and Email Notifications

The following status changes can trigger a worklist entry or email notification:

- The service provider contact receives notification if status changes to *Approve*, *Denied*, or *On Hold.*
- The service provider contact receives notification if status changes to *Denied* or *On Hold.*
- The approver receives notification when a progress log is submitted.

Whether worklist or email notifications are sent depends on the approval workflow transaction configuration. The email notification contains values from the Progress Log Summary page and a URL for the recipient to access the progress log.

Chapter 22

Managing Settlements

This chapter provides an overview of settlements in PeopleSoft Services Procurement and discusses how to:

- Create invoices manually.
- Generate and print invoices automatically.
- Manage invoices.
- Approve invoices.
- Manage invoice approval for suppliers.

Understanding Settlements in PeopleSoft Services Procurement

Managing settlements with PeopleSoft Services Procurement enables individuals who have appropriate permissions to create consolidated proforma invoices. The proforma invoice process can be optionally configured to include or exclude suppliers in the invoice approval process, based on the supplier's setup. Specific time sheets, expenses, or progress logs lines can be added or removed prior to submitting the invoice for approval. After approval, the proforma invoice is viewed online and printed, included in a file for export, or both.

You can grant permissions for each of these functions:

- Automatic invoice generation.
- Manual invoice creation.
- Invoice management.
- Invoice approval.
- Supplier invoice approval.
- Invoice printing and processing.

With PeopleSoft Services Procurement Settlement, you can:

- Manage the invoicing and settlement process.
- Invoice at varying frequencies.
- Select approved time sheets, expenses, or progress logs for an invoice.
- Manage invoice submittal, approval, and processing.

Invoice Adjustments

The Settlement feature in Services Procurement provides a self-invoicing capability that can create invoices based on approved timesheets, progress logs, and expenses. You can create new invoices manually, review existing invoices, edit invoices, view statuses of invoices, cancel invoices, track invoice adjustments, and submit selected invoices for approval.

The Manage Invoice page is the central location and starting point for maintaining invoices. Use the search and sort features to streamline the search results. After you enter search criteria, access the roster area, where you can view invoice details, edit the invoice, submit invoices, or cancel invoices.

To track adjustments made to invoice lines, an Adjusted status is available for the invoice. When an adjustment is made to an invoice line amount, the system provides an entry in the Invoice Adjustment table. This lets you know that an adjustment has been made to an invoice line. If multiple adjustments are made to an invoice line, the Invoice Line Adjustment Detail page displays all the adjustments that were made to the invoice line.

When a supplier adjusts the amount on an invoice line, the invoice line Line Status field is set to Adjusted by Supplier, and the invoice header Invoice Status field is set to *Adjusted by Supplier*.

When an enterprise approver adjusts the amount on an invoice line, the invoice line Line Status field is set to *Adjusted by Enterprise* and the invoice header Invoice Status field is set to *Adjusted*.

When an adjustment has been made to an invoice by a supplier or the enterprise, a check box displays on the Manage Invoice - Line Summary page that indicates whether an invoice line has adjusted by a supplier, the enterprise, or by both. The check box is only visible if adjustments have been made to any of the invoice lines for an invoice.

See Also

"PeopleSoft Services Procurement Preface," Common Elements Used In This PeopleBook, page xxv

Prerequisites

You must define these attributes before invoicing a time sheet, expense, or progress log:

- Define invoice authorizations.
- Define whether suppliers are included in the invoice approval process.
- Define addresses.
- Define payment terms.
- Define the accounts payable interface.

Creating Invoices Manually

This section discusses how to:

- Create invoices.
- Add and view lines in invoices.

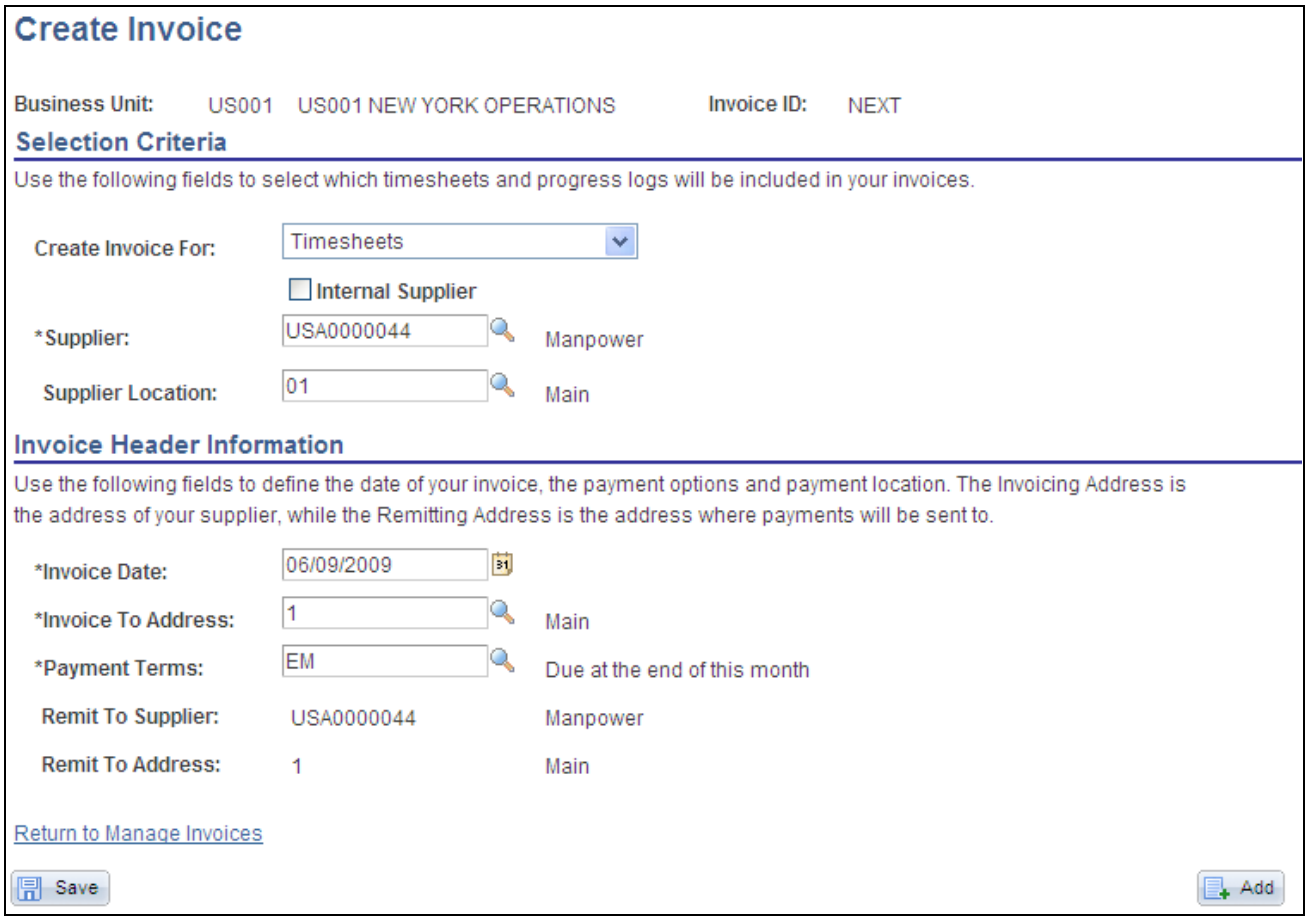
Pages Used to Create Invoices Manually

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Invoices	SPF_INV_MANAGE	Services Procurement, Manage Invoices	Add invoices, search existing invoices, submit invoices, or cancel invoices. **Note.** The From Date and Date To fields by default are the last 30 days. You may need to change the date fields to see previous invoices.
Create Invoice	SPF_INV_HDR_ADD	Enter the business unit, invoice ID, or both, and click the Add button on the Manage Invoices page.	Create invoices.
Manage Invoices - Add Lines To Invoice	SPF_INV_TE_DTLS	Save an invoice on the Create Invoice page.	Add and view lines in invoices, including all noninvoiced time sheets, expenses, and progress logs for the supplier or service provider.
Manage Invoices - Line Summary	SPF_INV_LN_DTLS	Click the Edit button for an invoice on the Manage Invoice page.	Modify the selected invoice.
Invoice Process Detail	SPF_INV_PROCES_DTL	Click the View Entry button on the Manage Invoice page. Click the Process Details link on the Manage Invoices - Line Summary page.	View invoice processing details.
Invoice To Address	SPF_ADDRESS	Click the Vendor Location Address link on the Manage Invoices - Line Summary page.	View the invoice to address.
Remit To Address	SPF_ADDRESS	Click the Remit To Address link on the Manage Invoices - Line Summary page.	View the remit to address.

Page Name	Definition Name	Navigation	Usage
Currency Information	EXCH_RT_DTL_INQ	Click the Exchange Rate Details link on the Manage Invoices - Line Summary page.	View multicurrency information.
Manage Invoices - Line Detail	SPF_INV_TIME_DTL	For resource-based invoices, click the Edit button on the Manage Invoices - Line Summary page.	View time sheet and expense invoice line details, make adjustments, or both.
Manage Invoices - Line Detail	SPF_INV_PLOG_DTL	For deliverables-based invoices, click the Edit link on the Manage Invoices - Line Summary page.	View progress log and expense invoice line details and make adjustments.
Work Order Details	SPF_WORDER_DETAIL	Click the View Work Order link on the Manage Invoices - Line Detail page.	View details of the work order related to the invoice.
Purchase Order Inquiry - Purchase Order	PO_LINE_INQ	Click the View Purchase Order button on the Manage Invoices - Line Detail page.	View details of the purchase order related to the invoice.
Approve Timesheet	SPA_TIME_APPROVE	For resource-based invoices, click the linked time sheet on the Manage Invoices - Line Detail page.	View time reports.
Services Expense Report - Services Expense Report Details	SPA_SHEET_LINES2	For either resource-based or deliverables-based invoices, click the linked expense on the Manage Invoices - Line Detail page.	View expense reports.
Progress Log Summary	SPA_PLOG_LINES	For deliverables-based invoices, click the linked progress log on the Manage Invoices - Line Detail page.	View progress reports.

Creating Invoices

Access the Create Invoice page (Services Procurement, Manage Invoices, Enter the business unit, invoice ID, or both on the Manage Invoices page, and click the Add button).



Create Invoice page

Create Invoice For

Select a basis on which you want to create an invoice. To create invoices for resource-based work orders, select *Timesheets*. To create invoices for deliverables-based work orders, select *Progress Logs*. The selected invoice basis determines the fields that appear on the invoicing pages.

Note. Invoices created for timesheets will include timesheets for resource-based and multi-resource work orders.

VMS Managed(vendor-managed service managed)

This option is available when the MSP (managed services provider) installation is not selected on the Services Procurement Installation Option page and the supplier selected on the Create Invoice page is identified as a VMS (vendor managed supplier) supplier for a business unit or service type. When you select this option, the invoice includes only time sheets, expenses, or progress logs for work orders under VMS management for which the selected supplier is the VMS supplier. When this option is not selected, the invoice includes only time sheets or progress logs for which the selected supplier is the end supplier actually providing the service.

Note. The supplier type of the VMS supplier is not a factor for VMS invoices; only the supplier type of the end supplier is considered.

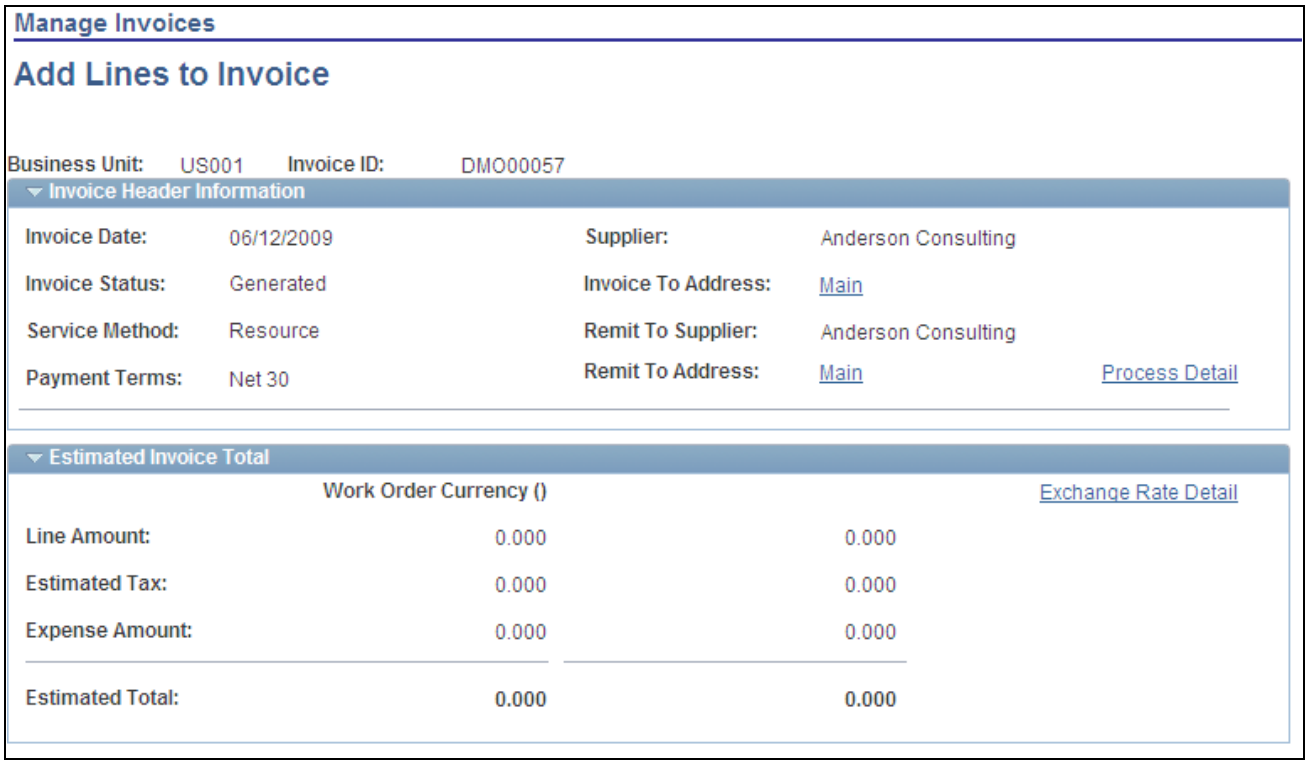
Internal Supplier	This option is available only when the MSP installation is selected on the Services Procurement Installation Options page. When you select this option, the invoice includes only time sheets, expenses, or progress logs for work orders for which the selected supplier is identified as an internal supplier. When this option is not selected, the invoice includes only time sheets or progress logs for which the selected supplier is not identified as an internal supplier.
Invoice To Address	Enter the address of the supplier.
Payment Terms	Select a payment term from the available values defined on the Single Payment Terms page.
Remit To Supplier	View the supplier who receives payment.
Remit To Address	View the address where the payments are sent.

Note. When you select or change a supplier, the Supplier Location,Invoice To Address,Remit to Supplier, and Remit to Address field values are supplied by default from the vendor base tables.

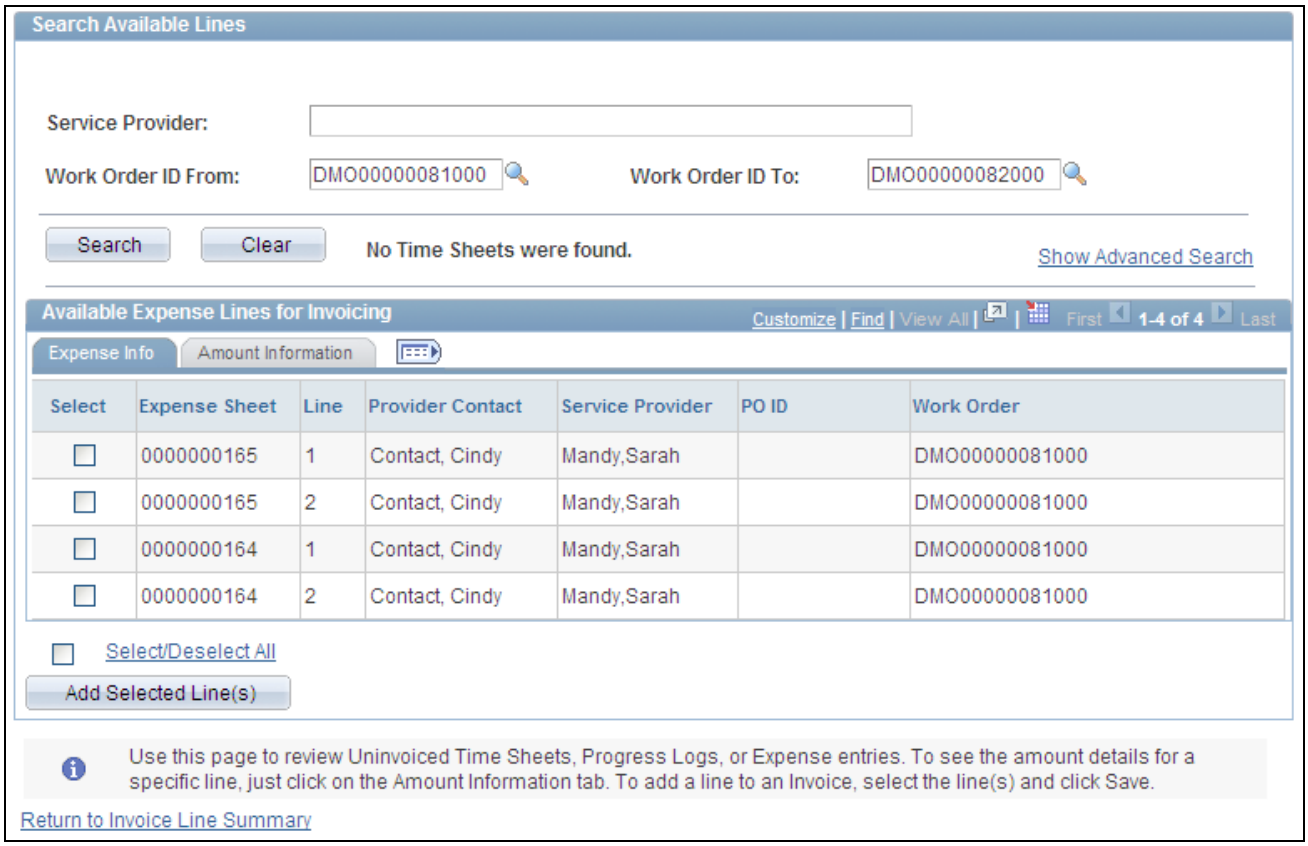
Note. The Payment Terms field value is supplied by default from the Services Supplier Information page. If no value is defined at that level, the system supplies default values defined on the vendor base tables.

Adding and Viewing Lines in Invoices

Access the Add Lines to Invoice page (save an invoice on the Create Invoice page).



Add Lines to Invoice page (1 of 2)



Add Lines to Invoice page (2 or 2)

Use this page to add individual time, progress, or expense lines to invoices. When a time sheet or progress log expense or progress log is added to an invoice, the correct time sheet line, expense line or progress log line is updated with the invoice information.

To add lines to an invoice:

1. Select the progress log and expense lines or time report and expense lines to include in the invoice.
2. Click the Add Selected Line(s) button.

   Use the Select/Deselect All check box if you want to select or deselect all the lines at one time.

Note. The available time sheets, progress log, assignment incidents, and expense lines for invoicing are limited to work orders that have a supplier location that matches the location specified on the Create Invoice page.

Generating and Printing Invoices Automatically

This section discusses how to:

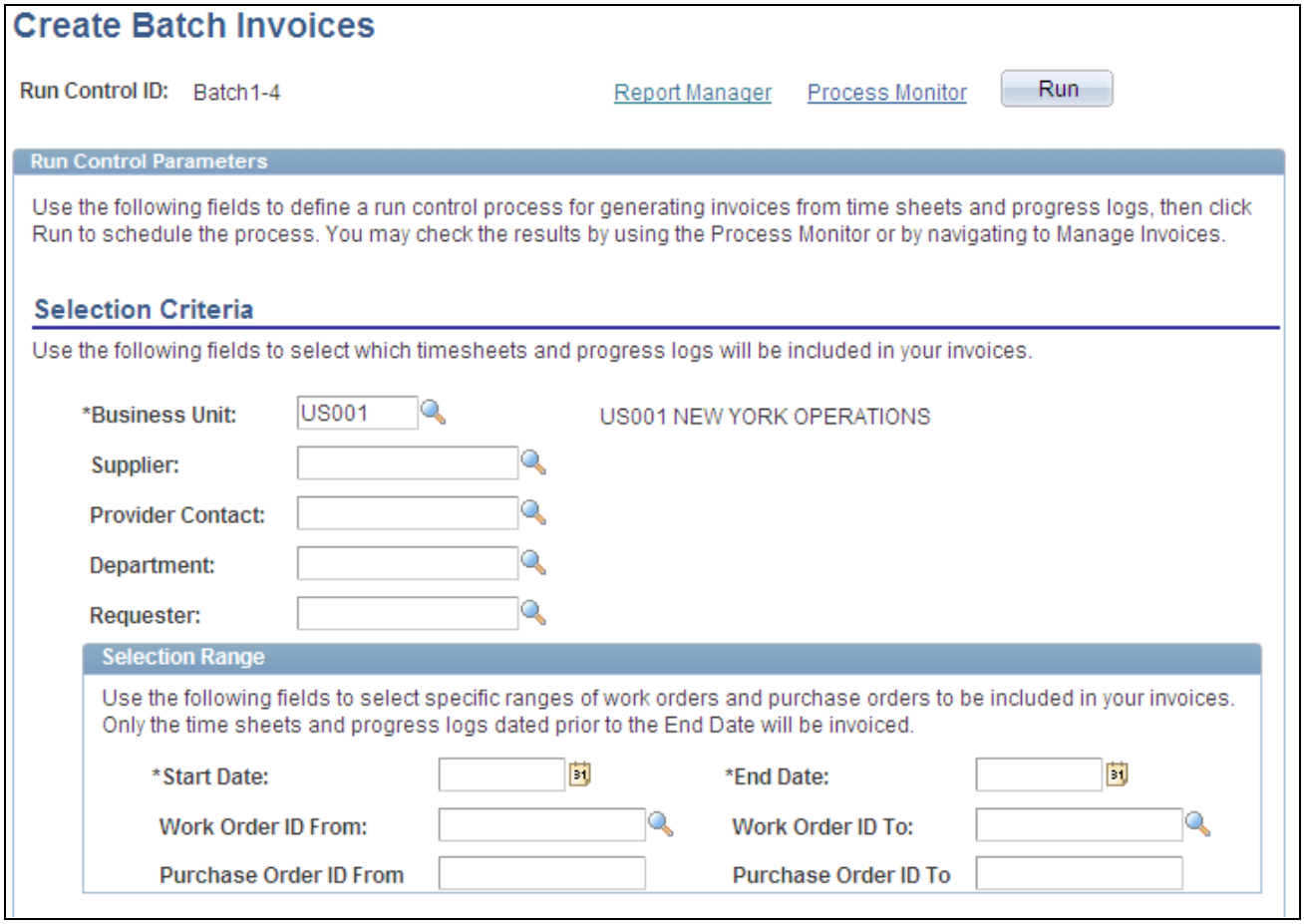
- Generate invoices.
- Print invoices.

Pages Used to Generate and Print Invoices Automatically

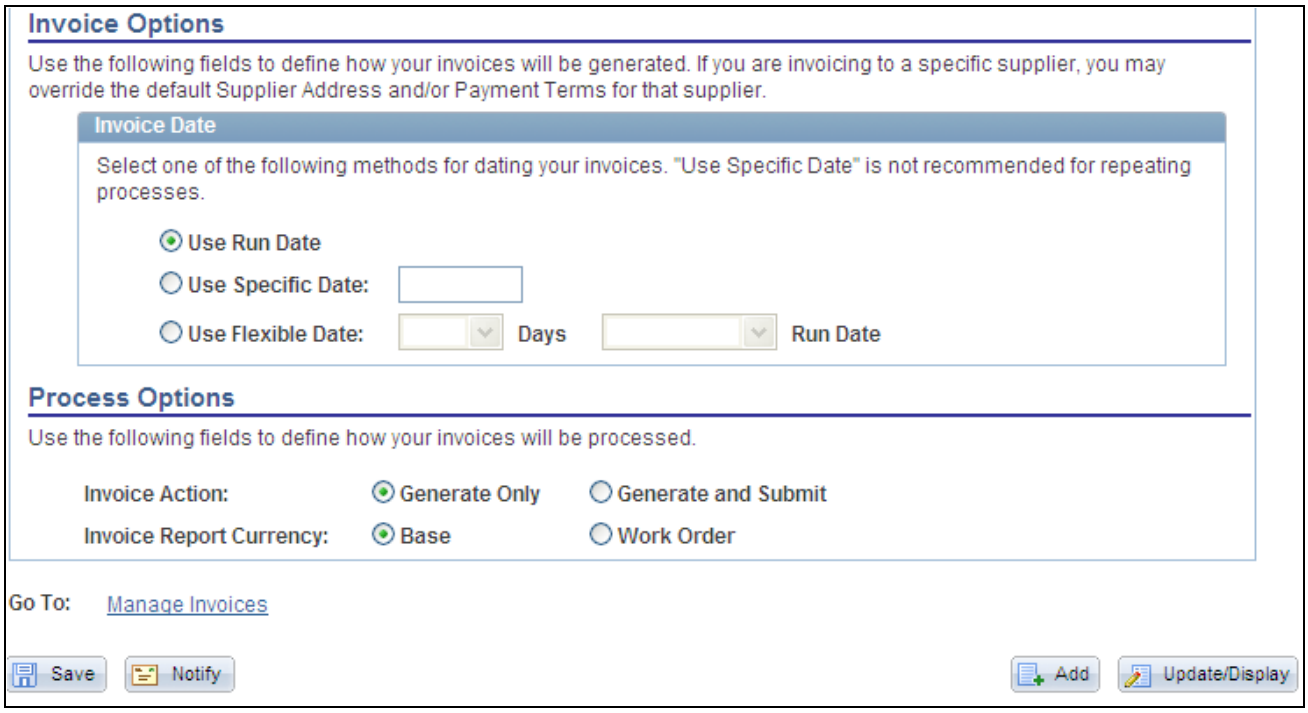
Page Name	*Definition Name*	*Navigation*	*Usage*
Create Batch Invoices	SPF_GEN_CLINV	Services Procurement, Services Settlement, Create Batch Invoices	Generate invoices for approval and printing.
Print Invoices	SPF_GEN_CINP	Services Procurement, Services Settlement, Print Invoices	Print invoices that you've generated and approved.

Generating Invoices

Access the Create Batch Invoices page (Services Procurement, Services Settlement, Create Batch Invoices).



Create Batch Invoices page (1 of 2)



Create Batch Invoices page (2 of 2)

Enter the run control parameters for the invoice process.

Business Unit Select the business unit for which invoices are generated.

Supplier Select a specific supplier to receive an invoice.

Note. If you leave this field blank, the Supplier Location,Supplier Address, and Payment Terms fields are hidden, and the process generates invoices for all suppliers associated with active work orders that meet the selection criteria. When you select a specific supplier, the supplier location, supplier address, payment terms, and service provider fields are editable.

For VMS-managed work orders, select a VMS supplier. All time sheets, progress logs, and expenses associated with the end suppliers are combined on the VMS supplier's invoice.

Supplier Location Select to filter out time sheets and progress logs the work orders of which have the same supplier and supplier location.

Note. This field is available only when a value is in the Supplier field.

Provider Contact Enter the name of the supplier provider contact who receives the invoice.

Note. If you do not enter a name, the provider contact who is associated with the work order receives the invoice.

Service Provider

Select the service provider for whom invoices are generated.

Note. If the supplier is resource-based, the lookup for service providers displays service providers.

If the supplier is deliverables-based, the lookup for service providers displays provider contacts.

If the supplier is both resource-based and deliverables-based, the lookup for service providers displays both service providers and provider contacts.

Note. This field is available only when a value is in the Supplier field.

Department

Select the department for which invoices are generated.

Requester

Select the requester for whom invoices are generated.

Selection Range

Use this section to further define generation values for the information you selected in the header.

Note. The work order ID range displays lower-level service work orders in addition to resource- and deliverables-based work orders.

Start Dateand**End Date**

Enter the range of dates for time sheets, progress logs, or expenses that are included in the invoices that you generate. The date range is also used to determine active work orders and their associated time sheets, expenses, and progress logs.

Note. The end date is used to compare different date values depending on invoicing time, expense date, or progress log completion date. For time sheets, the end date is compared to the period end date. For expenses, the transaction date is used for the comparison. For progress logs, the creation date is used for the comparison when the settlement option is *Percentage* or *Rate Based*, and the completion date is used when the settlement option is *Fixed Cost* or *Milestone.*

Note. To generate invoices for time sheets, expense reports, and progress logs that fall within a specific time period, you must enter an end date that is equal to or greater than the last end date.

For example, if you have a progress log with a completion date of July 15, 2010, a time sheet with period end date of June 29, 2010, and an expenses report with a transaction date of July 10, 2010, and you enter an end date of July 10, 2010 on the run control page, the progress log invoice is not generated.

Work Order ID Fromand **Work Order ID To**

Enter the IDs of the beginning and ending work orders for which you want to generate invoices.

Purchase Order ID Fromand **Purchase Order ID To**

Enter the beginning and ending purchase orders for which you want to generate invoices.

Invoice Options

You create invoices using a batch process that can be scheduled to run offline.

Use Run Date

Select to indicate that when the run control is scheduled to run on a recurring basis (when you use the recurrence definition), the invoice date is assigned the date of the scheduled run. If this option is selected, the current date at run time will be used as the invoice date. This is the default option. This option is appropriate for both ad hoc and recurring process runs.

Note. This option is selected by default. Refer to PeopleTools PeopleBooks for details on how to set up a recurrence definition.

Use Specific Date

Select to define the specific invoice date. This date is used regardless of the scheduled run date. If this option is selected, the user must specify a date to be used as the invoice date. This option is more appropriate for single batch process runs than for a recurring batch process run.

When you select this option, the current date is supplied by defaults. Do not select this option if you are using a recurrence definition and you want to have different invoice dates at different run times. Refer to PeopleTools PeopleBooks for details on how to set up a recurrence definition.

Use Flexible Date

Select to define invoice dates that are a specific number of days before or after a scheduled run date.

If this option is selected, the user must specify the number of days before or after the run date to be used as the invoice date. For example, if the scheduled run date is the 15th day of every month (for example, May 15) and the user specified 10 days before the run date, then the invoice date is set to May 5th.

Note. When you select this option, the default is 10 days before the scheduled run date. Refer to PeopleTools PeopleBooks for details on how to set up a recurrence definition.

Supplier Address

Select a supplier address for the invoice.

Note. When you select a specific supplier, the supplier's address can be edited. If you do not select a supplier, the field is unavailable for entry and is blank. However, the invoice process picks up the default supplier address for each supplier at run time.

Payment Terms Select payment terms for the invoice.

Note. When you select a specific supplier, the payment terms can be edited. If you do not select a supplier, the field is unavailable for entry and is blank. However, the invoice process picks up the default payment terms for each supplier at run time.

Process Options

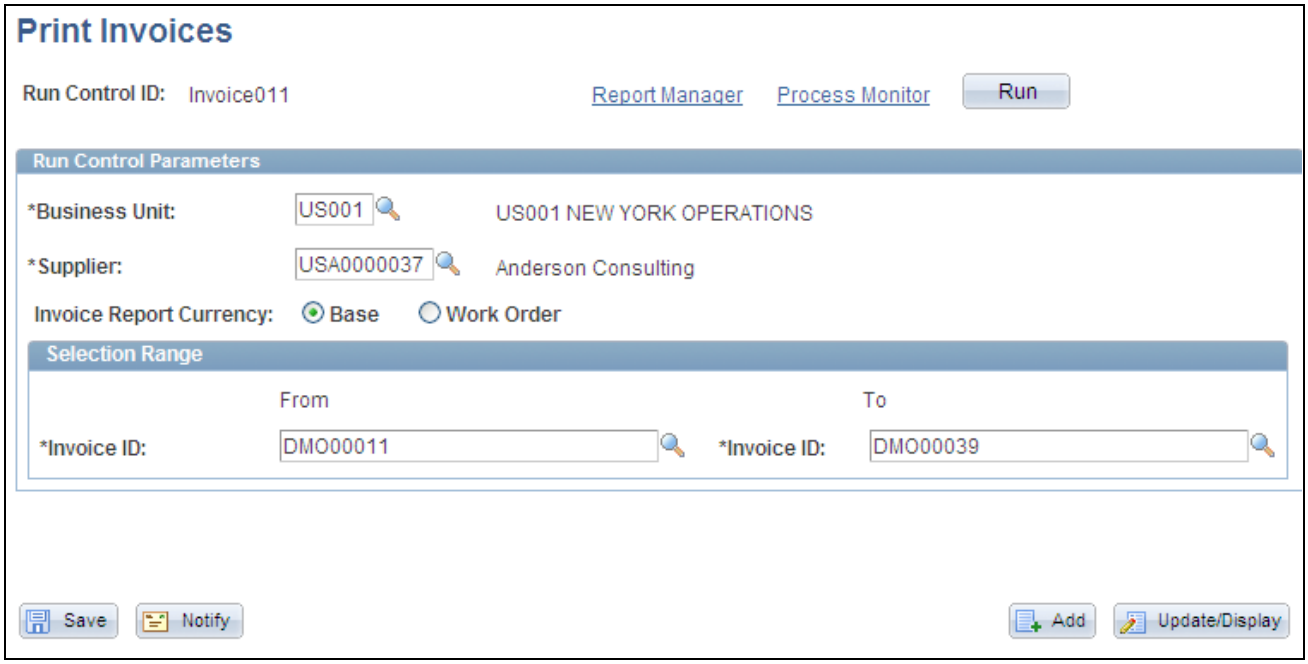
Invoice Report Currency Select whether the invoice should be created in the base currency or the work order currency. The field is disabled if the Purchasing business unit does not allow multicurrency purchase orders.

Process Results

You can run the Generate Invoice Report process (SPINV002) to generate a report about the invoices that you are processing.

Printing Invoices

Access the Print Invoices page (Services Procurement, Services Settlement, Print Invoices).



Print Invoices page

Enter the run control parameters for the invoice printing process.

Supplier	Select the supplier for whom invoices are to be printed. **Note.** For VMS-managed work orders, the VMS supplier should be selected. All time sheets, progress logs, and expenses associated with the end suppliers are combined on the VMS supplier's invoice.
Invoice Report Currency	Select to print in either the base or work order currency. The field is disabled if the Purchasing business unit does not allow multicurrency purchase orders.
From and To and**Invoice ID**	Select the range of invoices that you want to print.

Assignment Pay Based on Number of Incidents

If any assignment pay is based on the number of incidents, a separate section is included on the printed invoice.

Process Results

The Process Invoice Application Engine process (SPF_PRNTINV) processes invoices that have been generated and approved. It prints the pro forma invoice to be sent to the suppliers. This process also adds any manually created invoices to the invoice report table so that invoices can be printed.

Managing Invoices

Use the Manage Invoice page to create new invoices manually, review existing invoices, edit invoices, view statuses of invoices, cancel invoices, or submit selected invoices for approval. The Manage Invoice page is the central location and starting point for maintaining invoices. Use the search and sort features to streamline the search results. After you enter search criteria, access the roster area, where you can view invoice details, edit the invoice, submit invoices, or cancel invoices.

Note. This page displays invoices created by the sign-in user. Invoices generated by other users do not appear in this roster.

This section discusses how to:

- Search and view invoices.
- View manage invoice line summaries.
- View invoice line detail.

See Also

Chapter 22, "Managing Settlements," Creating Invoices Manually, page 560

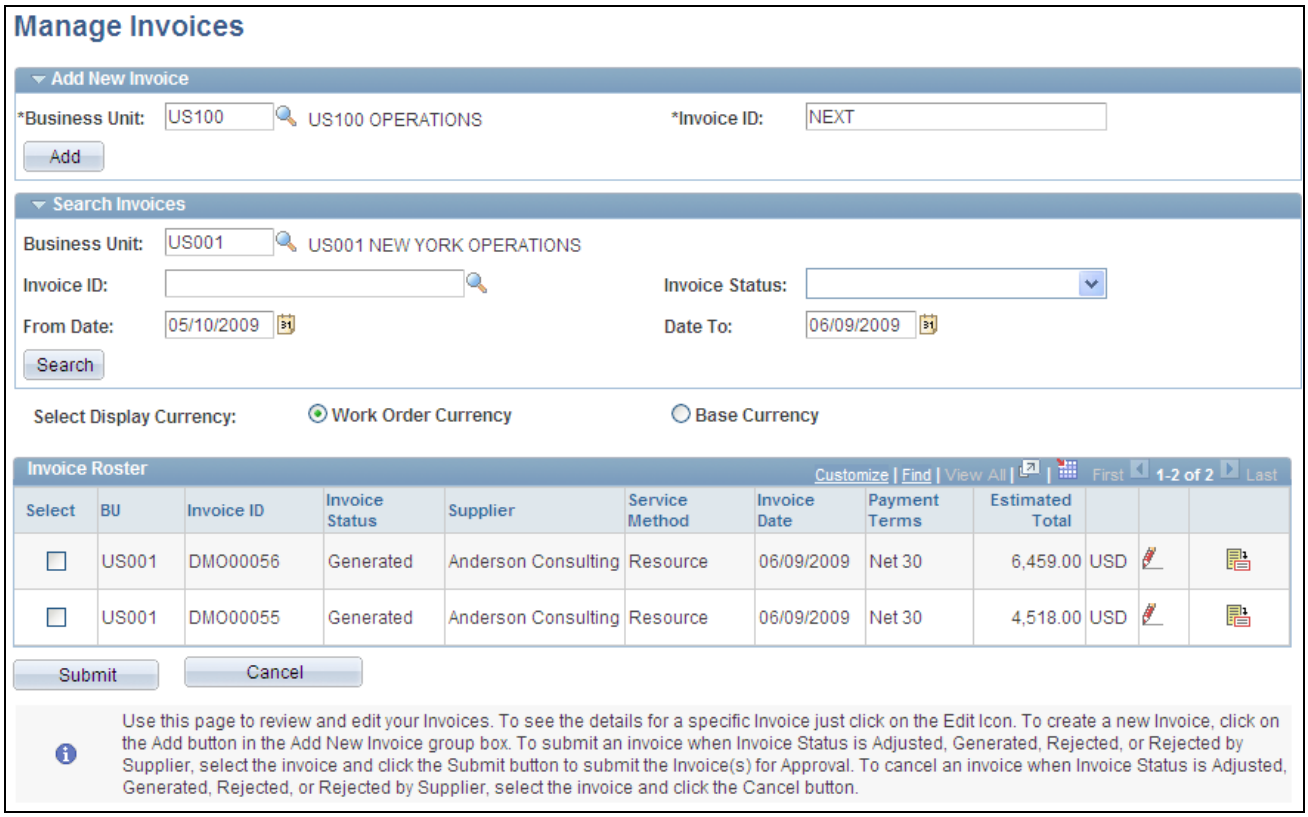
Pages Used to Manage Invoices

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Invoices	SPF_INV_MANAGE	Services Procurement, Manage Invoices	Add invoices, search existing invoices, submit invoices, or cancel invoices. **Note.** The values for the From Date and Date To fields are by default the last 30 days. You may need to change the date fields to see previous invoices.
Create Invoice	SPF_INV_HDR_ADD	Enter the business unit, invoice ID, or both on the Manage Invoices page, and click the Add button.	Create invoice header information.
Manage Invoices - Add Lines To Invoice	SPF_INV_TE_DTLS	Save an invoice on the Create Invoice page.	View all noninvoiced time sheets, progress logs, and expenses for the supplier or service provider.
Manage Invoices - Line Summary	SPF_INV_LN_DTLS	Click the Edit button for an invoice on the Manage Invoices page.	Modify the selected invoice.
Invoice Process Detail	SPF_INV_PROCES_DTL	Click the View Entry button on the Manage Invoices page. Click the Process Details link on the Manage Invoices - Line Summary page.	View invoice details.
Invoice To Address	SPF_ADDRESS	Click the Vendor Location address link on the Manage Invoices - Line Summary page.	View the invoice to address.
Remit To Address	SPF_ADDRESS	Click the Remit To Address link on the Manage Invoices - Line Summary page.	View the remit to address.
Currency Information	EXCH_RT_DTL_INQ	Click the Exchange Rate Details link on the Manage Invoices - Line Summary page.	View multicurrency information.
Work Order Details	SPF_WORDER_DETAIL	Click the View Work Order button on the Manage Invoices - Line Detail page.	View details of the work order that is related to the invoice.

Page Name	Definition Name	Navigation	Usage
Manage Invoices - Line Detail	SPF_INV_TIME_DTL	For resource-based invoices, click the Edit button on the Manage Invoices - Line Summary page.	View invoice line details, make adjustments, or both.
Manage Invoices - Line Detail	SPF_INV_PLOG_DTL	For deliverables-based invoices, click the Edit link on the Manage Invoices - Line Summary page.	View invoice line details, make adjustments, or both.
Purchase Order Inquiry - Purchase Order	PO_LINE_INQ	Click the View Purchase Order button on the Manage Invoices - Line Detail page.	View details of the purchase order that is related to the invoice.
Approve Timesheet	SPA_TIME_APPROVE	For resource-based invoices, click the linked time sheet on the Manage Invoices - Line Detail page.	View time reports.
Services Expense Report - Services Expense Report Details	SPA_SHEET_LINES2	For either resource-based or deliverables-based invoices, click the linked expense on the Manage Invoices - Line Detail page.	View expense reports.
Create Progress Log Submittal - Progress Log Summary	SPA_PLOG_LINES	For deliverables-based invoices, click the linked progress log on the Manage Invoices - Line Detail page.	View progress log reports.

Searching and Viewing Invoices

Access the Manage Invoices page (Services Procurement, Manage Invoices).



Manage Invoices page

You can access this page when you sign in as the PeopleSoft Services Procurement invoice manager.

Search Invoices

Enter search criteria to use to retrieve, edit, and view invoices.

Select Currency

Displays amounts in either base or work-order currency. The Select Currency field is available only if Allow Multicurrency is selected on the Services Procurement business unit page.

See Chapter 4, "Setting Up PeopleSoft Services Procurement," Setting Up Business Unit Definitions, page 32 .

Note. Invoices are generated in both base and work-order currency.

Invoice Roster

Estimated Total Displays the estimated total, including expenses and estimated prorated tax.

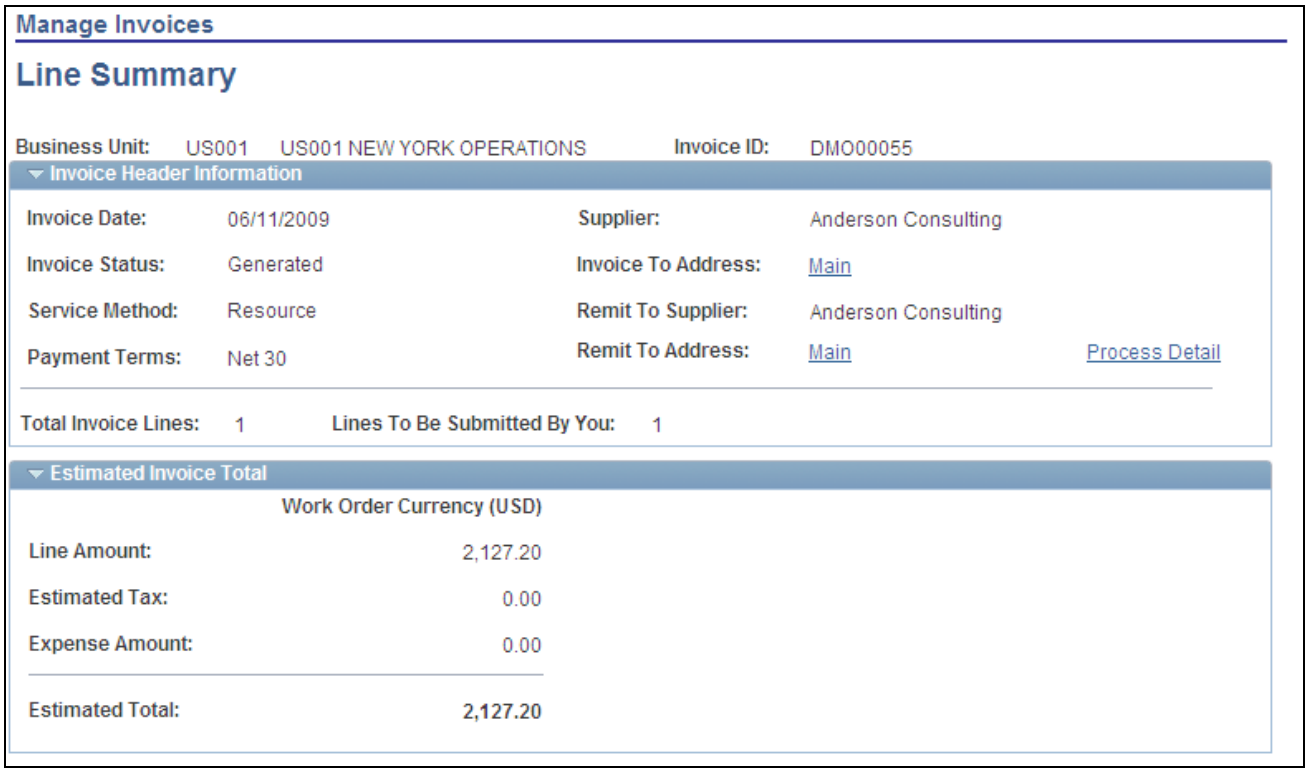
Note. The sales and use tax (SUT) included in the estimated total includes only the sales tax. The use tax is displayed as a separate line item on the Invoice Detail page.

	Click the Edit button to access the Manage Invoice Line Summary page, where you can review and edit invoice lines.
	Click the View Entry button to access the Invoice Process Detail page, where you can review invoice processing information.
Submit	Click to submit selected invoices for approval.
Cancel	Click to cancel selected invoices. Canceling invoices releases the time sheet, progress log, or expense associated with that invoice so that it can be invoiced again.

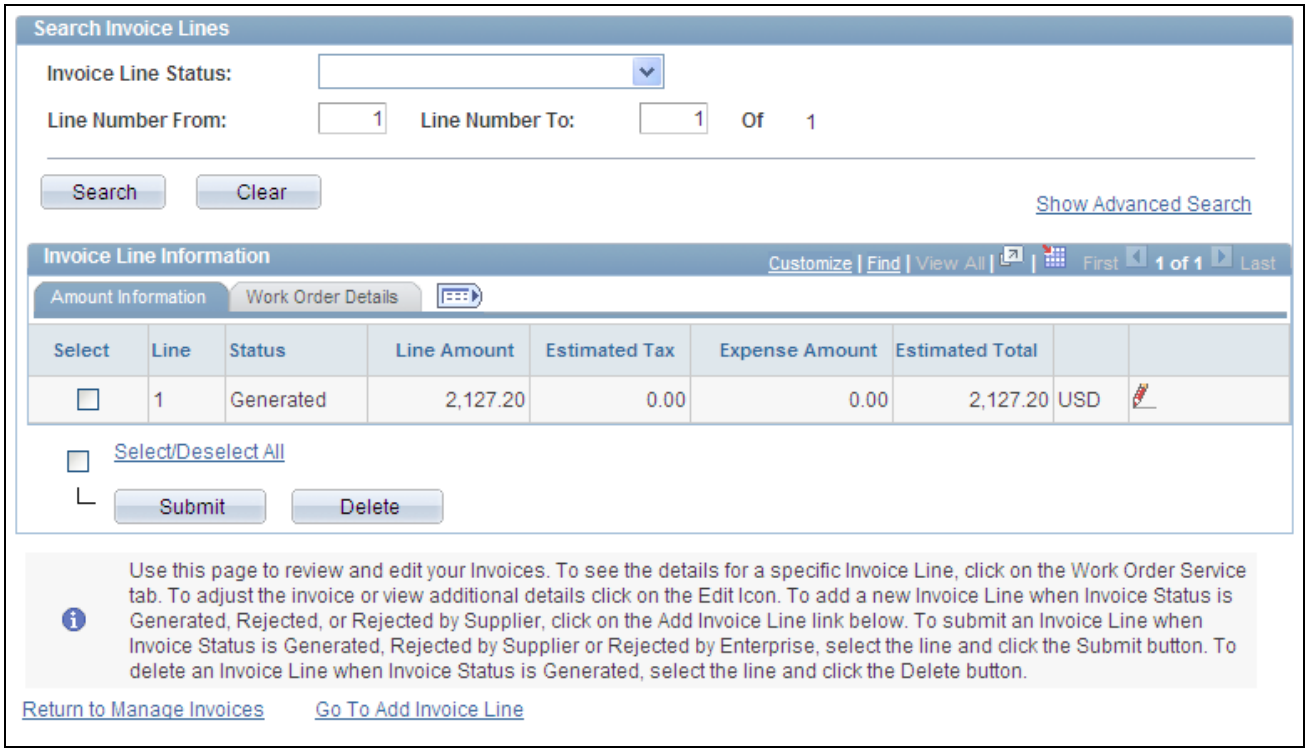
Note. You can adjust invoices by adjusting the associated time sheets, progress logs, or expense amounts. If the adjusted time sheet, progress log, or expense is included in an invoice, the status of the invoice line associated with the adjustment is changed to *Canceled* and the invoice header status is changed to *Adjusted.* You can also adjust invoices after the invoice has been generated by adjusting the amounts on the Manage Invoice Line Detail page. Adjusting invoices in this manner does not change existing time sheets, progress logs, or expenses. Adjustments can be made prior to invoices being approved by either the supplier invoice approver or the enterprise invoice approver.

Viewing Manage Invoice Line Summaries

Access the Manage Invoices - Line Summary page (click the Edit button for an invoice on the Manage Invoices page).



Manage Invoice - Line Summary page (1 of 2)



Manage Invoice - Line Summary page (2 of 2)

The data appearing in the Invoice Header Information and Estimated Invoice Total sections depends on whether the invoice is for VMS services.

Business Unit Displays the business unit associated with the invoice.

Invoice ID Displays the number automatically or manually assigned to the invoice when it is created.

Invoice Header Information

Invoice Date Displays the creation date of the invoice.

Invoice Status Displays the current status of the invoice. Values are:

- *Adjusted by Supplier:* When a supplier adjusts the amount on an invoice line, the system sets the invoice line status to *Adjusted by Supplier,* and the invoice header to *Adjusted.* When an enterprise approver adjusts the amount on an invoice line, the system sets the invoice line status to *Adjusted by Enterprise* and the invoice header status to *Adjusted.*
- *Approved by Supplier:* The supplier invoice approver has approved all lines, and the invoice has not been processed.
- *Approved by Enterprise:* The invoice approver has approved all lines, and the invoice has not been processed.
- *Canceled:* The invoice has been canceled and the related time sheets, progress logs, or expenses have been released to be re-invoiced.
- *Generated:* The line has been created but not yet submitted for approval.
- *Processed:* All lines have been approved and the invoice has been processed.
- *Submitted to Enterprise:* The invoice has been submitted for approval, but the line has not yet been approved or rejected.
- *Submitted to Supplier:* The invoice has been submitted for approval to the supplier, but the line has not yet been approved or rejected.
- *Rejected by Enterprise:* The approver has rejected the line.
- *Rejected by Supplier:* The supplier invoice approver has rejected the line.

Payment Terms Displays the payment terms assigned to the invoice.

Supplier Displays the end supplier who performed the service. This option appears only in the Invoice Header Information section when invoices are not VMS-managed. The supplier appears at the line level when invoices are VMS-managed.

VMS Suppler

Displays the VMS supplier that manages the work orders for time and progress invoices. This option appears only in the Invoice Header Information section for VMS invoices.

Estimated Invoice Total

Line Amount

Displays the total invoice amount in base or work-order currency.

Any assignment pay based on time is included with the base pay in the line amount.

Any assignment pay based on number of incidents is displayed in the Time/Expense Details group box, and is not included in the line amount.

Estimated Tax

Displays the total estimated tax for the invoice.

Expense Amount

Displays the total expense amount in base or work-order currency.

Estimated Total

Displays the estimated total for the invoice.

VMS Fee

Displays the amount paid to the VMS suppler for managing the service.

The data appearing in the Invoice Line Information grid depends on the selected service method and whether the invoice is for VMS services. Select the Base Currency or Work Order Currency option to display amounts.

View the estimated tax and estimated total amount for the invoice.

Note. This option appears and is included only in the Estimated Invoice Total for VMS invoices.

MSP Fee

Displays the amount paid to the MSP supplier for managing the service.

Note. This option appears and is included in the estimated invoice total only if MSP is installed and the supplier is an internal supplier.

External suppliers can view MSP fees; however, the fee is not included in the estimated total.

Invoice Line Information: Amount Information

Select the Amount Information tab.

Click the Line Details button to access the line details.

Invoice Line Information: Work Order Details

Select the Work Order Details tab.

Work Order	Links to the related work order for viewing more details. If the work order is for a multi-resource service, the individual child work order is listed here. The related parent work order appears in the Parent Work Order field.
Parent Work Order	Links to the parent work order for multi-resource work orders.
Supplier	Displays the end supplier who performed the service. This option appears only for VMS invoices.
Provider Contact	Displays the provider contact for the work order.
Time Sheet ID	Displays the time sheet for the invoice line and has a value only for time sheet lines.
Expense Sheet ID	Displays the expense sheet for the invoice line and has a value for expense lines.
Progress Log ID	Displays the progress log for the invoice line. Appears only for deliverable invoices and has a value only for progress lines.
Activity	Displays the activity for the invoice line. This option appears only for deliverable invoices. **Note.** For deliverables-based requisitions, the rate-based activity is displayed in the Invoice Line Information region.
Submit	Click to submit the selected invoice lines for approval. **Note.** Until all lines have been submitted for approval, the invoice header status remains *Generated.*
Delete	Click to remove the selected line from the invoice. Deleting the invoice line releases the time sheet, progress log, or expense associated with that invoice so that it can be invoiced again.

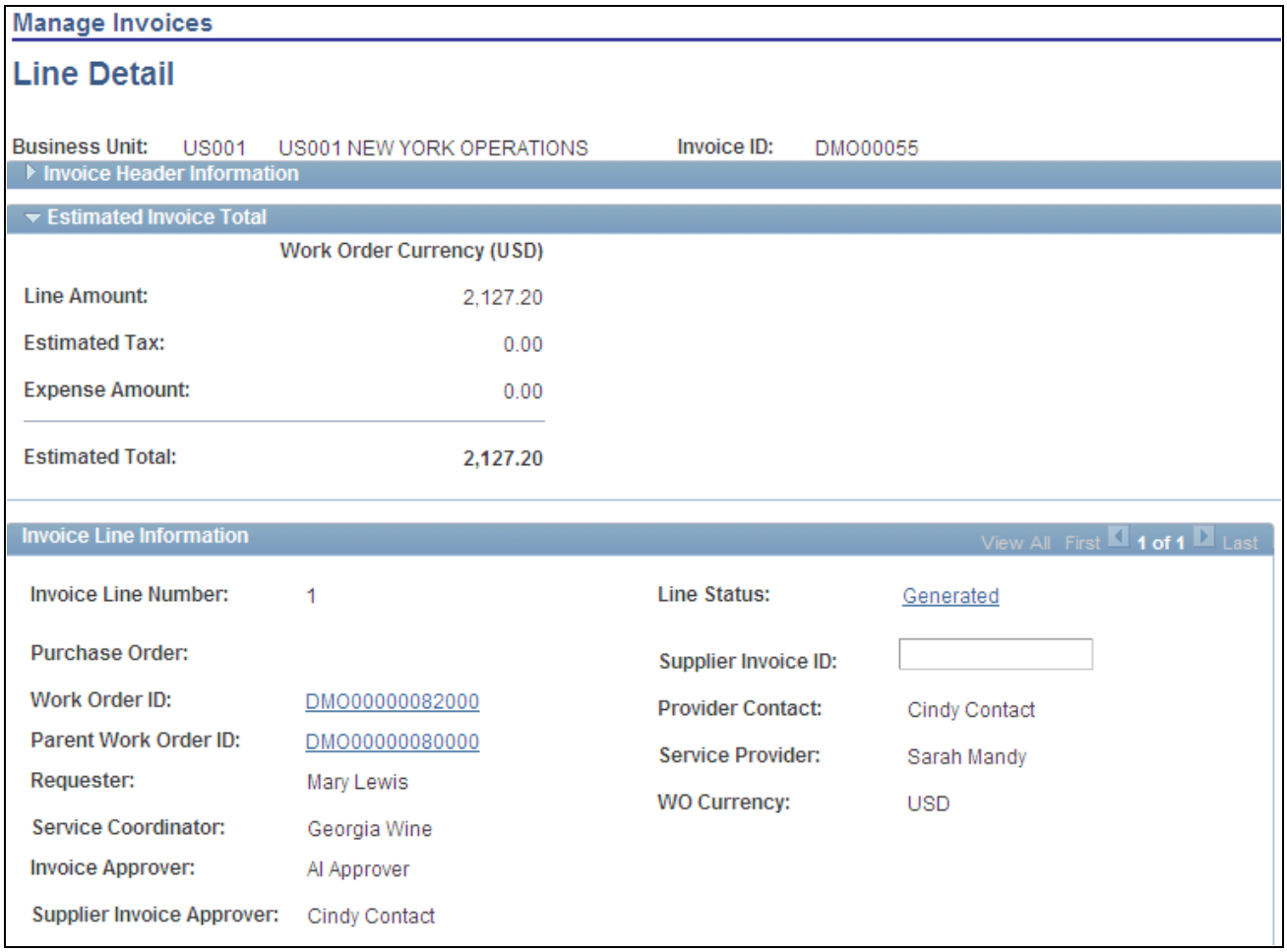
See Also

Chapter 4, "Setting Up PeopleSoft Services Procurement," Setting Up Business Unit Definitions, page 32

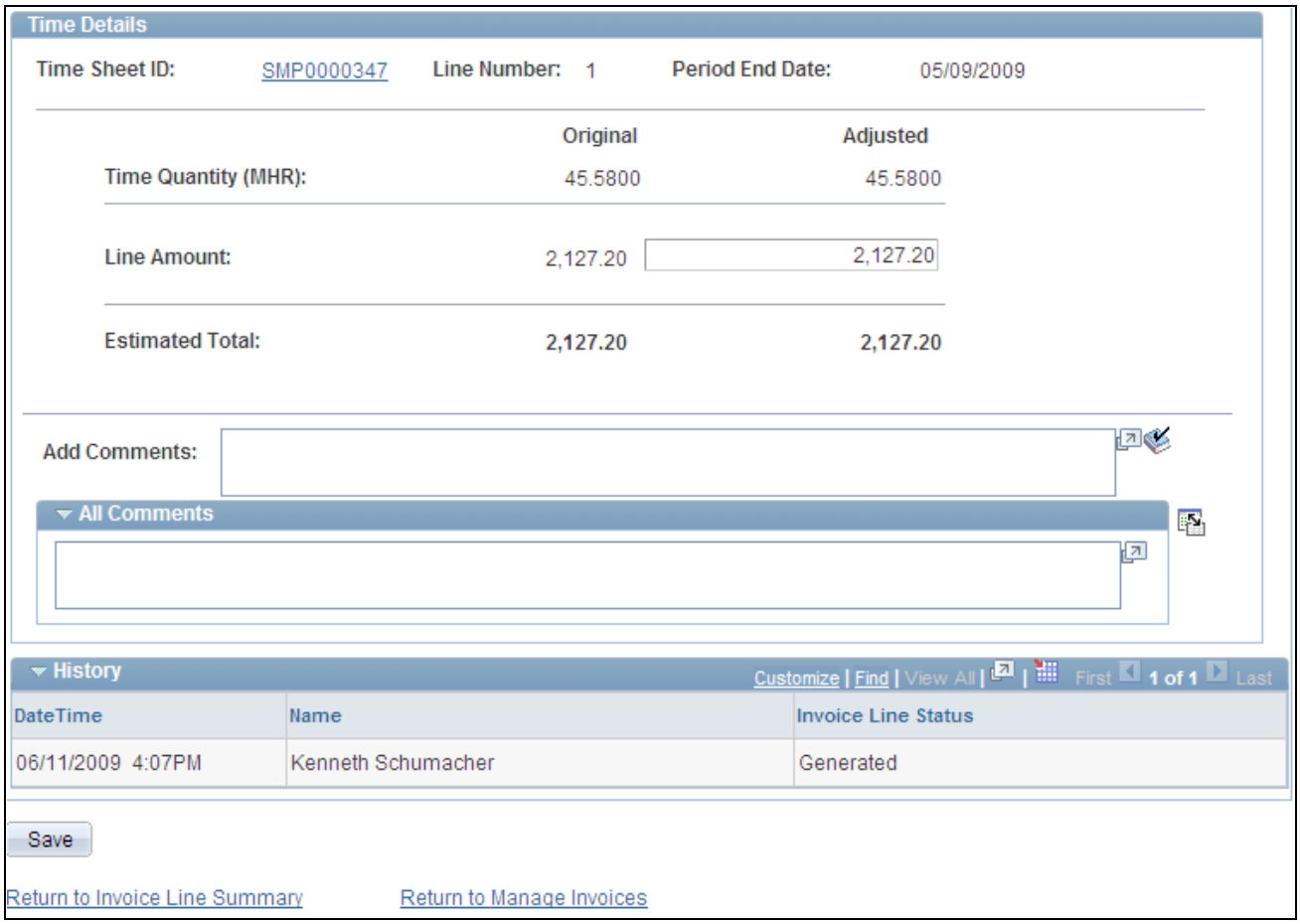
Chapter 10, "Establishing and Managing VMS," page 257

Viewing Invoice Line Details

Access the Manage Invoices - Line Detail page (click the Edit button on the Manage Invoices - Line Summary page).



Manage Invoices - Line Detail page (1 of 2)



Manage Invoices - Line Detail page (2 of 2)

The information appearing on this page depends on the selected service method. Click the View Adjustments link to access details about the adjustments that have been made to an invoice line.

For multi-resource work orders, this page displays only the header work order ID in the invoice line information section. You can click the Parent Work Order ID link to access the work order header page. Click the Work Order ID link to access the lower-level service associated to the work order for an invoice line.

Invoice Line Information

Invoice Line Number Displays the number automatically assigned to the invoice line when it is created. Allows adjustments to the progress log line amount.

Line Status

Displays the current status of the invoice line. Values are:

- *Generated:* The line has been created but not yet submitted for approval.
- *Submitted:* The invoice has been submitted for approval, but the line has not yet been approved or rejected.
- *Submitted to Supplier:* The invoice has been submitted for approval to the supplier, but the line has not yet been approved or rejected.
- *Rejected:* The approver has rejected the line.
- *Adjusted by Enterprise:*

  The enterprise approver has adjusted the amount on an invoice line, the invoice line status is set to Adjusted by Enterprise, and the invoice header status is set to Adjusted.
- *Adjusted by Supplier:* The supplier has adjusted the amount on an invoice line, the invoice line status is set to Adjusted by Supplier, and the invoice header status is set to Adjusted.
- *Approved by Supplier:* The supplier has approved all lines.
- *Approved:* The invoice approver has approved all lines.

Purchase Order

Click to view the purchase order assigned to the work order associated with the services included on the invoice line.

Note. The button is available only if the PO Work Order Integration (purchase order work order integration) check box is selected on the Services Procurement Installation Options page.

Supplier Invoice ID

Enter the supplier's invoice ID for each invoice line. This field is for reference only in the event that the supplier uses a different invoice ID.

Work Order ID

Click to view the work order associated with the services included on the invoice line.

Provider Contact

Displays the provider contact assigned to the work order associated with the services included on the invoice line.

Requester

Displays the requester assigned to the work order associated with the services included on the invoice line.

WO Amount Remaining(work order amount remaining)

Displays the amount still available for the work order. This amount is updated when invoices are approved. This field does not appear for multi-resource work orders.

Service Provider	Displays the name of the individual service provider associated with the services included on the invoice line. **Note.** This value displays for resource-based engagements only.
Invoice Approver	Displays the invoice approver assigned to the work order associated with the services included on the invoice line.
Supplier Invoice Approver	Displays the supplier invoice approver assigned to the work order that is associated with the services included on the invoice line. This option appears only for suppliers who are included in the invoice approval process.

Time/Expense Details - Resource-Based Invoices

Adjustments can be made after the invoice has been generated and not yet approved. Once approved, invoices cannot be adjusted.

Timesheet ID or **Expense Sheet ID**	Displays the time sheet or expense associated with the invoice line. Click to view the time sheet or expense details.
Period End Date	Displays the period end date of the time sheet associated with the invoice line.
VAT Applicability (value-added tax applicability)	Indicates whether value-added tax (VAT) applies to this invoice. If VAT Applicability is *Taxable*, the system displays the VAT percentage and VAT amount information.
SUT Applicability(sales tax or use tax applicability)	Indicates whether sales tax or use tax (SUT) applies to this invoice. If SUT Applicability is *Sales Tax* or *Direct Pay/Sales Tax*, then the Sale Tax % and Sales Tax Amount fields appear. If the value is *Use Tax*, then the system displays the use tax percentage and the use tax amounts. **Note.** Use tax is not included in the invoice total and is displayed for informational purposes only. Suppliers can view only the sales tax, not the use tax.
Original/Adjusted Time Quantity	Displays the original and adjusted time quantity for resource-based invoices. No manual adjustments are allowed for this field.
Original/Adjusted Line Amount	Displays the amounts based on the original and adjusted time quantity. You can adjust the line amount in the work order currency and the system automatically converts to base currency if the multicurrency option applies.

Original/Adjusted MSP Fee (original/adjusted managed services provider fee)	Displays the MSP fee. This option appears and is included in the estimated invoice total only if MSP is installed and the supplier is an internal supplier. External suppliers will have the MSP fee shown, but not included in the estimated invoice total. No manual adjustments are allowed for this field, but any adjustments made to the line amount recalculates the adjusted MSP fee.
Original/Adjusted VMS Fee (original/adjusted vendor-managed service fee)	Displays the VMS fee. This option appears only for VMS invoices. No manual adjustments are allowed for this field, but any adjustments made to the line amount recalculates the adjusted VMS fee.
Original/Adjusted Expenses	Displays the original and adjusted expenses from the expense sheet associated with the invoice line. You can enter adjustments prior to approval, but the adjustment must be made in the work order currency. The system automatically converts to base currency.
Original/Adjusted Total	Displays the total of the original and adjusted line amount, the original and adjusted expenses, and any associated fees and taxes.
VAT Percent(value-added tax percent)	Displays the actual VAT percentage. You can adjust the original VAT percentage for resource-based invoices. **Note.** The field is not available if VAT is not applicable.
Estimated VAT (estimated value-added tax)	Displays the estimated VAT amount. Adjusting the line amount or VAT percentage recalculates the estimated VAT amount. **Note.** The field is hidden if VAT is not applicable.
Sales Tax Percent/Use Tax Percent	Displays the estimated sales tax percentage if the tax applicability is sales tax or direct pay. If tax applicability is use tax, then the system displays the estimated use tax percent. You can adjust the tax percentage, which recalculates the estimated SUT amounts. **Note.** The field is not available if SUT Applicability value is not*Sales Tax* or *Direct Pay/Sales Tax.*
Includes VAT (includes value-added tax)	Indicates whether the estimated VAT amount is to be added to the line amount before SUT is calculated. If yes, the VAT amount is added to the line amount before SUT is calculated. Otherwise, the line amount is used for VAT calculations. **Note.** The field is not available if VAT and SUT are not applicable.

Estimated Sales Tax

Displays the estimated sales tax. Adjusting the line amount or SUT percentage recalculates the estimated sales tax amount. If the Includes VAT option is yes, then adjusting the VAT percentage also recalculates the estimated sales tax amount.

Note. The field is not available if SUT Applicability value is not*Sales Tax* or *Direct Pay/Sales Tax.*

Original/Adjusted Assignment Incidents

Displays the number of assignments based on incidents associated with the invoice.

Line Amount

Displays the sum of all items associated with the invoice line.

Estimated Total

Displays the sum of the line amount, expense amount, VMS or MSP fees, and VAT or sales tax.

Estimated Use Tax

Displays the estimated sales tax. Adjusting the line amount or SUT percentage recalculates the estimated sales tax amount. If the Includes VAT option is yes, then adjusting the VAT percentage also recalculates the estimated sales tax amount.

Note. The field is not available if SUT Applicability is not*Use Tax.*

Progress Log Details - Deliverables Based Invoices

Progress Log ID or **Expense Sheet ID**

Displays the progress log or expense associated with the invoice line. Click to view the progress log or expense details.

Activity

Displays the activity associated with the invoice line.

Note. This field is not visible if the settlement option on the work order associated with the invoice line is set to *Percentage.*

% Complete (percent complete)

Displays the total percent completed.

Note. This field is visible only if the settlement option on the work order associated with the invoice line is set to *Percentage.*

Rate

Displays the rate from the work order associated with the invoice line.

Note. This field is visible only if the settlement option on the work order associated with the invoice line is set to *Rate Based.*

UOM (unit of measure)

The unit of measure that is defined for the rate.

Note. This field is visible only if the settlement option on the work order associated with the invoice line is set to *Rate Based.*

Quantity	Displays the number of units being billed on the invoice line. **Note.** This field is visible only if the settlement option on the work order associated with the invoice line is set to *Rate Based.*
VAT Applicability(value-added tax applicability)	Indicates whether VAT applies to this invoice. If VAT Applicability is *Taxable*, the system displays the VAT percentage and VAT amount information.
SUT Applicability(sales and use tax applicability)	Indicates whether SUT applies to this invoice. If SUT Applicability is *Sales Tax* or *Direct Pay/Sales Tax*, then the Sale Tax % and Sales Tax Amount fields appear. If the value is *Use Tax*, then the system displays the use tax percentage and the use tax amounts. **Note.** Use tax is not included in the invoice total and is displayed for informational purposes only. Suppliers can view the sales tax only, not the use tax.
Original/Adjusted Line Amount	Displays the amounts based on the original and adjusted progress log for this invoice line. You can adjust the line amount in the work order currency and the system automatically converts to base currency if the multicurrency option applies.
Original/Adjusted MSP Fee (original/adjusted managed services provider fee)	Displays the MSP fee. This option appears and is included in the estimated invoice total only if MSP is installed and the supplier is an internal supplier. External suppliers can view MSP fees; however, the fee is not included in the estimated invoice total. No manual adjustments are allowed for this field. Any adjustments made to the line amount recalculate the adjusted MSP fee.
Original/Adjusted VMS Fee (original/adjusted vendor-managed service fee)	Displays the VMS fee. This option appears only for VMS invoices. No manual adjustments are allowed for this field. Any adjustments made to the line amount recalculate the adjusted VMS fee.
Original/Adjusted Expenses	Displays the original and adjusted expenses from the expense sheet associated with the invoice line. You can enter adjustments prior to approval, but the adjustment must be made in the work order currency. The system automatically converts to base currency.
Original/Adjusted Total	Displays the total of the original and adjusted line amount, the original and adjusted expenses, and any associated fees and taxes.
VAT Percent(value-added tax percent)	Displays the actual VAT percentage. Enables you to adjust the actual VAT percentage for resource-based invoices. **Note.** The field is hidden if VAT is not applicable.

Estimated VAT (estimated value-added tax)	Displays the estimated VAT amount. Adjusting the line amount or VAT percentage recalculates the estimated VAT amount **Note.** The field is hidden if VAT is not applicable.
Sales Tax Percent/Use Tax Percent	Displays estimated sales tax percentage if tax applicability is sales tax or direct pay. If tax applicability is use tax, then the system displays the estimated use tax percent. You can adjust the tax percentage, which recalculates the estimated SUT amounts. **Note.** This field is visible only if SUT Applicability is not*Sales Tax* or *Direct Pay/Sales Tax.*
Includes VAT (includes value-added tax)	Indicates whether the estimated VAT amount is to be added to the line amount before SUT is calculated. If yes, the VAT amount is added to the line amount before SUT is calculated. Otherwise, the line amount is used for VAT calculations. **Note.** This field is not available if VAT and SUT are not applicable.
Estimated Sales Tax	Displays the estimated sales tax. Adjusting the line amount or SUT percentage recalculates the estimated sales tax amount. If the Includes VAT option is yes, then adjusting the VAT percentage also recalculates the estimated sales tax amount.
Estimated Total	Displays the sum of the line amount, expense amount, VMS or MSP fees, and VAT or sales tax.
Estimated Use Tax	Displays the estimated sales tax. Adjusting the line amount or SUT percentage recalculates the estimated sales tax amount. If the Includes VAT option is yes, then adjusting the VAT percentage also recalculates the estimated sales tax amount. **Note.** The field is not available if SUT Applicability is not*Use Tax.*

Approving Invoices

The Manage Invoice Approval page is the central location for reviewing and approving invoices.

Note. Similar approval pages are provided for the supplier role.

This section discusses how to:

- Manage invoice approvals.
- View invoice approval line summaries.
- View invoice approval line detail.

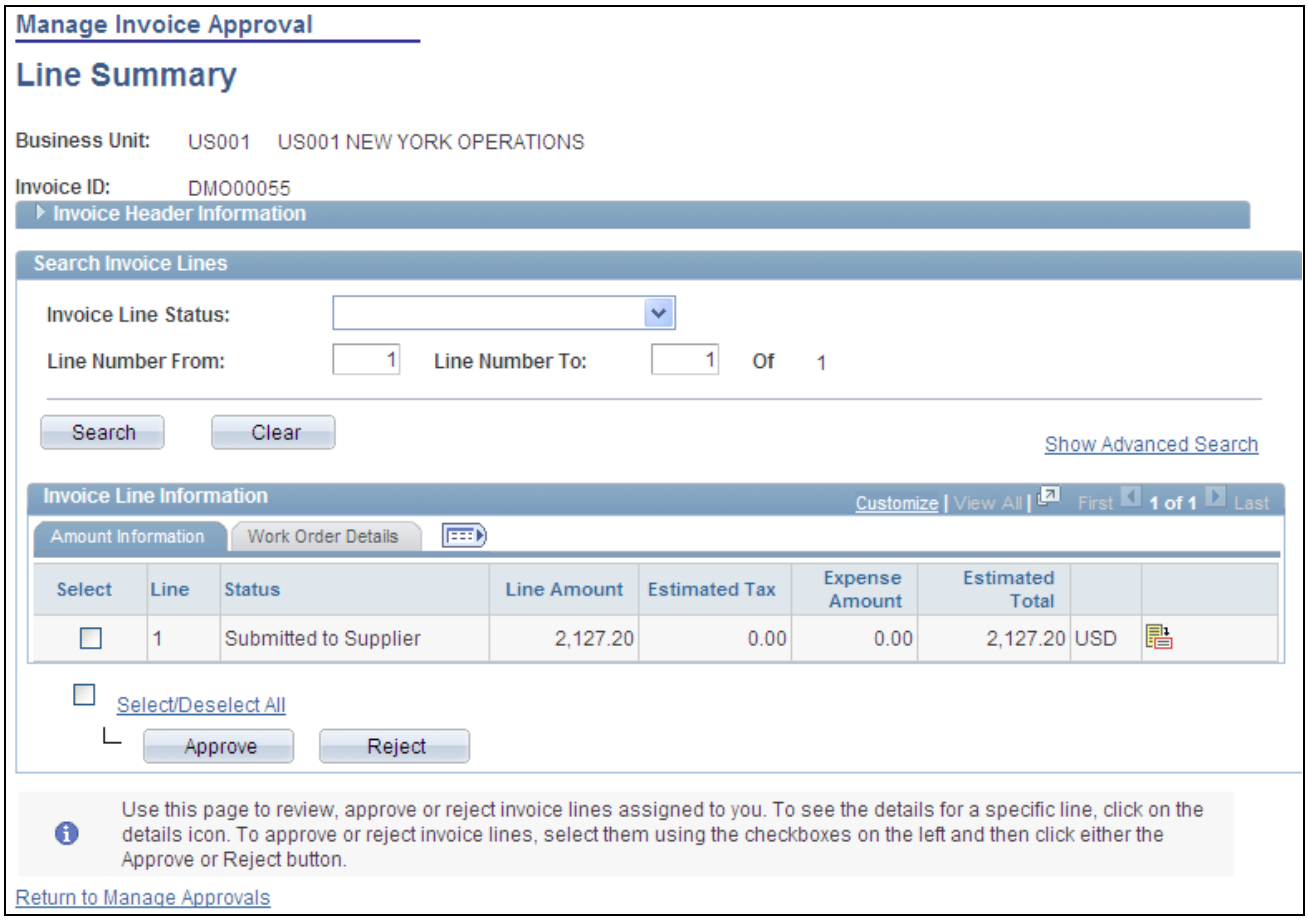
Pages Used to Approve Invoices

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Invoice Approval	SPF_INV_APR_MANAGE	Services Procurement, Services Settlement, Approve Invoices	Review, accept, or reject invoice approvals.
Manage Invoice Approval - Line Summary	SPF_INV_APR_LNDTL	Click the Invoice Approval Line Summary button on the Manage Invoice Approval page.	View invoice lines that you are authorized to approve.
Manage Invoice Approval - Line Detail (resource-based)	SPF_INV_APR_TIME_D	Click the Line Details button for a resource-based invoice on the Manage Invoice Approval - Line Summary page.	View invoice line details, make adjustments to line amounts, expenses, and tax percentages, and enter comments before approving or rejecting the invoice line.
Invoice Approval Line Detail (deliverables-based)	SPF_INV_APR_PLOG_D	Click the Line Details button for a deliverables-based invoice on the Manage Invoice Approval - Line Summary page.	View invoice line details, make adjustments to line amounts, expenses, and tax percentages, and enter comments before approving or rejecting the invoice line.
Invoice To Address	SPF_ADDRESS	Click the Vendor Location Address link on the Manage Invoice Approval - Line Summary page.	View the supplier's invoice to address.
Remit To Address	SPF_ADDRESS	Click the Remit To Address link on the Manage Invoice Approval - Line Summary page.	View the supplier's remit to address.
Currency Information	EXCH_RT_DTL_INQ	Click the linked currency abbreviation on the Manage Invoice Approval - Line Summary page.	View multicurrency information.
Work Order Details	SPF_WO_REQ_VEN_DT	Click a linked work order on the Manage Invoice Approval - Line Summary page or the Manage Invoice Approval - Line Detail page.	View details of the work order related to the invoice.
Purchase Order Inquiry - Purchase Order	PO_LINE_INQ	Click the View Purchase Order button on the Manage Invoice Approval - Line Detail page.	View details of the purchase order related to the invoice.

Page Name	Definition Name	Navigation	Usage
Approve Timesheet	SPA_TIME_APPROVE	For resource-based invoices, click the linked time sheet on the Manage Invoice Approval - Line Detail page.	View time reports.
Services Expense Report - Services Expense Report Details	SPA_SHEET_LINES2	For either resource-based or deliverables-based invoices, click the linked expense on the Manage Invoice Approval - Line Detail page.	View expense reports.
Create Progress Log Submittal - Progress Log Summary	SPA_PLOG_LINES	For deliverables-based invoices, click the linked progress log on the Manage Invoice Approval - Line Detail page.	View progress log reports.

Managing Invoice Approvals

Access the Manage Invoice Approval page (Services Procurement, Services Settlement, Approve Invoices).



Manage Invoice Approval - Line Summary: Amount Information tab

As an internal approver, you can access this page when you sign in as a PeopleSoft Services Procurement invoice approver.

Search and Sort Invoices

Enter criteria used to retrieve submitted invoices.

Note. This page displays only invoice and invoice lines that the sign-in user is authorized to approve. Authorization is defined on the Work Order page when the work order is created. If the supplier is to be included in the invoice approval process, the option must be selected on the Services Supplier Information page. The specific supplier invoice approver id identified on the work order when the supplier is set up to be included in the approval process.

Invoice Roster

Click the Line Summary button to access the Invoice Line Summary page to view details associated with the line.

Approve and Reject Click to approve or reject the selected invoices.

When a line is rejected, the invoice header status is set to Rejected. The invoice manager who creates that invoice can then review the rejected invoice, make any necessary adjustments, and resubmit the invoice for approval.

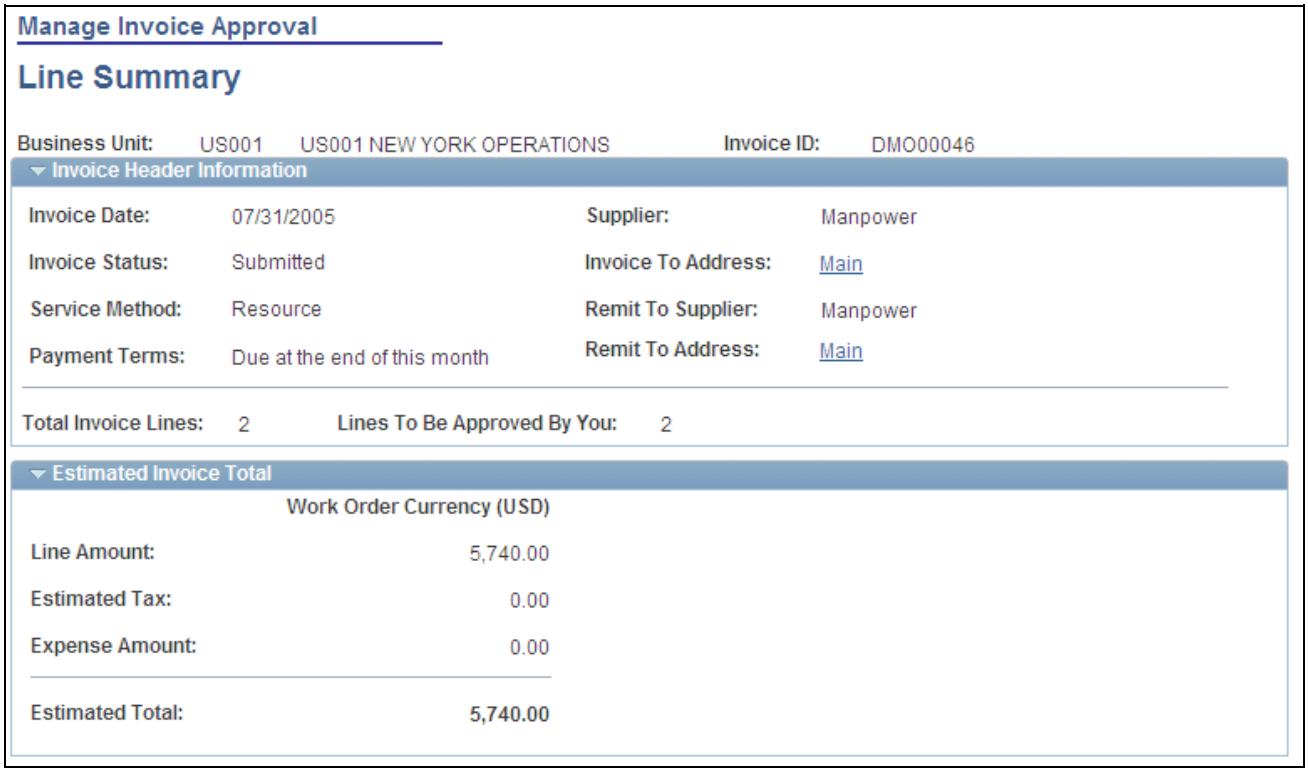
Note. The enterprise invoice approver can approve or reject only invoices that have the status of *Submitted To Enterprise* or *Approved by Supplier*. Otherwise, the approve and reject buttons are hidden.

Note. You receive an error message if the sum of the invoiced amount (listed on the work order) and the amount of the invoice is greater than the work order amount.

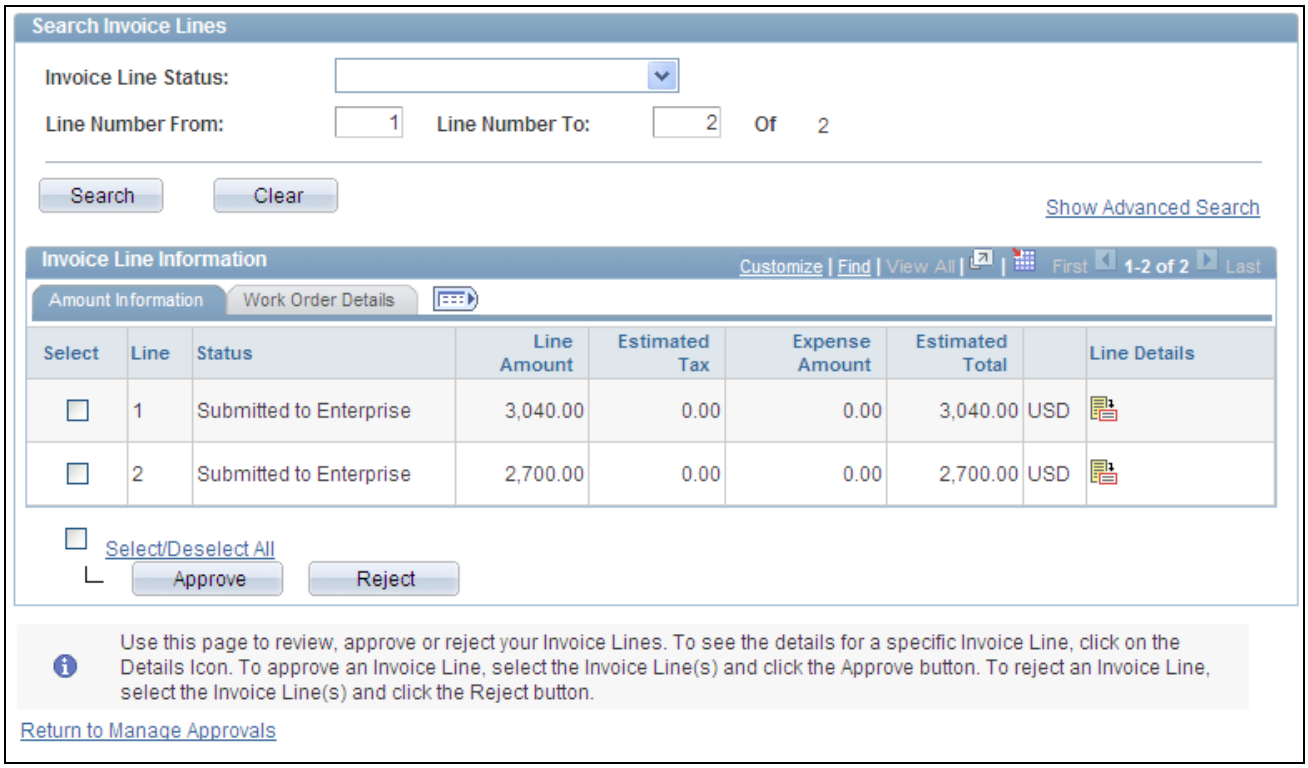
Estimated Total Displays the estimated total in either work-order or base currency.

Viewing Invoice Approval Line Summaries

Access the Manage Invoice Approval - Line Summary page (click the Invoice Approval Line Summary button on the Manage Invoice Approval page).



Manage Invoice Approval - Line Summary page (1 of 2)



Manage Invoice Approval - Line Summary page (2 of 2)

You can access this page when you sign in as a PeopleSoft Services Procurement approver and click the Edit button from the Invoice Roster.

Line Amount	Displays the total amount for the invoice line, excluding expenses and taxes.
MSP Fee(managed service provider fee)	Displays the amount paid to the MSP supplier for managing the service. This option appears and is included in the estimated invoice total only if MSP is installed and the supplier is an internal supplier. External suppliers have the MSP fee shown, but it is not included in the estimated invoice total.
VMS Fee(vendor-managed service fee)	Displays the amount paid to the VMS suppler for managing the service. This option appears and is included only in the estimated invoice total for VMS invoices.
Expense Amount	Displays the total expense amount in base or work order currency.
Estimated Tax	Includes VAT and sales tax, but not use tax.
Estimated Total	Displays the sum of the line amount, expense amount, MSP or VMS fee, and estimated tax.
Work Order Details	The Work Order Details tab in the Invoice Line Information grid shows the information related to the work order.

View Work Order	Click to view additional work order details.
Supplier	Displays the end supplier for invoices that are under-VMS-managed. This field is shown only when VMS applies on the work order.
Service Provider	Displays the service provider associated with the work order. This is displayed only for resource-based invoices.
Timesheet ID	Displays the time sheet associated with the invoice line. This is displayed only for resource-based invoices.
Period End Date	Displays the period end date for the time sheet associated with the invoice line. This is displayed only for resource-based invoices.
Expense Sheet ID	Displays the expense sheet associated with the invoice line if one exists.
Amount Information	The Amount Information tab in the Invoice Line Information grid shows the amounts for the invoice line.

Deliverables Based Invoice Approval

Progress Log ID	Displays the progress log ID associated with the invoice line.
Activity	This field appears for deliverables-based requisitions for rate-based and milestone-based activities.
Percent Complete	This field does not appear for milestone, fixed-amount, and rate-based progress logs.

See Also

Chapter 9, "Establishing and Managing the MSP Environment," page 245

Viewing Invoice Approval Line Detail

Access the Manage Invoice Approval - Line Detail page (click the Line Details button for an invoice on the Manage Invoice Approval - Line Summary page).

The information appearing on this page depends on the selected service method and is similar to the information appearing on the Invoice Line Detail page.

You can view invoice lines that you are authorized to approve, and enter comments before approving or rejecting invoice lines.

Timesheet ID, Expense Sheet ID,and **Progress Log ID**	Displays the time sheet, expense, or progress log associated with the invoice line. Click to view the time sheet, expense, or progress log details.

Period End Date Displays the period end date of the time sheet associated with the invoice line.

View Adjustments Click to view adjustments. When you make an adjustment to an invoice line amount, the system creates an entry for the Invoice Adjustment table. This provides a history of changes for invoices.

See Also

Chapter 22, "Managing Settlements," Viewing Invoice Line Details, page 580

Managing Invoice Approval for Suppliers

This section discusses how to:

- Approve supplier invoices.
- View invoice detail.
- Trigger worklist and email notifications.

Note. Many of the field definitions mentioned in the Approving Invoices section also apply to this section.

See Chapter 22, "Managing Settlements," Approving Invoices, page 588.

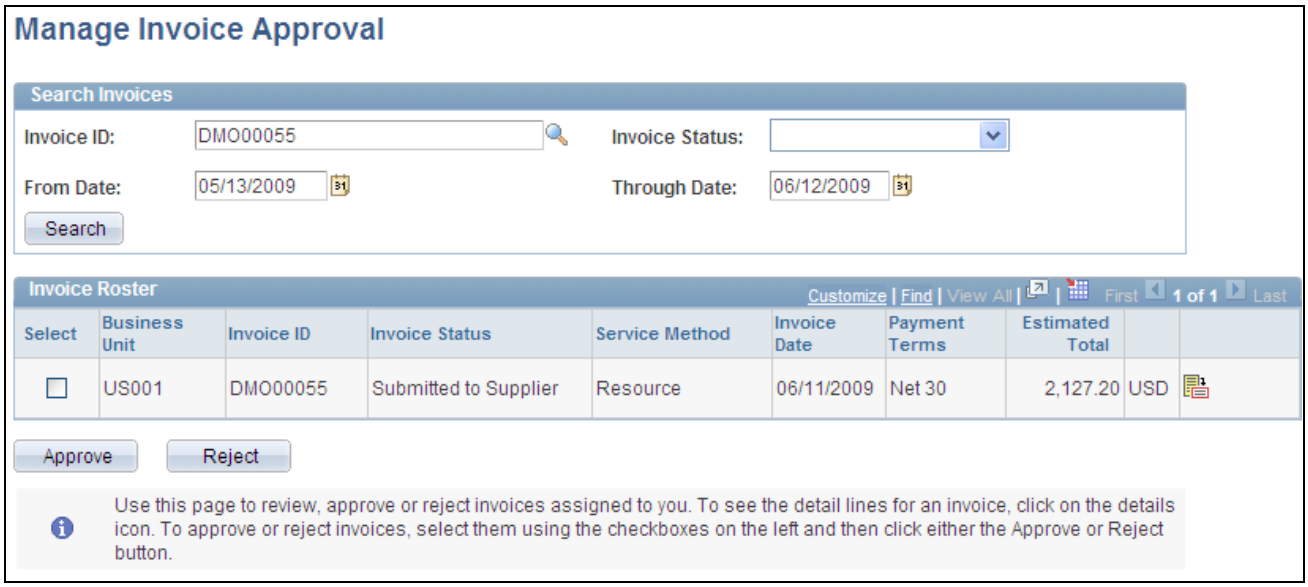
Pages Used to Manage Invoice Approval for Suppliers

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Invoice Approval - Line Summary	SPA_MG_SUP_INV_APR	Service Procurement, Approve Service Invoices (external)	Review, accept, or reject invoice approvals as a supplier invoice approver.
Manage Invoice Approval - Line Summary	SPA_SUP_INV_APR_LN	Click the Invoice Approval Line Summary button on the Manage Invoice Approval page.	View invoice lines that you are authorized to approve as a supplier invoice approver.

Page Name	Definition Name	Navigation	Usage
Work Order Details	SPF_WORDER_DETAIL	• Click the Work Order details tab on the Invoice Line Information grid of the Manage Invoice Approval - Line Summary page, and then select a linked work order. • Click a linked work order on the Manage Invoice Approval - Invoice Approval Line Detail page.	View details of the work order related to the invoice.
Invoice Approval Line Detail	SPA_SUP_INVAP_TIME	Click the Line Details button on the Manage Invoice Approval - Line Summary page.	View approvals for invoice line summaries, and enter comments before approving or rejecting the invoice line as a service provider.
Invoice Approval Line Detail	SPA_SUP_INVAP_PLOG	Click the Line Details button on the Manage Invoice Approval - Line Summary page.	View approvals for invoice line summaries, and enter comments before approving or rejecting the invoice line as a service provider.
Approve Timesheet	SPA_TIME_APPROVE	For resource-based invoices, click the linked time sheet on the Manage Invoice Approval - Line Detail page.	View time reports.
Services Expense Report - Services Expense Report Details	SPA_SHEET_LINES2	For either resource-based or deliverables-based invoices, click the linked expense on the Manage Invoice Approval - Line Detail page.	View expense reports.
Create Progress Log Submittal - Progress Log Summary	SPA_PLOG_LINES	For deliverables-based invoices, click the linked progress log on the Manage Invoice Approval - Line Detail page.	View time reports.

Approving Supplier Invoices

Access the external Manage Invoice Approval page (Service Procurement, Approve Service Invoices).



Manage Invoice Approval

Supplier users use this page to approve or reject invoices that have been submitted. Select an invoice to approve.

Viewing Invoice Detail

Access the Manage Invoice Approval - Line Summary page (click the Invoice Approval Line Summary button on the Manage Invoice Approval page).

Select the invoice line to approve.

Triggering Worklist and Email Notifications

The following status changes trigger a worklist entry and an email notification:

Note. For a user to receive an email, an email definition must be set up for the approval activity.

- The invoice manager receives a worklist entry and an email notification if the invoice status changes to *Rejected by Supplier or Rejected by Enterprise.*
- The invoice approver indicated on the work order receives a worklist entry and an email notification when the invoice status changes to *Submitted to Enterprise* or *Approved by Supplier*.
- The supplier invoice approver for each service provider receives a worklist entry and an email notification when an invoice is submitted to a supplier.

Chapter 23

Using Surveys in PeopleSoft Services Procurement

This chapter provides an overview of surveys in PeopleSoft Services Procurement and discusses how to:

- Set up surveys.
- Edit and submit work order surveys.
- View surveys.
- Respond to surveys.
- Review survey summary.

Understanding Surveys in PeopleSoft Services Procurement

PeopleSoft Services Procurement enables enterprise users to create performance surveys that are sent to recipients once their work orders are complete, canceled, or terminated. Enterprise users can create, edit, and send surveys to individual recipients, or distribute surveys to a list of recipients. Surveys are sent both automatically and manually, depending on the configuration of the work order environment. Once the survey is received and completed by the recipient, enterprise users can view survey responses.

Setting Up Surveys

To set up surveys, use the Setup Surveys (SP_SUR_DEFN) component. To define format and answer choices for work order survey questions, use the Response Type (SP_SUR_RESTYP) component. To set up surveys by service type, use the Survey by Service Type (SP_SURVEY_BY_SVTYP) component.

This section discusses how to:

- Define survey business unit option.
- Define service type attributes.
- Define role distribution lists.
- Define response types.
- Set up surveys.

- Set up survey - service types.
- Set up surveys by service type.

Pages Used to Define Surveys

Page Name	*Definition Name*	*Navigation*	*Usage*
Services Procurement Bus Unit (services procurement business unit)	BUS_UNIT_TBL_SP	• Set Up Financials/Supply Chain, Business Unit Related, Services Procurement, Services Procurement Definition • Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement options	Define PeopleSoft Services Procurement business units.
Work Order Settings	BUS_UNIT_TBL_SP_WO	Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement options Click the Work Order Settings tab.	Define work order alerts and settings.
Service Types	SPB_ROLE_TYPE	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Roles, Service Types • Services Procurement, Define Services Procurement, Service Setup, Service Type Setup, Service Types	Define service types options for surveys.

Page Name	*Definition Name*	*Navigation*	*Usage*
Role Distribution List	SP_DSTRLST	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Role Distribution Lists • Services Procurement, Define Services Procurement, Service Setup, Role Distribution Lists	Set up role distribution lists to use with performance surveys.
Response Type	SP_SUR_RESTYP	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Surveys, Response Type • Services Procurement, Define Services Procurement, Services Setup, Survey Setup, Response Types	Define formats and answer choices for work order survey questions.
Setup Survey	SP_SUR_DEFN	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Surveys, Survey Setup • Services Procurement, Define Services Procurement, Services Setup, Survey Setup, Survey Setup	Define titles, question sequence, and response types for work order surveys.
Survey Setup - Service Type	SP_SUR_DEFN_SVTYP	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Surveys, Setup Survey Select the Service Type tab. • Services Procurement, Define Services Procurement, Services Setup, Survey Setup, Survey Setup Select the Service Type tab.	View the service types related to the survey.

Page Name	*Definition Name*	*Navigation*	*Usage*
Survey by Service Type	SP_SURVEY_BY_SVTYP	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Surveys, Surveys by Service Type • Services Procurement, Define Services Procurement, Services Setup, Survey Setup, Surveys by Service Type	Associate service type with one or more surveys.

Defining Survey Business Unit Option

Access the Work Order Settings page (Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement options).

Enable Surveys Select to indicate that surveys may be used for work orders that are related to the specified business unit.

See Also

Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining PeopleSoft Services Procurement Business Units, page 37

Defining Service Type Attributes

Access the Service Types page (Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Roles, Service Types).

Require Survey by Default Select to indicate that surveys are mandatory for work orders that are associated with the specified service type. If you select this check box, surveys must be complete before the work order is finalized.

Note. You can change the status of a mandatory survey on a work order.

Automatically Send Survey Select to indicate that surveys will be automatically sent to recipients at the time the work order is terminated, closed, or canceled. If surveys are not sent automatically, then you must click the Send Survey to Recipients button on the work order.

Note. If a survey is automatic, it is sent to all recipients that are tied to the role action that is specified on the distribution list.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Service Types, page 90

Defining Role Distribution Lists

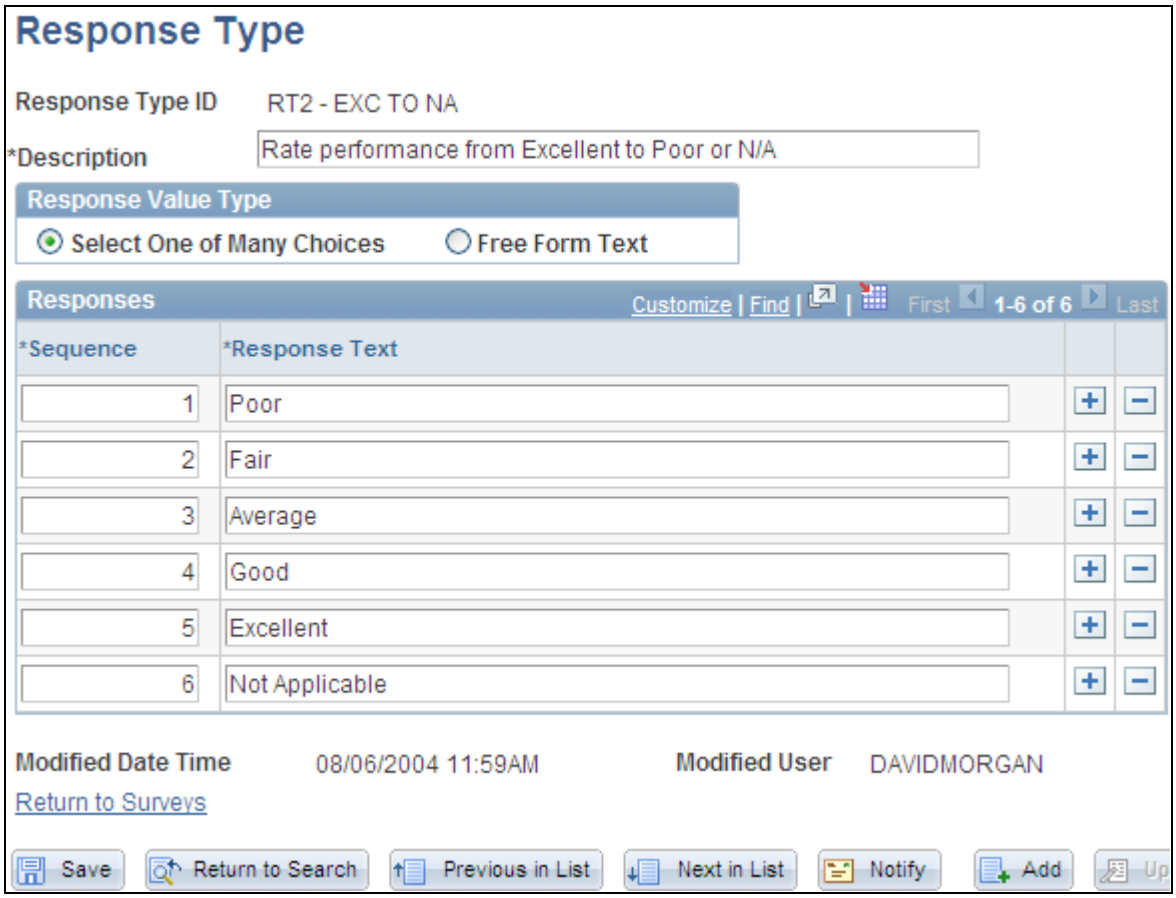
Access Role Distribution List page (Set Up Financials/Supply Chain, Product Related, Services Procurement, Role Distribution Lists).

Role Distribution List Indicates the name of the new distribution list.

Role Action Description Add role actions to the survey distribution list.

Defining Response Types

Access the Response Type page (Set Up Financials/Supply Chain, Product Related, Services Procurement, Surveys, Response Type).

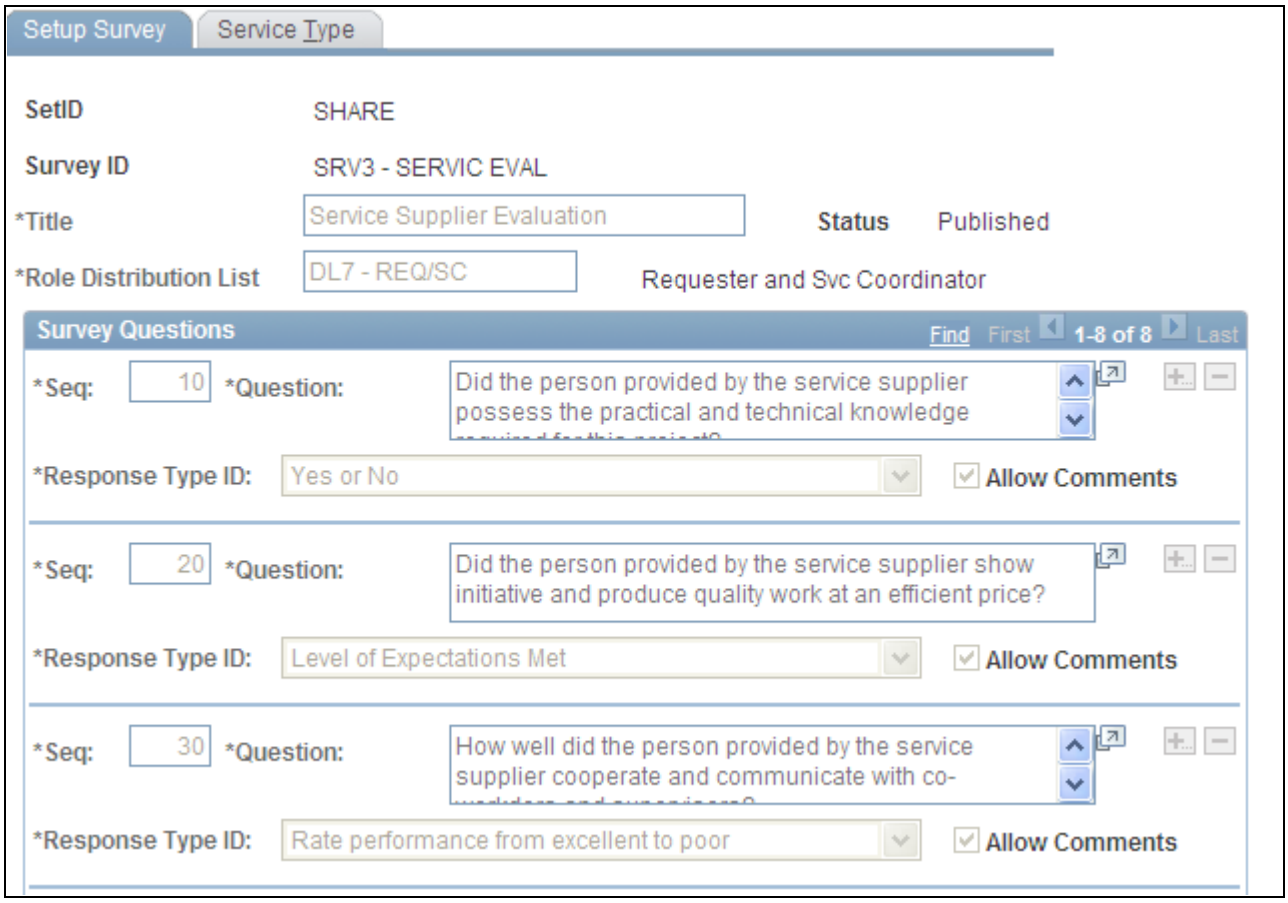


Response Type page

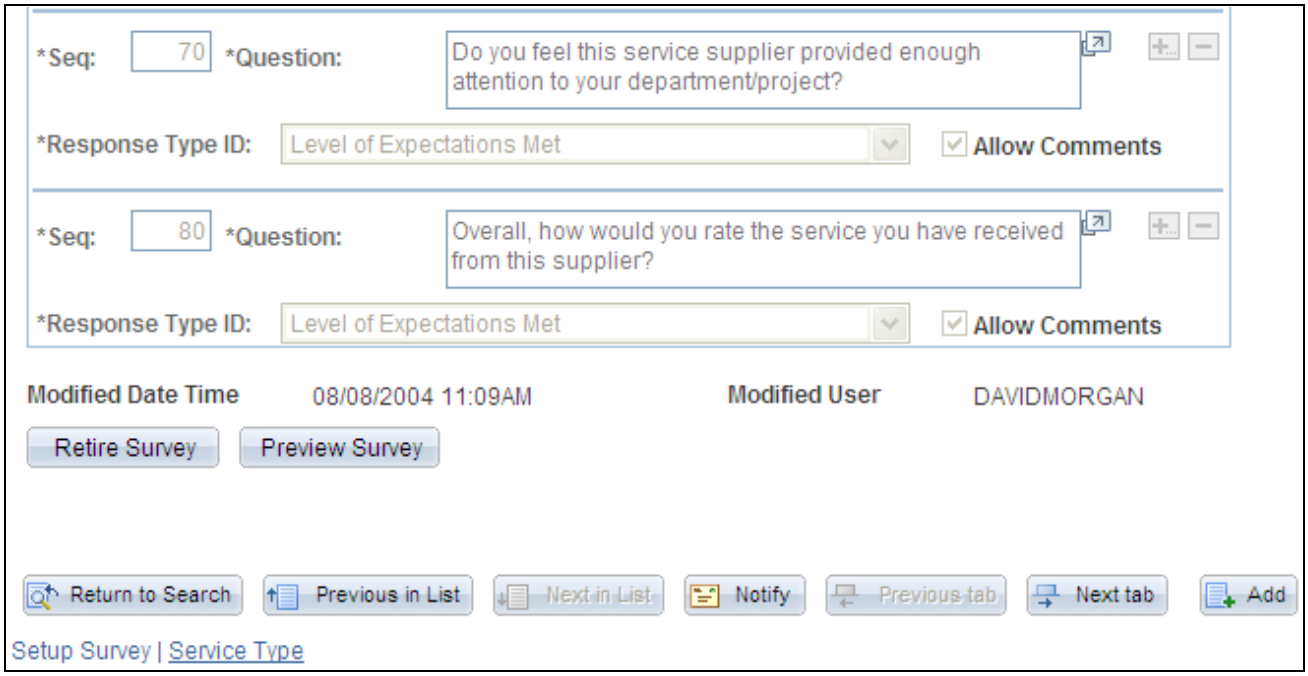
Response Type ID	Name of the response type. Response types are used to define a set of appropriate responses that can be associated to multiple questions within or across surveys.
Select One of Many Choices	Select to indicate that a question is limited to only one response.
Free Form Text	Select to indicate that a recipient can respond to a question as free-form text.
Sequence	Enter the order that responses appear to recipients. **Note.** This option is for single choice selections only.
Response Text	Enter the text for the response. The response texts for a response type are shown to survey recipients as the list of available answers to a survey question.

Setting Up Surveys

Access the Setup Survey page (Set Up Financials/Supply Chain, Product Related, Services Procurement, Surveys, Survey Setup).



Setup Survey page (1 of 2)



Setup Survey page (2 of 2)

Survey ID Displays the name of the survey.

Note. This field is keyed by SetID upon entering the page.

Title Enter the title of the survey.

Copy Click to copy an existing survey to a new survey. When you click this button, the system enables you to copy from a prior survey SetID and survey ID.

Note. This button only appears if you are creating a new survey.

Status View the predefined statues of a survey. Statuses include *Draft, Publish,* and *Retired.*

Draft: This is the initial status of a survey that is assigned when the survey is created and saved.

Published: The system changes the status from Draft to Publish once you select the Publish Survey button.

Note. Once you click the Publish Survey button, the Save Draft button is no longer available. You can only select published surveys as a work order survey.

Retired: This status indicates that the survey is retired, and the survey does not show up on the work order selection. The survey, however, is viewable in the survey results. It is possible to republish a retired survey.

Note. You cannot retire a survey that is the default for a service type unless you change the default first.

Sequence Determines the order in which the questions will be displayed to the survey recipients.

Role Distribution List Select a survey distribution list to associate with the survey.

Question Enter a survey question.

Response Type ID Select a response type to associate with the question on the survey.

Allow Comments Select to provide a comments text box to recipients for the survey question.

Retire Survey Click to retire a survey.

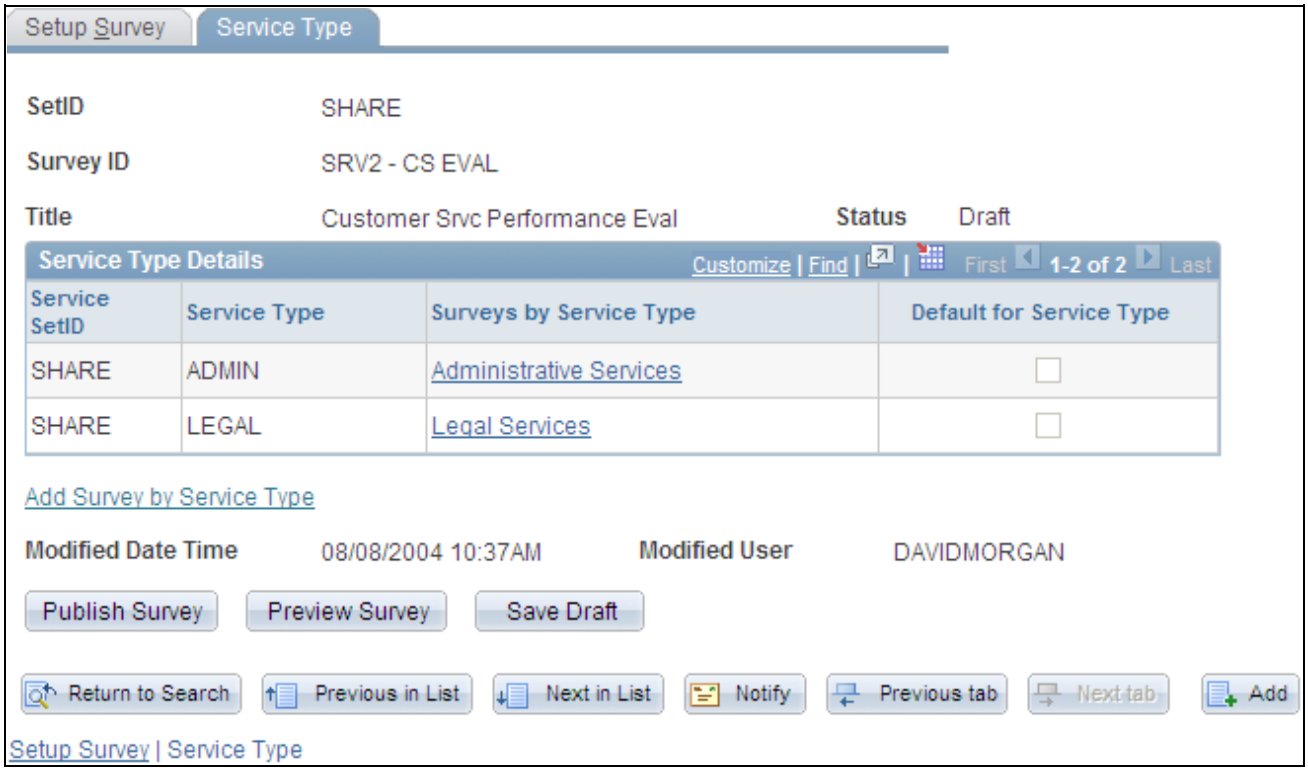
Note. When you retire the survey, the survey is removed from the work order selection.

It is possible to republish a retired survey.

Preview Survey Click to view a survey before it is published.

Setting Up Survey - Service Type

Access the Survey Setup - Service Type page (select the Service Type tab on the Setup Survey page).



Service Type page

Service SetID View the service SetID that is associated with the survey.

Service Type View the service types that are related to the survey.

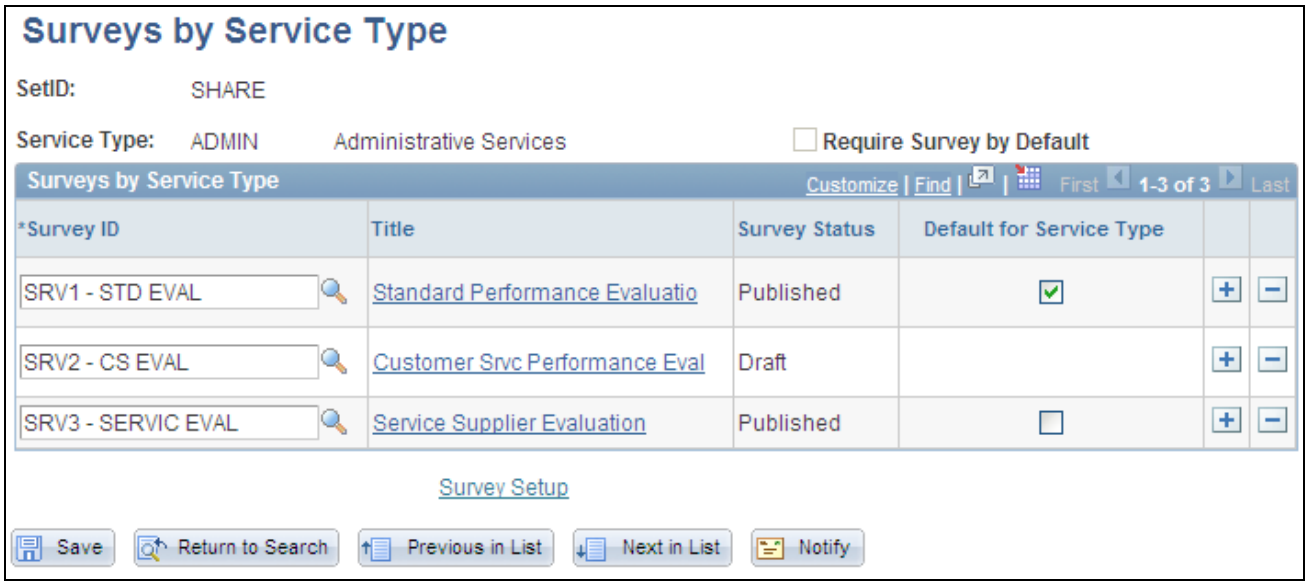
Surveys by Service Type Click to access the Survey by Service Type page for the specific Service Type. You can add and delete surveys for the service type, as well as select the default survey.

Default for Service Type Indicates that the survey is the default survey for the specified service type when a work order is created and requires a performance survey.

Add Survey by Service Type Click to access the Survey by Service Type page, where you can add and delete surveys for Service Types, as well as select the default survey for the service types. The system will prompt you for the Service Type.

Setting Up Surveys by Service Type

Access the Surveys by Service Type page (Set Up Financials/Supply Chain, Product Related, Services Procurement, Surveys, Surveys by Service Type).



Surveys by Service Type page

Survey ID Add and delete survey IDs that are associated to a service type.

Title Click to access the Setup Survey - Service Type page for the survey title that is visible. You can view all service types associated to the survey.

Survey Status View the status of the survey that is associated to a service type.

Default for Service Type Indicates whether a particular survey is the default survey for service type when the service type is entered on a work order and the business unit uses surveys. The default survey is used to initially populate the work order survey field.

Editing and Submitting Work Order Surveys

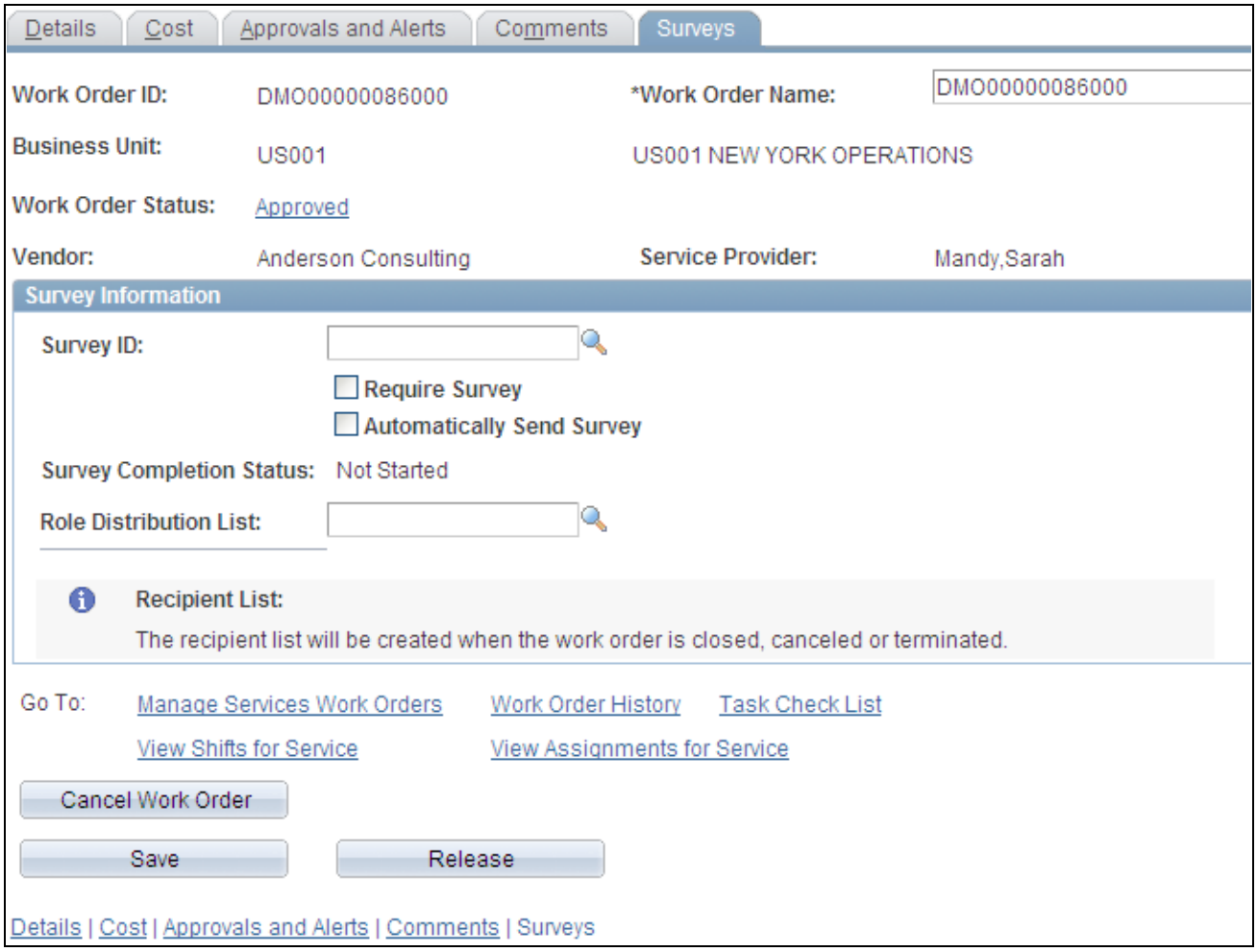
This section discusses how to edit and submit work order surveys.

Page Used to Edit and Submit Work Order Surveys

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Work Orders - Surveys	SPF_WO_SUR_USR	Services Procurement, Manage Services Work Order Select the Survey tab.	Include survey details and send surveys to the appropriate recipients.

Editing and Submitting Work Order Surveys

Access the Manage Work Orders - Surveys page (Services Procurement, Manage Services Work Order and click the Surveys tab).



Manage Work Order - Surveys page

Require Survey

Indicates that a survey is mandatory for the work order that is associated with the specified service type.

Note. This value defaults from the service type associated with the survey. You can modify this value before sending the survey.

Automatically Send Survey

Indicates that a survey will be automatically sent to a recipient at the time the work order is terminated, closed, or canceled. All recipients listed on the survey distribution list will receive notification.

Note. This value defaults from the service type associated with the survey. You can modify this value before sending the survey.

Distribution List Roles Work order-related role actions that are included in the distribution list that you select for the work order survey.

Note. After sending a survey, users may only cancel a survey. Use the + and - buttons to add a new survey recipient or remove a recipient if the survey has not yet been sent.

If a survey is mandatory, all recipients must complete and submit the survey before the work order can be finalized. The survey status changes to complete once the survey is submitted.

See Also

Chapter 18, "Managing Work Orders," page 413

Viewing Surveys

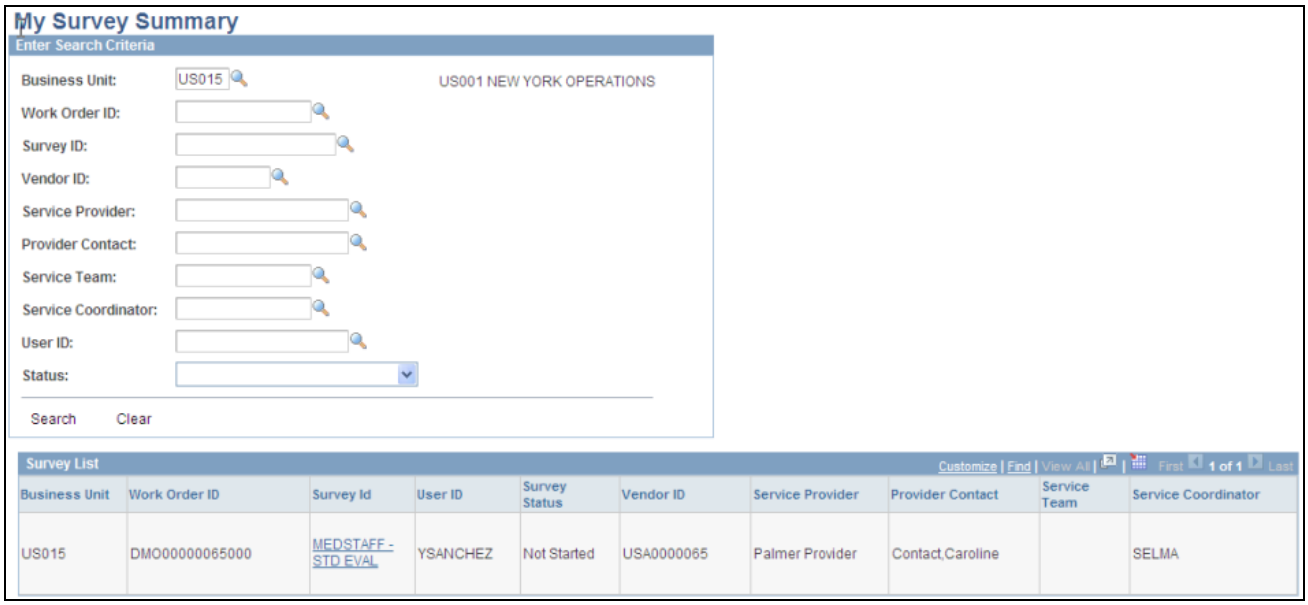
This section discusses how to view my survey summary.

Page Used to View Surveys

Page Name	*Definition Name*	*Navigation*	*Usage*
My Survey Summary	SP_SUR_FILL_ROSTER	Services Procurement, Respond/View Survey, My Survey Summary	Search for your work order performance surveys.

Viewing My Survey Summary

Access the My Survey Summary page (Services Procurement, Respond/View Survey, My Survey Summary).



My Survey Summary page

Enter a specific business unit, work order ID, survey ID, vendor ID, service provider, service contact, user ID (survey recipient), or status to restrict the surveys to only those that match. Or leave those fields blank to pick up all values. Click the Search button to return valid surveys that a user can complete for himself or on behalf of another user.

The Status field displays work order surveys that are not started, in progress, or canceled. Initially only those particular surveys that a user must complete as the survey recipient appear in the Survey List.

Survey ID Click to access the Respond to Survey page, where you can respond to and view the work order surveys.

Responding to Surveys

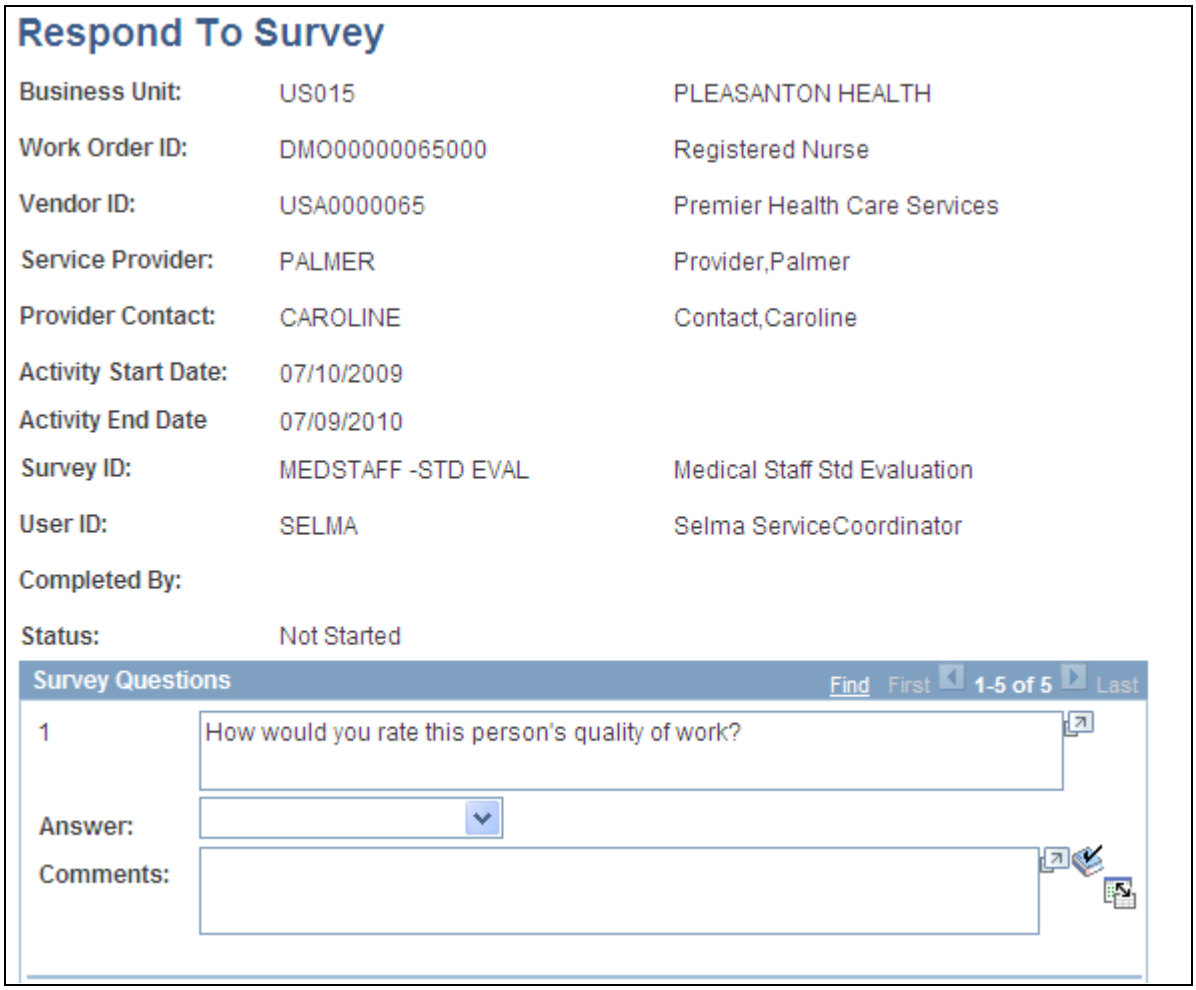
This section discusses how to respond to surveys.

Page Used to Respond to Surveys

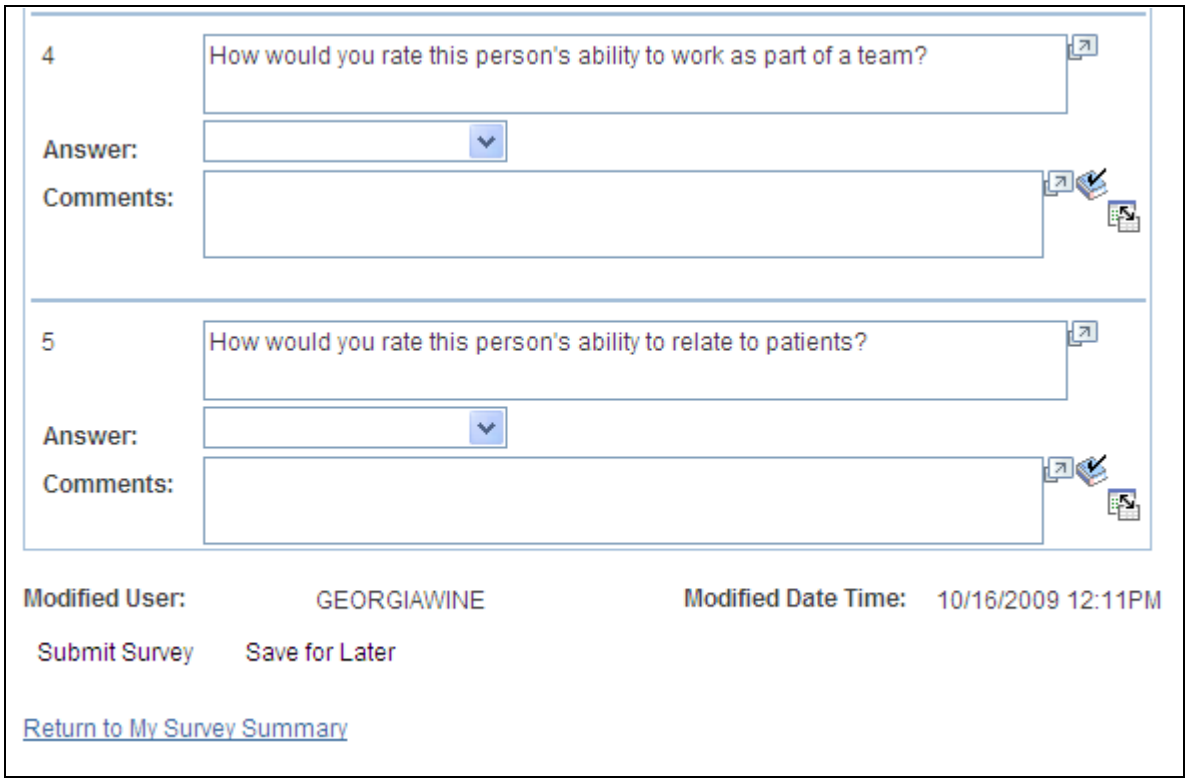
Page Name	*Definition Name*	*Navigation*	*Usage*
Respond To Survey	SP_SUR_FILL	• Services Procurement, Respond/View Survey, My Survey Summary Click the Search button to locate your surveys. • Worklist, Filter on Survey Routing Click Survey.	Respond to and review your work order surveys.

Responding to Surveys

Access the Respond To Survey page (Services Procurement, Respond/View Survey, My Survey Summary).



Respond to Survey page (1 of 2)



Respond to Survey page (2 of 2)

User ID Review the survey recipient user name.

Completed By Review name of the person that filled out the survey. This may differ from the recipient user name. The service coordinator, requester, and other service team members have the ability to respond to the survey on behalf of recipients. This field is blank if the survey is not complete.

Survey Question View the questions for the survey.

Answer Provide answers to the survey questions.

Submit Survey Click to submit the survey to the survey reviewer.

Note. This action disallows further changes to the survey, marks the survey as complete for the user, and removes the worklist entry.

Save for Later Click to save the survey. Once you save the survey, you can access and complete it at a later time.

Reviewing the Survey

This section discusses how to:

- Review the survey summary.
- Review the survey user response.

Pages Used to Review the Survey

Page Name	*Definition Name*	*Navigation*	*Usage*
Review Survey Summary	SP_SUR_REV_ROSTER	Services Procurement, Respond/View Survey, Review Survey Summary	Search for completed surveys to review.
Review Survey User Responses	SP_SUR_USR_RES	Services Procurement, Respond/View Survey, Review Survey Summary Click the Search button to locate survey responses.	Review work order evaluation summaries.

Reviewing the Survey Summary

Access the Review Survey Summary page (Services Procurement, Respond/View Survey, Review Survey Summary).

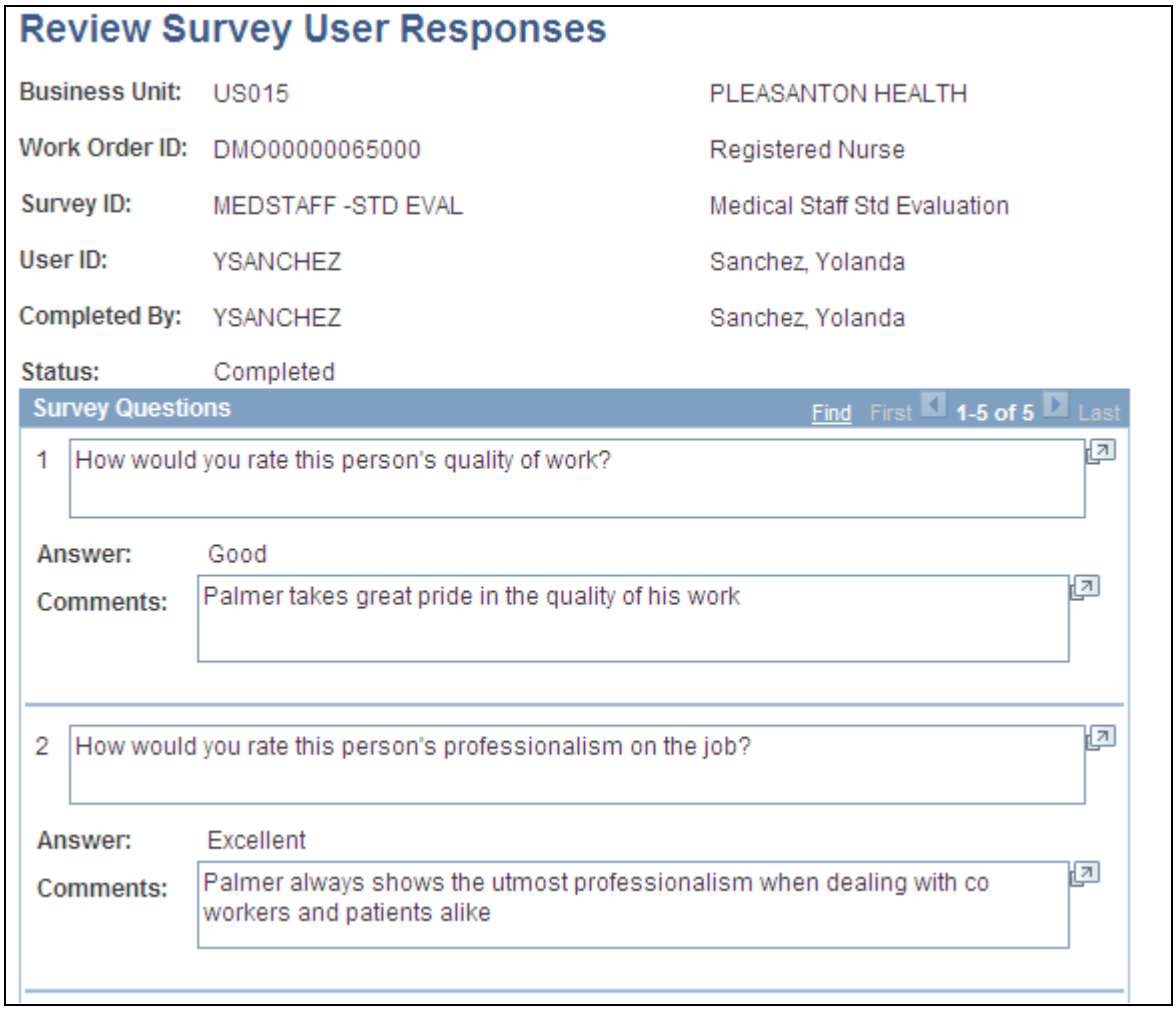
Enter a specific business unit, work order ID, survey ID, vendor ID, service provider, service contact, user ID (survey recipient), or status to restrict the surveys to only those that match. Or leave those fields blank to pick up all values. Click the Search button to return surveys that a user can complete for himself or on behalf of another user

The Status field displays work order surveys that are completed. Initially only those particular surveys that a user must complete as the survey recipient appear in the Survey List.

Survey ID Click to access the Review Survey User Responses page, where you can review completed work order evaluation summaries.

Reviewing the Survey User Response

Access the Review Survey User Responses page (Services Procurement, Respond/View Survey, Review Survey Summary).



Review Survey User Responses page

User ID	Review the name of the survey recipient.
Completed By	Review name of the recipient that filled out the survey. This may differ from the user name.
Status	View completed surveys. Use the My Survey Summary page to view surveys that are not started, in progress, or canceled.

Chapter 24

Interactive Reports in PeopleSoft Services Procurement

This chapter provides an overview of interactive reports and discusses how to:

- Populate the data mart.
- Analyze service provider rosters.
- Analyze service provider performance.
- Analyze service provider length of stay.
- Analyze expense life cycles.
- Analyze expense variance.
- Analyze supplier performance.
- Compare supplier rates.
- Analyze minority-owned suppliers.

Understanding Interactive Reports

PeopleSoft Services Procurement provides metrics on service providers, expenses, and suppliers to help you manage, measure, and analyze process and cost information across all aspects of the services procurement life cycle. The PeopleSoft system delivers standard analysis pages that cover the most common user requirements.

See Also

"PeopleSoft Services Procurement Preface," Common Elements Used In This PeopleBook, page xxv

Service Provider Metrics

Service provider metrics provide information on service providers broken out by department, manager, purchase order, and supplier:

- The service provider performance includes service provider rating information.

  Note. Service provider performance metrics are not broken out by purchase order.

- Service provider length of stay includes service provider continuous assignment information.

Expense Metrics

Expense metrics provide information on amounts committed, expended, and forecast on requisitions, work orders, and invoices:

- Expense life cycle includes expenses that are incurred throughout the various stages of the expense cycle, including entry, submission, approval, invoiced but not approved, invoiced and approved by supplier, and invoiced and approved.

  You can access expense life cycle data broken out by account, department, manager, supplier, and work order. For each dimension, you can also view the data by expense status.

- Expense variance includes forecast versus actual expense information.

  You can access expense variance data broken out by department, manager, purchase order, and supplier.

Supplier Metrics

Supplier metrics provide information on performance and rate comparisons by supplier and role:

- Supplier performance includes requisitions sourced, candidates submitted, requisitions filled, and positions filled.
- Supplier rate comparison includes rates that various suppliers charge for the same job role.
- Minority-owned suppliers include the number of bids that a minority-owned supplier receives and the number of work orders that are awarded to each of these suppliers.

  Minority-owned supplier metrics are analyzed by role.

Populating the Data Mart

You must populate the data mart before accessing the interactive report pages.

Note. If the data mart contains no data, a search page appears when you try to access an interactive reports page, but you can't progress from there.

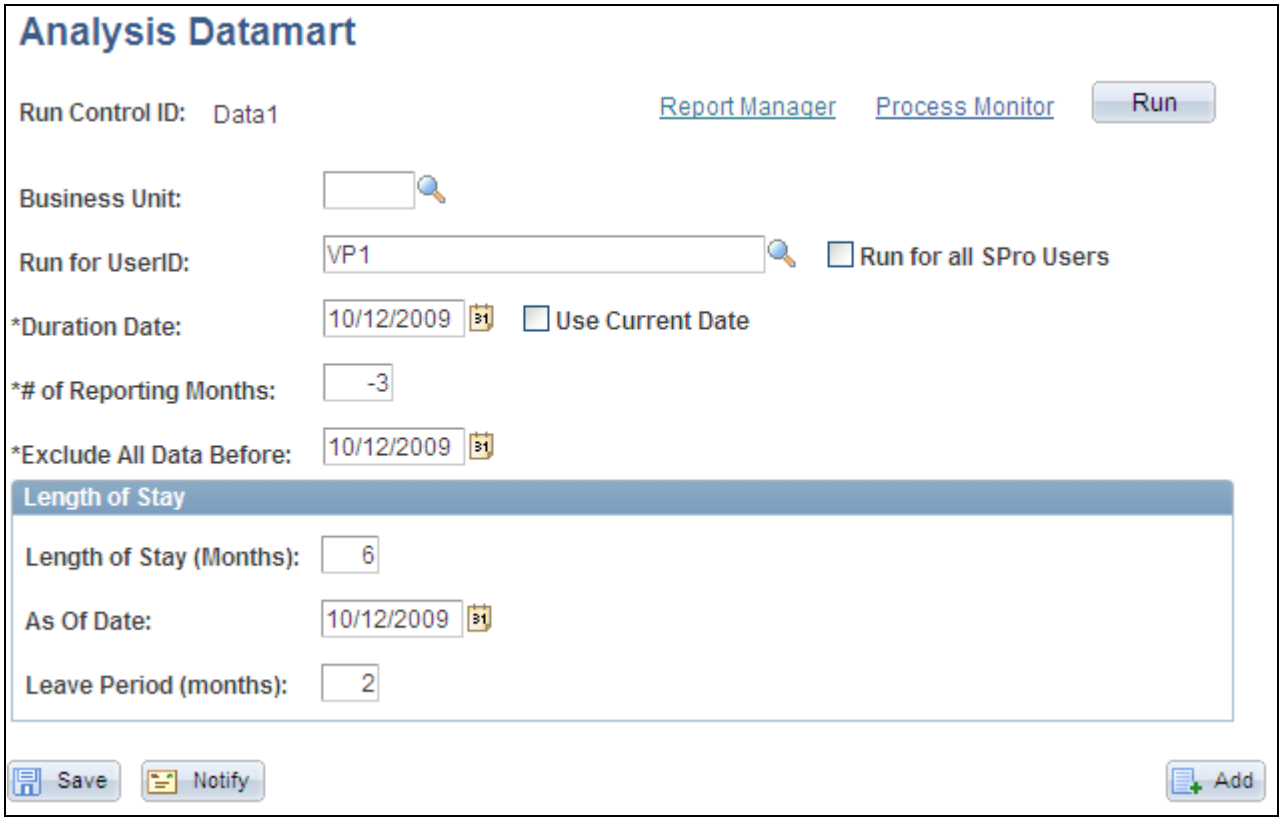
This section discusses how to populate the data mart.

Page Used to Populate the Data Mart

Page Name	*Definition Name*	*Navigation*	*Usage*
Analysis Datamart	RUN_SPR_DM	Services Procurement, Interactive Reports, Analysis Datamart Engine	Enter parameters that are used to run the PeopleSoft Application Engine that populates the data mart for analysis purposes.

Populating the Data Mart

Access the Analysis Datamart page (Services Procurement, Interactive Reports, Analysis Datamart Engine).



Analysis Datamart page

Business Unit Define the business unit for which you want to retrieve interactive report data.

Run for UserID and **Run for all Spro Users** The system retrieves data and populates the data mart with data that is specific to the selected user. Select the Run for all Spro Users check box to retrieve data for all users. The current user appears as the default value in the Run for UserID field.

Duration Date and **# of Reporting Months**

The system uses the duration date in conjunction with the number of reporting months to determine the time period that is used to retrieve the interactive report data. Enter the number of reporting months to define the number of months before or after the duration date for which you want to retrieve data.

Enter a positive value for number of reporting months to indicate the number of months starting from the duration date that are to be included in the process. Use a negative number to indicate the number of months prior to the duration date that are to be included in the process.

Note. The system does not retrieve dates prior to the entered start date regardless of the entered duration date and number of reporting months.

Use Current Date

Select to define duration date as the current system date. If this check box is selected, the system uses the number of reporting months that are relative to the current system date for each process instance.

Length of Stay

You enter data in the Length of Stay group box to define the parameters that are used to retrieve data for the length-of-stay interactive report pages.

Length of Stay (Months)

Enter the duration that a service provider can stay on assignment in accordance with the laws that govern the organization's labor practices. The system default is six months.

The system uses this value for analysis calculations, including determining the excess duration on the length-of-stay interactive report pages.

As Of Date

Select the date for which the service provider is considered active.

Leave Period (months)

Enter the maximum allowable period between the end of a project and the start of the next project. This is used to determine the service provider's start date.

Process Results

The Process Analysis Datamart Application Engine process (SPR_DATAMART) retrieves data from transaction tables and copies it to a fact table that is used during analysis.

Note. You can define a regular processing schedule by using the Process Scheduler page.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Analyzing Service Provider Rosters

You use the service provider roster to analyze total service provider count by department, manager, purchase order, or supplier.

This section discusses how to:

- View service provider roster summary information.
- View service provider roster details.

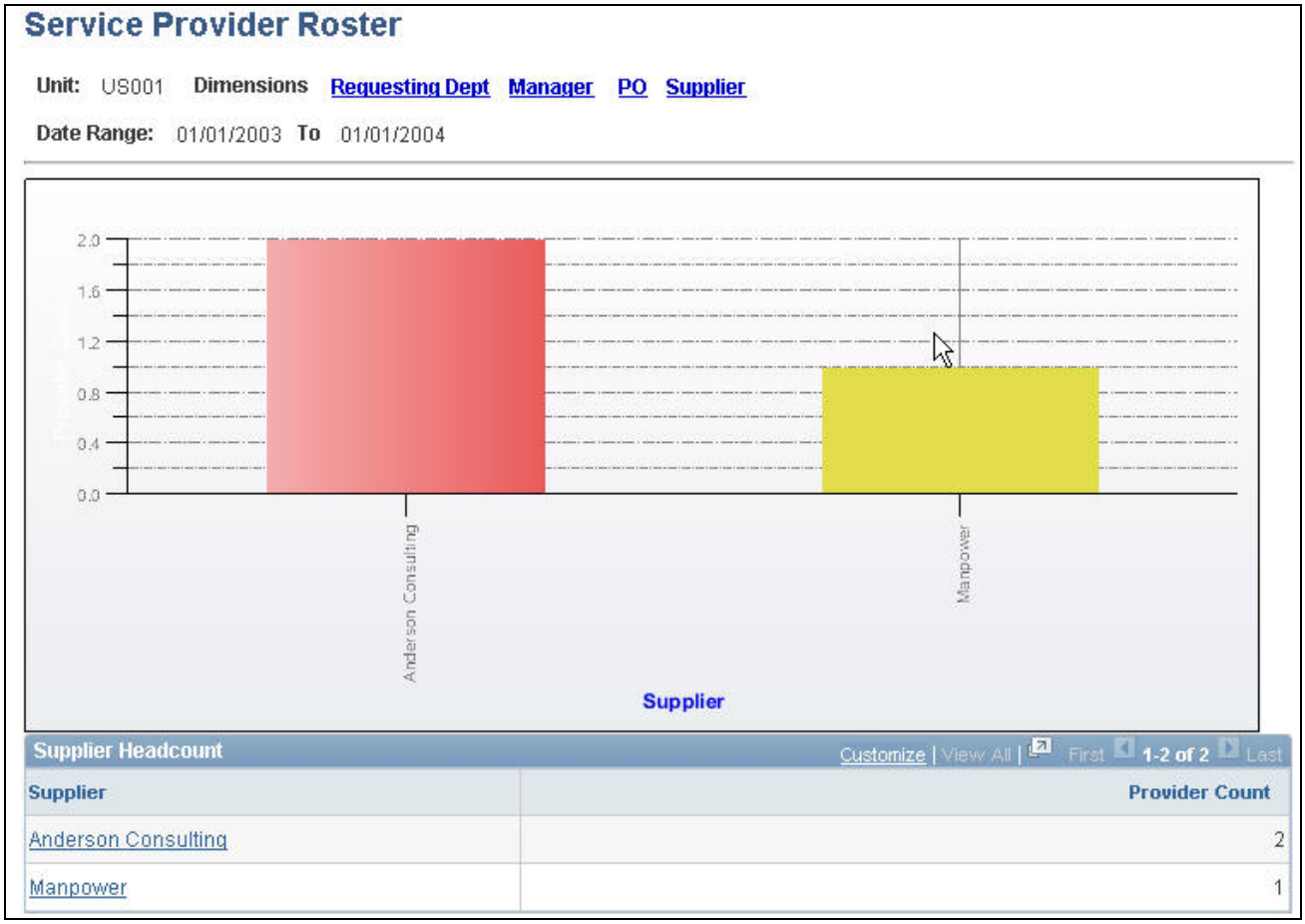
Note. This section uses the service provider roster department summary and details as an example. Similar functionality applies to the other dimensions (manager, purchase order, and supplier) and respective detail pages.

Pages Used to Analyze Service Provider Rosters

Page Name	*Definition Name*	*Navigation*	*Usage*
Service Provider Roster (summary)	SPR_CONROS_DASH_PG	Services Procurement, Interactive Reports, Provider Roster	View service provider roster summary graphs and data. Access detail pages.
Service Provider - Department Roster	SPR_CONSROSDR_PG	Click the Department Detail link on the Service Provider Roster page.	View the department details.
Service Provider Roster - Department Details	SPR_CONROS_DASH_PG	Click the Department link on the Service Provider Roster (summary) page for department.	View detailed service provider roster information for a selected department.
Service Provider Roster - Manager Details	SPR_CONROS_DASH_PG	Click the Manager link on the Service Provider Roster (summary) page for Manager.	View detail service provider roster information for a selected manager.
Service Provider Roster - Purchase Order Details	SPR_CONROS_DASH_PG	Click the PO link on the Service Provider Roster (summary) page for Purchase Order.	View detailed service provider roster information for a selected purchase order.
Service Provider Roster - Supplier Details	SPR_CONROS_DASH_PG	Click the Supplier link on the Service Provider Roster (summary) page for Supplier.	View detail service provider roster information for a selected supplier.

Viewing Service Provider Roster Summary Information

Access the Service Provider Roster (summary) page (Services Procurement, Interactive Reports, Provider Roster).



Service Provider Roster (summary) page

Department, Manager, Purchase Order, and **Supplier**	Click the link at the top of the page to have the system display the service provider roster graph and data by department, manager, purchase order, or supplier.
Provider Count	Displays for each department the total number of service providers.

Viewing Service Provider Roster Details

Access the Service Provider Roster - Department Details page (click the Department Detail link on the Service Provider Roster page).

Service Provider Roster

Unit: US001 **Supplier:** Anderson Consulting **Providers:** 2 **Date Range:** 01/01/2003 **To** 01/01/2004

Supplier Roster — Customize | View All | First 1-6 of 6

Service Providers | Dimensions

Service Provider	Requisition	View Requisition	Work Order	View Work Order	Start Date	End Date	Rate	PO Number	PO Amount	
Sarah Mandy	0000000108		DMO00000036000		01/01/2004	01/31/2004	34.00		5,984.00	USD
Sarah Mandy			DMO00000003000		08/12/2003	12/31/2003	45.00	0000000079	36,720.00	USD
Traci Nakamura			DMO00000004000		08/12/2003	12/02/2003	45.00	0000000072	29,160.00	USD
Sarah Mandy	0000000088		TST00000004000		08/05/2003	12/31/2003	44.00		0.00	USD
Sarah Mandy	0000000094		DMO00000001000		08/01/2003	05/31/2004	48.00	0000000067	159,734,568.00	USD
Traci Nakamura	0000000095		DMO00000005000		08/01/2003	05/31/2004	50.00	0000000069	180,839,120.00	USD

Service Provider Roster - Department Details page

The system displays detailed information about the service providers for the selected department.

Click to view the requisition or work order.

Dimensions

Select the Dimensions tab.

Service Provider Roster

Unit: US001 **Supplier:** Anderson Consulting **Providers:** 2 **Date Range:** 01/01/2003 **To** 01/01/2004

Supplier Roster — Customize | View All | First 1-6 of 6 Last

Service Providers | Dimensions

Service Provider	Requesting Department	Manager	Project Role
Sarah Mandy	10000	Carrie Conyers	PROJ MANAGER
Sarah Mandy	10000	Carrie Conyers	PROJ MANAGER
Traci Nakamura	10000	Carrie Conyers	PROJ MANAGER
Sarah Mandy	10000	Carrie Conyers	PROJ MANAGER
Sarah Mandy	10000	Carrie Conyers	PROJ MANAGER
Traci Nakamura	10000	Carrie Conyers	PROJ WORKER

Dimension page

In the example above, the system displays the procurement details for the department. Breakout by Manager, PO, or Supplier is also available

Analyzing Service Provider Performance

You use the service provider performance pages to analyze service provider performance by department, manager, or supplier.

Note. You use the service provider performance pages similar to the way that you use the service provider roster pages.

This section discusses how to view service provider performance summary information.

See Also

Chapter 24, "Interactive Reports in PeopleSoft Services Procurement," Analyzing Service Provider Rosters, page 621

Pages Used to Analyze Service Provider Performance

Page Name	*Definition Name*	*Navigation*	*Usage*
Service Provider Performance (summary)	SPR_CONPER_DASH_PG	Services Procurement, Interactive Reports, Provider Performance	View service provider performance summary graphs and data. Access detail pages.
Service Provider Performance - Department Details	SPR_CONSPERDR_PG	Click the Department link on the Service Provider Performance (summary) page for department.	View detailed service provider performance information for a selected department.
Service Provider Performance - Manager Details	SPR_CONSPERMR_PG	Click the Manager link on the Service Provider Performance (summary) page for manager.	View detailed service provider performance information for a selected manager.
Service Provider Performance - Supplier Details	SPR_CONSPERVR_PG	Click the Supplier link on the Service Provider Performance (summary) page for supplier.	View detailed service provider performance information for a selected supplier.

Viewing Service Provider Performance Summary Information

Access the Service Provider Performance (summary) page (Services Procurement, Interactive Reports, Provider Performance).

Rating (Avg) Displays the average approver rating for the total number of service providers for the business unit for each department, manager, or supplier, depending on the dimension that you view.

Analyzing Service Provider Length of Stay

You use the service provider length-of-stay pages to analyze how long service providers have been on assignment by department, manager, purchase order, or supplier.

This section discusses how to:

- View service provider length-of-stay summary information.
- View service provider length-of-stay details.

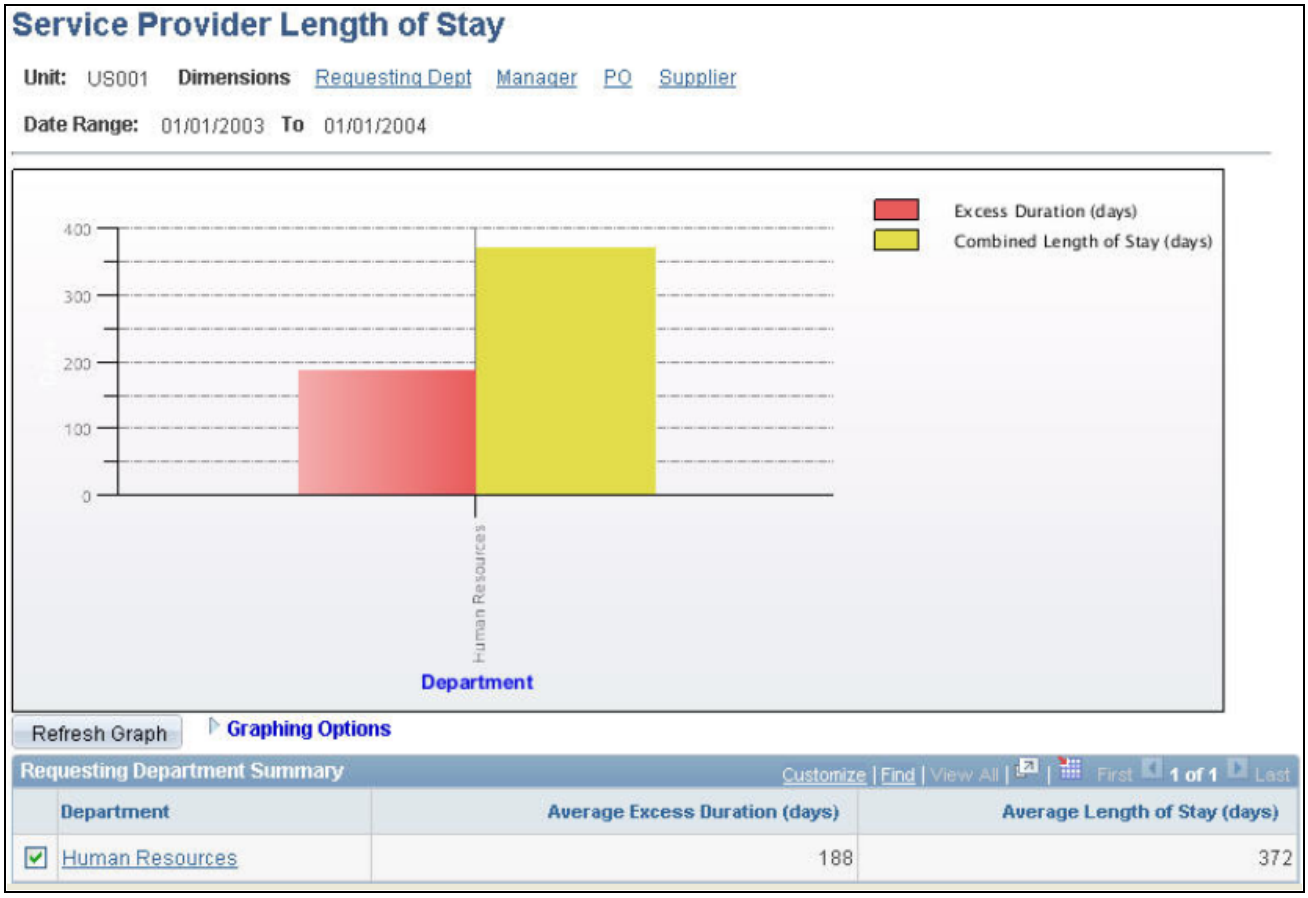
Note. This section uses the service provider length-of-stay manager summary and details as an example. Similar functionality applies to the other dimensions (department, purchase order, and supplier) and respective detail pages.

Pages Used to Analyze Service Provider Length of Stay

Page Name	*Definition Name*	*Navigation*	*Usage*
Service Provider Length of Stay (summary)	SPR_CONLOS_DASH_PG	Services Procurement, Interactive Reports, Provider Length of Stay	View service provider length-of-stay summary graphs and data. Access detail pages.
Service Provider Length of Stay - Department Details	SPR_CONSLOSDR_PG	Click the Department link on the Service Provider Length of Stay (summary) page for department.	View detailed service provider length-of-stay information for a selected department.
Service Provider Length of Stay - Manager Details	SPR_CONSLOSMR_PG	Click the Manager link on the Service Provider Length of Stay (summary) page for manager.	View detailed service provider length-of-stay information for a selected manager.
Service Provider Length of Stay - Purchase Order Details	SPR_CONSLOSOR_PG	Click the Purchase Order link on the Service Provider Length of Stay (summary) page for purchase order.	View detail service provider length-of-stay information for a selected purchase order.
Service Provider Length of Stay - Supplier Details	SPR_CONSLOSVR_PG	Click the Supplier link on the Service Provider Length of Stay (summary) page for supplier.	View detailed service provider length-of-stay information for a selected supplier.

Viewing Service Provider Length-of-Stay Summary Information

Access the Service Provider Length of Stay (summary) page (Services Procurement, Interactive Reports, Provider Length of Stay).



Service Provider Length of Stay (summary) page

Department, Manager, Purchase Order, and **Supplier**

Click the link at the top of the page to have the system display the service provider length-of-stay graph and data by department, manager, purchase order, or supplier.

Graphing Options

Select the options in the collapsible Graphing Options group box to define the parameters that are used for the graph. You must select parameters of like measurements. For example, you cannot select one measurement based on time and another based on count.

The system displays an error message if you select parameters of different measurement types.

Refresh Graph

Click to display the graph by using the selected graphing options and data points.

Note. Each row of data with a selected check box that appears on the bottom of the page is used as a data point for the graph.

By default, the system graphs the first five selected data rows that appear in the grid. You can select more than five rows, but the information appears smaller on the graph.

Average Excess Duration (days)

Displays the resulting calculation of the average projected end date less the start date for all service providers for the business unit by manager.

A positive value indicates the number of days in excess of the length of stay (in months) that is entered on the Analysis Datamart page, including Saturdays, Sundays, and holidays.

Note. The conversion from length of stay entered in months to excess duration appearing in days is based on using an average 30.4 days for a month.

Average Length of Stay (days)

Displays the resulting calculation of the average start date less end date for all service providers for the business unit by manager.

Viewing Service Provider Length-of-Stay Details

Access the Service Provider Length of Stay - Manager Details page (click the Manager link on the Service Provider Length of Stay (summary) page for manager).

The system displays detailed information about service providers for the manager.

Start Date

Displays the service provider's earliest start date, taking into account the leave period that is defined on the Analysis Datamart page.

A service provider's start date may not be his or her earliest start date with the organization. If the service provider has left the organization and returned after a period of time that exceeds the leave period that you define on the Analysis Datamart page, then the service provider's start date is the date of his or her return to the organization.

Projected End Date

Displays the start date plus the length of stay that is defined on the Analysis Datamart page.

End Date

Displays the end date that is associated with the work order ID.

Excess Duration (days) Displays the resulting calculation of projected end date less the start date for the service provider and work order.

A positive value indicates the number of days in excess of the length of stay that is entered on the Analysis Datamart page, including Saturdays, Sundays, and holidays.

Note. The conversion from length of stay entered in months to excess duration in days is based on an average 30.4 days for a month.

Combined Length of Stay (days) Displays the resulting calculation of start date less end date for all service providers for the service provider and work order.

Analyzing Expense Life Cycles

You use the expense life cycle pages to analyze expenses at each stage of the expense cycle and by account, department, manager, supplier, or work order.

This section provides an overview of expense life cycle statuses and discusses how to:

- View expense life cycle summary information.
- View expense life cycle-by-status summary information.
- View expense life cycle details by dimension and status.

Note. This section uses the expense life cycle work order summary and details as an example. Similar functionality applies to the other dimensions (account, department, manager, supplier, and work order) and respective detail pages.

Understanding Expense Life Cycle Statuses

The PeopleSoft system delivers expenses organized in these status categories:

Status	*Description*
Entered.	Timesheets and progress logs that are entered but not approved. These include timesheets and progress logs that are pending or denied status.
Submitted.	Timesheets and progress logs that are submitted by a service provider, but are not approved.
Approved.	Timesheets and progress logs that are approved but not invoiced.

Status	*Description*
Invoiced - Not Approved.	Timesheets and progress logs that are invoiced but pending approval. These include invoices that are generated, submitted to manager for approval, submitted to supplier for approval, rejected, rejected by supplier, and in adjusted status.
Invoiced - Supplier Approved.	Timesheets and progress logs that are invoiced and approved by the supplier.
Invoice Approved - Not Processed.	Timesheets and progress logs that are invoiced and approved, but not processed for billing.
Invoice Processed.	Invoices that are approved and processed.

The expense life cycle calculations include expenses from timesheets, progress logs, and invoices. For purposes of analysis, the PeopleSoft system delivers mapping for each expense life cycle status category as defined in these tables.

Timesheets

Timesheet mappings include:

Transaction Translate Value	*Transaction Translate Value Description*	*Expense Life Cycle Status*
ADJ	Adjusted	Approved
DEN	Denied	Entered
HLD	Hold	Submitted
PND	Pending	Entered
RAP	Approved	Approved
SUB	Submitted	Submitted

Note. Timesheet entries are mapped for analysis purposes at the detailed level.

Progress Logs

Progress log mappings include:

Transaction Translate Value	*Transaction Translate Value Description*	*Expense Life Cycle Status*
APR	Approved	Approved
DEN	Denied	Entered
HLD	Hold	Submitted
PND	Pending	Entered
SUB	Submitted	Submitted

Note. Progress log entries are mapped for analysis purposes at the detailed level.

Invoices

Invoice mappings include:

Invoice Status	*Expense Life Cycle Status*
Generated.	Invoiced - Not Approved.
Approved.	Invoice Approved - Not Processed.
Processed.	Invoice Processed.
Submitted.	Invoiced - Not Approved.
Rejected.	Invoiced - Not Approved.
Submitted to Supplier.	Invoiced - Not Approved.
Approved by Supplier.	Invoiced - Supplier Approved.
Rejected by Supplier.	Invoiced - Not Approved.

Invoice Status	*Expense Life Cycle Status*
Canceled.	Not applicable.
Adjusted.	Invoiced - Not Approved.

Note. Invoice entries are mapped for analysis purposes at the header level.

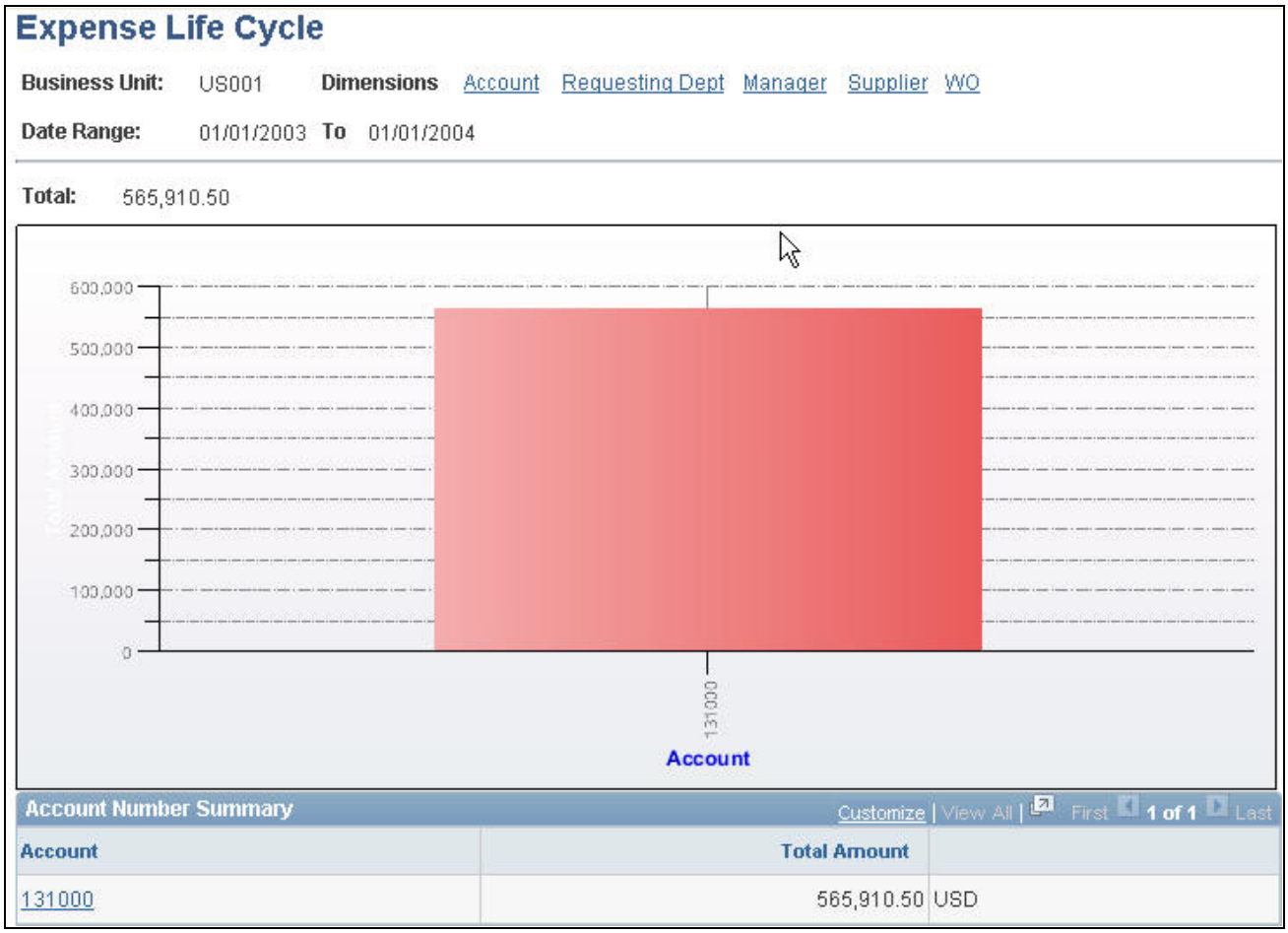
Pages Used to Analyze Expense Life Cycles

Page Name	*Definition Name*	*Navigation*	*Usage*
Expense Life Cycle (summary)	SPR_EXPCYC_DASH_PG	Services Procurement, Interactive Reports, Expense Life Cycle	View expense life cycle summary graphs and data. Access detail pages.
Expense Life Cycle - Account by Status	SPR_EXPCYCAM_PG	Click the Account link on the Expense Life Cycle (summary) page for account.	View expenses that are incurred by account and status.
Expense Life Cycle - Account Details	SPR_EXPCYCAR_PG	Click the Status link on the Expense Life Cycle - Account by Status page.	View account details of expenses that are incurred by selected status.
Expense Life Cycle - Department by Status	SPR_EXPCYCDM_PG	Click the Department link on the Expense Life Cycle (summary) page for department.	View expenses that are incurred by department and status.
Expense Life Cycle - Department Details	SPR_EXPCYCDR_PG	Click the Status link on the Expense Life Cycle - Department by Status page.	View department details of expenses that are incurred by selected status.
Expense Life Cycle - Manager by Status	SPR_EXPCYCMM_PG	Click the Manager link on the Expense Life Cycle (summary) page for manager.	View expenses that are incurred by manager and status.
Expense Life Cycle - Manager Details	SPR_EXPCYCMR_PG	Click the Status link on the Expense Life Cycle - Manager by Status page.	View manager details of expenses that are incurred by selected status.
Expense Life Cycle - Supplier by Status	SPR_EXPCYCVM_PG	Click the Supplier link on the Expense Life Cycle (summary) page for supplier.	View expenses that are incurred by supplier and status.

Page Name	*Definition Name*	*Navigation*	*Usage*
Expense Life Cycle - Supplier Details	SPR_EXPCYCVR_PG	Click the Status link on the Expense Life Cycle - Supplier by Status page.	View supplier details of expenses that are incurred by selected status.
Expense Life Cycle - Work Order by Status	SPR_EXPCYCWM_PG	Click the Work Order link on the Expense Life Cycle (summary) page for work order.	View expenses that are incurred by work order and status.
Expense Life Cycle - Work Order Details	SPR_EXPCYCWR_PG	Click the Status link on the Expense Life Cycle - Work Order by Status page.	View work order details of expenses that are incurred by selected status.

Viewing Expense Life Cycle Summary Information

Access the Expense Life Cycle (summary) page (Services Procurement, Interactive Reports, Expense Life Cycle).



Expense Life Cycle - Work Order by Status page

Total Amount Displays total costs from time, expenses, and progress logs, including those in the various processing stages, by work order.

Viewing Expense Life Cycle-by-Status Summary Information

Access the Expense Life Cycle - Work Order by Status page (click the Work Order link on the Expense Life Cycle (summary) page for work order). You can also access this page for account, department, manager, supplier, and work order.

Total Amount Displays the total costs from time, expenses, and progress logs for all work orders by status.

Viewing Expense Life Cycle Details by Dimension and Status

Access the Expense Life Cycle (details) page for a dimension and status.

The system displays detailed information about the work order for the selected status.

Analyzing Expense Variance

You use the expense variance pages to analyze expense variance by department, manager, purchase order, or supplier.

This section discusses how to:

- View expense variance summary information.
- View expense variance details.

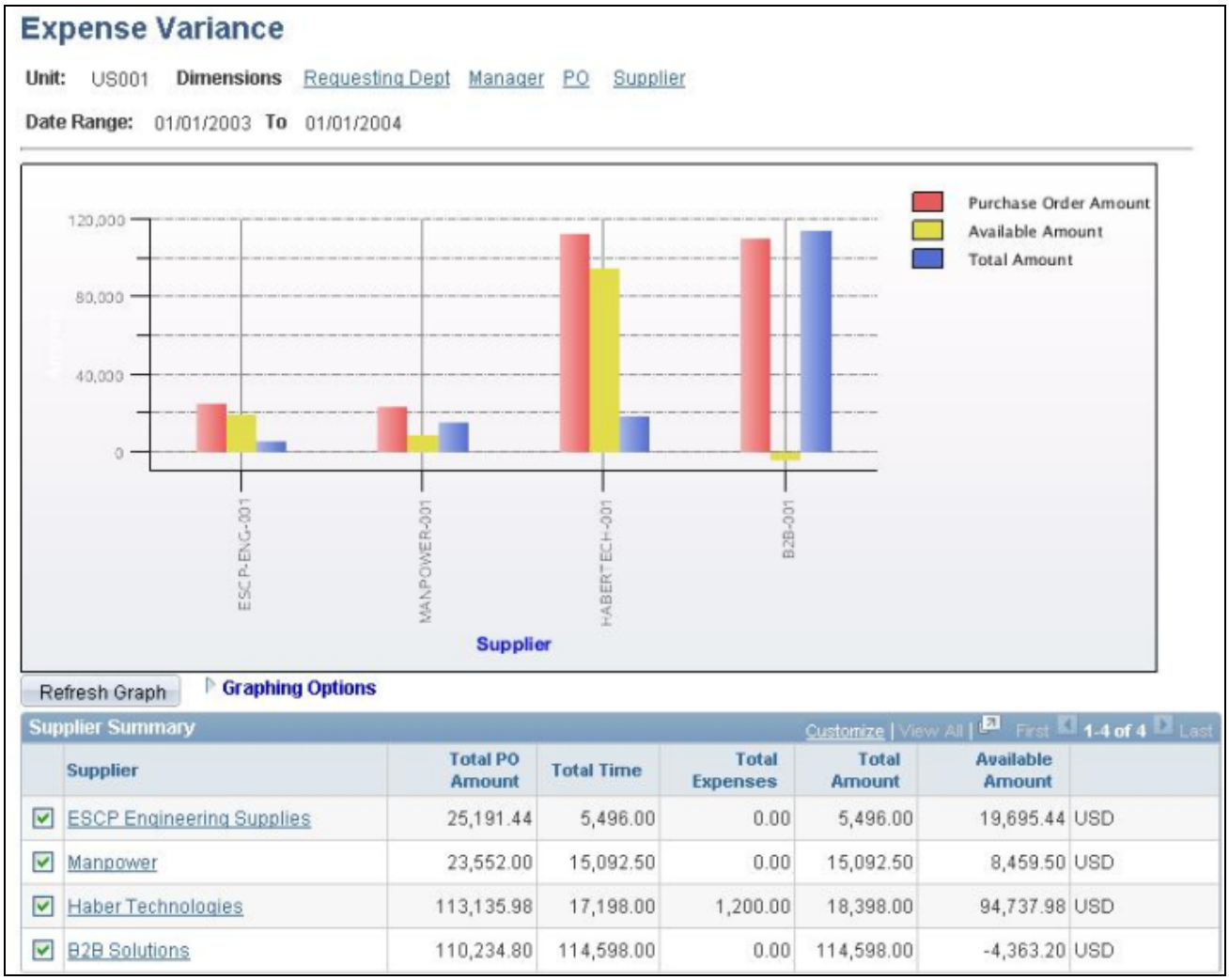
Pages Used to Analyze Expense Variance

Page Name	*Definition Name*	*Navigation*	*Usage*
Expense Variance (summary)	SPR_EXPVAR_DASH_PG	Services Procurement, Interactive Reports, Expense Variance	View expense variance summary graphs and data. Modify parameters that are used to create the graphs. Access detail pages.
Expense Variance - Department Details	SPR_EXPVARDR_PG	Click the Department link on the Expense Variance (summary) page for department.	View detailed expense variance information for a selected department.

Page Name	*Definition Name*	*Navigation*	*Usage*
Expense Variance - Manager Details	SPR_EXPVARMR_PG	Click the Manager link on the Expense Variance (summary) page for manager.	View detailed expense variance information for a selected manager.
Expense Variance - Purchase Order Details	SPR_EXPVAROR_PG	Click the Purchase Order link on the Expense Variance (summary) page for purchase order.	View detailed expense variance information for a selected purchase order.
Expense Variance - Supplier Details	SPR_EXPVARSR_PG	Click the Supplier link on the Expense Variance (summary) page for supplier.	View detailed expense variance information for a selected supplier.

Viewing Expense Variance Summary Information

Access the Expense Variance (summary) page (Services Procurement, Interactive Reports, Expense Variance).



Expense Variance (summary) page

Graphing Options

Select the options in the collapsible Graphing Options group box to define the parameters that are used for the graph. You must select parameters of like measurements. For example, you cannot select one measurement based on time and another based on count.

The system displays an error message if you select parameters that are of different measurement types.

Refresh Graph

Click to display the graph by using the selected graphing options and data points.

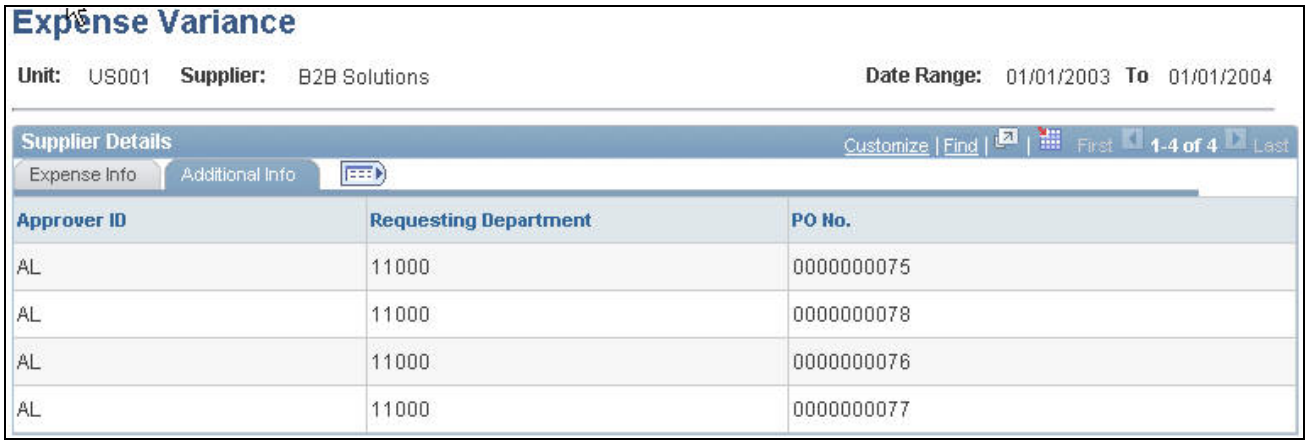
Note. Each row of data with a selected check box that appears on the bottom of the page is used as a data point for the graph.

By default, the system graphs the first five selected data rows that appear in the grid. You can select more than five rows, but the information appears smaller on the graph.

Variance Amount Displays the difference between the total purchase order amount and forecast total.

Viewing Expense Variance Details

Access the Expense Variance page (click the Department link on the Expense Variance (summary) page for department).



Expense Variance page: Additional Info tab

Click the Show All Columns button to view data from both the Expense Info (expense information) tab.

Analyzing Supplier Performance

You use the supplier performance pages to analyze supplier performance by supplier or role.

This section discusses how to:

- View supplier performance summary information.
- View supplier performance details.

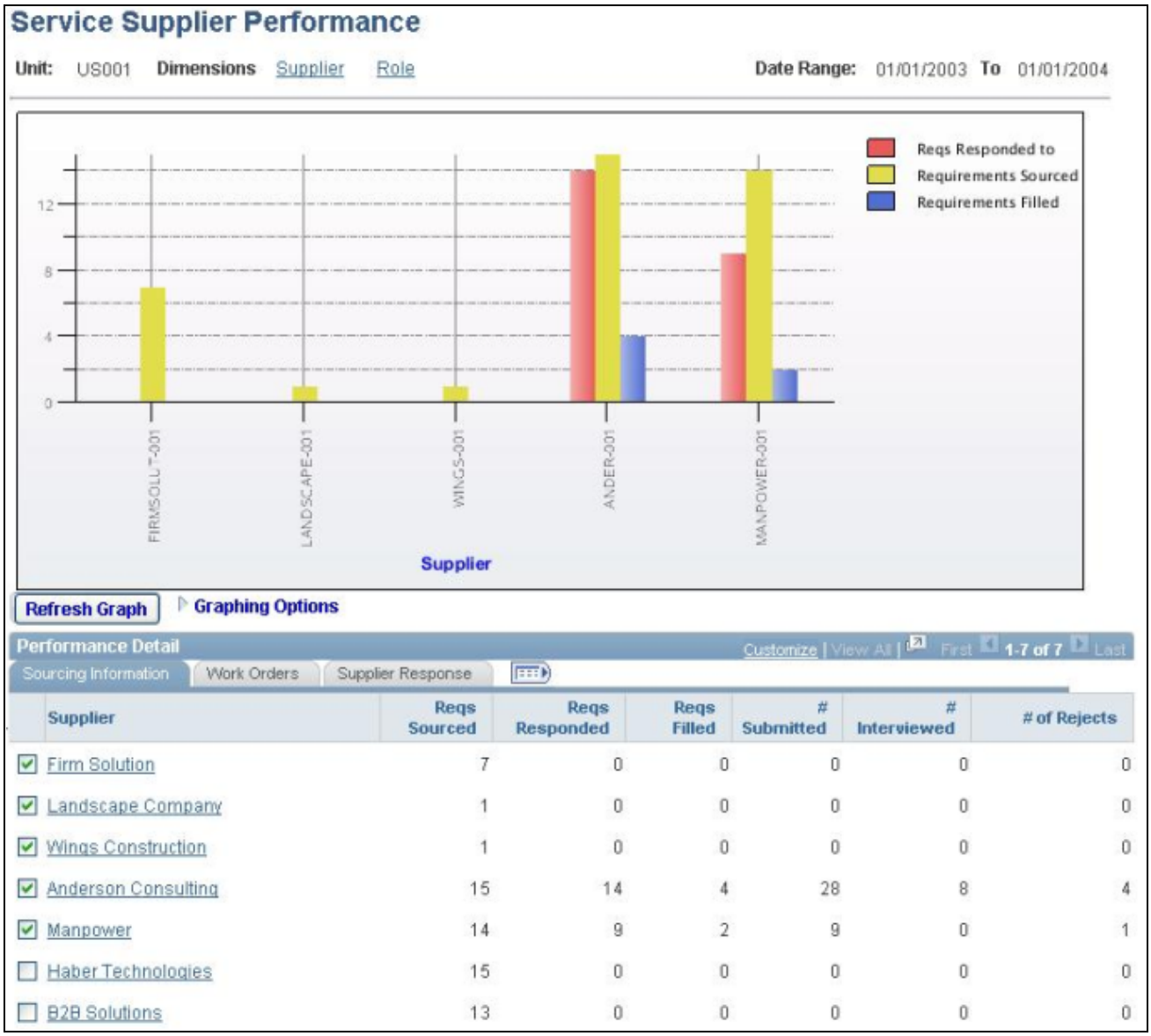
Note. This section uses the supplier performance supplier summary and details as an example. Similar functionality applies to the role summary and detail pages.

Pages Used to Analyze Supplier Performance

Page Name	*Definition Name*	*Navigation*	*Usage*
Service Supplier Performance (summary)	SPR_SUP_S_PG	Services Procurement, Interactive Reports, Supplier Performance	View supplier performance summary graphs and data. Modify parameters that are used to create the graphs. Access detail pages.
Service Supplier Performance - Supplier Details	SPR_SUP_SR_PG	Click the Supplier link on the Service Supplier Performance summary page.	View requisition and candidate statistics by supplier.
Service Supplier Performance - Role Details	SPR_SUP_RR_PG	Click the Role link on the Service Supplier Performance summary page for role.	View requisition and candidate statistics for this role.

Viewing Supplier Performance Summary Information

Access the Service Supplier Performance (summary) page (Services Procurement, Interactive Reports, Supplier Performance).



Supplier	Reqs Sourced	Reqs Responded	Reqs Filled	# Submitted	# Interviewed	# of Rejects
Firm Solution	7	0	0	0	0	0
Landscape Company	1	0	0	0	0	0
Wings Construction	1	0	0	0	0	0
Anderson Consulting	15	14	4	28	8	4
Manpower	14	9	2	9	0	1
Haber Technologies	15	0	0	0	0	0
B2B Solutions	13	0	0	0	0	0

Service Supplier Performance (summary) page

Graphing Options

Select the options in the collapsible Graphing Options group box to define the parameters that are used for the graph. You must select parameters of like measurements. For example, you cannot select one measurement based on amount, such as purchase order amount, and another based on count, such as work orders filled.

The system displays an error message if you select parameters of different measurement types.

Refresh Graph

Click to display the graph by using the selected graphing options and data points.

Note. Each row of data with a selected check box that appears on the bottom of the page is used as a data point for the graph.

By default, the system graphs the first five selected data rows that appear in the grid. You can select more than five rows, but the information appears smaller on the graph.

Work Orders

Select the Work Orders tab.

View work order summary information for each supplier for the business unit.

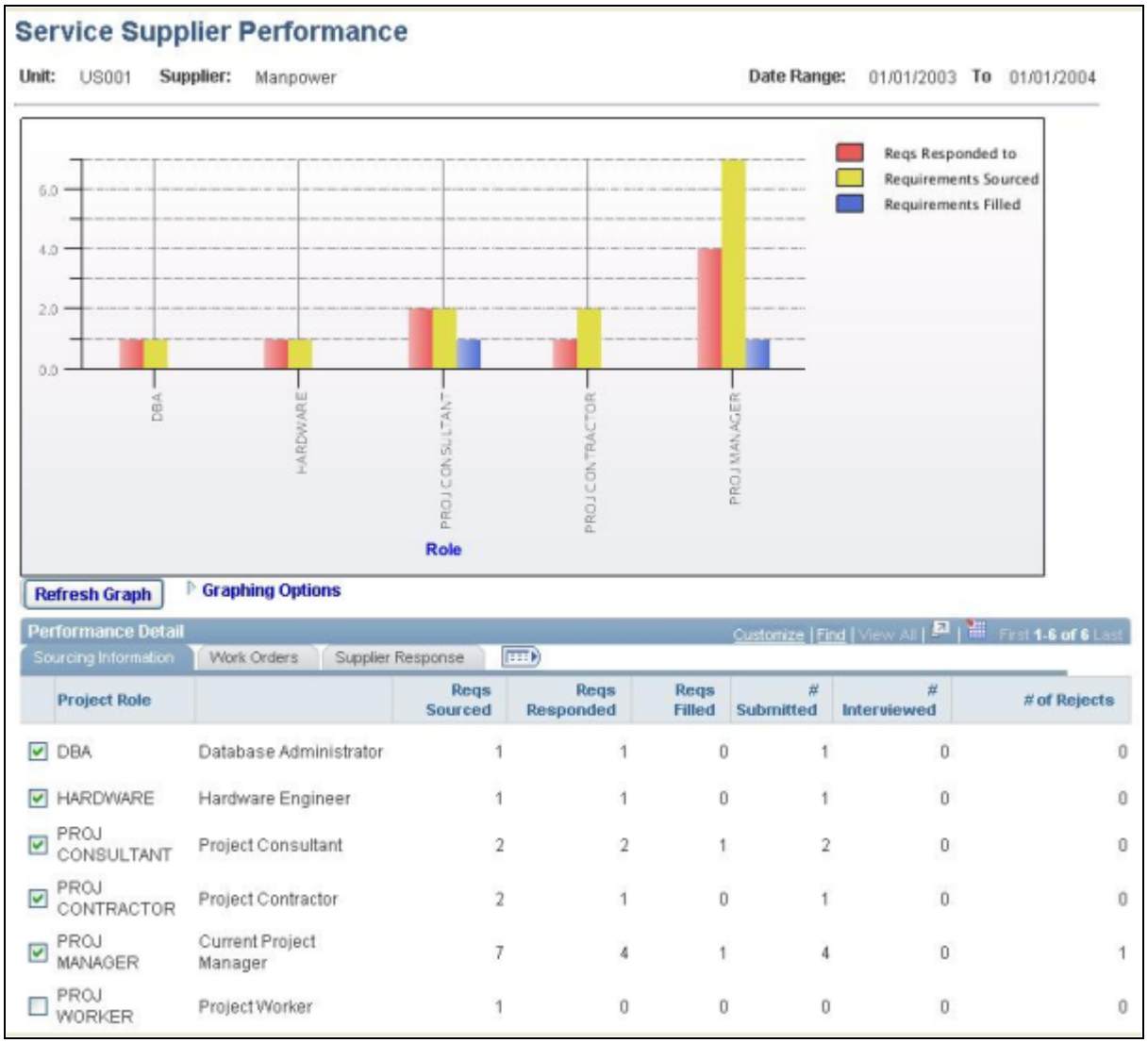
Supplier Response

Select the Supplier Response tab.

View supplier response time summary information by supplier for the business unit.

Viewing Supplier Performance Details

Access the Service Supplier Performance - Supplier Details page (click the Supplier link on the Service Supplier Performance summary page).



Project Role		Reqs Sourced	Reqs Responded	Reqs Filled	# Submitted	# Interviewed	# of Rejects
DBA	Database Administrator	1	1	0	1	0	0
HARDWARE	Hardware Engineer	1	1	0	1	0	0
PROJ CONSULTANT	Project Consultant	2	2	1	2	0	0
PROJ CONTRACTOR	Project Contractor	2	1	0	1	0	0
PROJ MANAGER	Current Project Manager	7	4	1	4	0	1
PROJ WORKER	Project Worker	1	0	0	0	0	0

Service Supplier Performance - Supplier Details page

Sourcing Information

View requisition details by project role for a selected supplier.

Work Orders

Select the Work Orders tab.

View work order details by project role for a selected supplier.

Supplier Response

Select the Supplier Response tab.

View supplier response time details by project role for a selected supplier.

Comparing Supplier Rates

You use the supplier rate comparison pages to analyze average rates of suppliers by supplier or role.

Note. You use the supplier rate comparison pages similar to how you use the expense life cycle pages.

This section lists the pages used to compare supplier rates.

See Also

Chapter 24, "Interactive Reports in PeopleSoft Services Procurement," Analyzing Expense Life Cycles, page 628

Pages Used to Compare Supplier Rates

Page Name	*Definition Name*	*Navigation*	*Usage*
Supplier Rate Comparison (summary)	SPR_SRTCMP_DASH_PG	Services Procurement, Interactive Reports, Supplier Rate Comparison	View supplier rate comparison summary graphs and data. Access detail pages.
Supplier Rate Comparison - Supplier Details	SPR_SRTCMPSM_PG	Click the Supplier link on the Supplier Comparison summary page for suppliers.	View average rates by role for this supplier.
Supplier Rate Comparison - Role Details	SPR_SRTCMPRM_PG	Click the Role link on the Supplier Comparison summary page for roles.	View average rates by supplier for this role.
Supplier Rate Comparison - Service Providers for Supplier and Role	SPR_SRTCMPSD_PG	Click the Current Project Manager link on the Supplier Rate Comparison - Role Details page.	View service providers by supplier for a selected role.
Supplier Rate Comparison - Service Providers for Role and Supplier	SPR_SRTCMPRD_PG	Click the Supplier link on the Supplier Rate Comparison - Supplier Details page.	View service providers by role for a selected supplier.

Analyzing Minority-Owned Suppliers

The Minority Owned Suppliers page shows a summary of the number of bids that minority-owned suppliers receive and the number of work orders that are awarded to each category for the business unit.

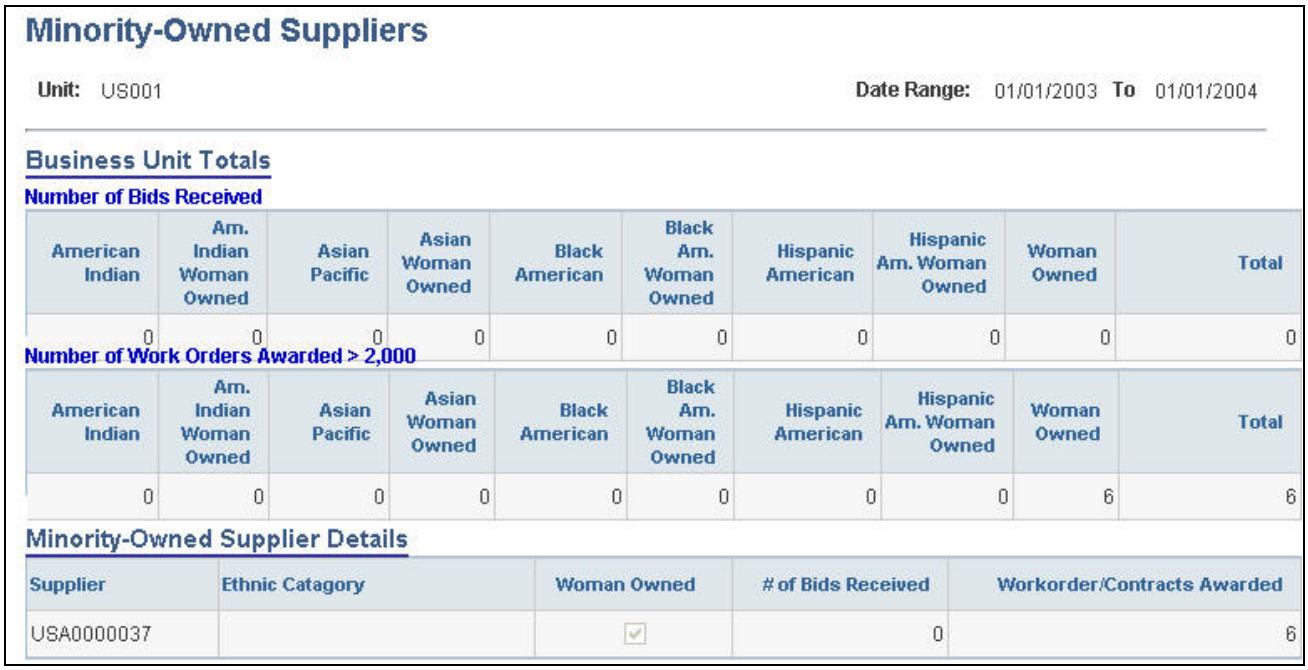
This section discusses how to view minority-owned supplier summary information.

Page Used to Analyze Minority-Owned Suppliers

Page Name	*Definition Name*	*Navigation*	*Usage*
Minority-Owned Suppliers	SPR_MOS_PG	Services Procurement, Interactive Reports, Minority-Owned Suppliers	View the number of bids that are received and the number of work orders that are awarded for each minority-owned supplier.

Viewing Minority-Owned Supplier Summary Information

Access the Minority-Owned Suppliers page (Services Procurement, Interactive Reports, Minority-Owned Suppliers).



Minority-Owned Suppliers

Unit: US001 Date Range: 01/01/2003 To 01/01/2004

Business Unit Totals

Number of Bids Received

American Indian	Am. Indian Woman Owned	Asian Pacific	Asian Woman Owned	Black American	Black Am. Woman Owned	Hispanic American	Hispanic Am. Woman Owned	Woman Owned	Total
0	0	0	0	0	0	0	0	0	0

Number of Work Orders Awarded > 2,000

American Indian	Am. Indian Woman Owned	Asian Pacific	Asian Woman Owned	Black American	Black Am. Woman Owned	Hispanic American	Hispanic Am. Woman Owned	Woman Owned	Total
0	0	0	0	0	0	0	0	6	6

Minority-Owned Supplier Details

Supplier	Ethnic Catagory	Woman Owned	# of Bids Received	Workorder/Contracts Awarded
USA0000037		☑	0	6

Minority-Owned Suppliers page

Chapter 25

Supplier Scoring for PeopleSoft Services Procurement

This chapter provides an overview of supplier scoring for PeopleSoft Services Procurement and discusses how to:

- Set up performance level codes.
- Set up supplier scoring rules.
- Set up supplier scoring parameters.
- View PeopleSoft Services Procurement pages that use supplier scoring.

Understanding Supplier Scoring for PeopleSoft Services Procurement

Supplier scoring for PeopleSoft Services Procurement provides you with supplier metrics to help score, analyze, and compare suppliers across the requisition life cycle. Use supplier scoring to determine the best suppliers that meet the requisition requirements. We provide standard scoring setup pages to assist you in creating the own enterprise metrics for scoring suppliers.

Use supplier scoring to:

- Define performance level codes to determine the various levels at which suppliers perform.
- Analyze and compare performance metrics and performance level codes across the requisition life cycle.
- Source requisitions to qualified suppliers that meet the scoring requirements.
- Define supplier scoring parameters, such as rule score, start date, and duration start date.

  Use the Service Procurement Business Unit page to schedule time intervals for retrieving score data from the PeopleSoft Services Procurement database.

The Supplier Scoring Process

This is the basic task flow of the service scoring process:

1. Access the Supplier Performance Level Codes page to set up supplier performance level codes.
2. Use the Supplier Scoring Rules page to set up supplier scoring rules.

3. Access the Services Procurement Business Units page to set up supplier scoring parameters.

   You can also use this page to identify the scoring rule, define a specific period of time for gathering scoring data, and calculate supplier scores.

4. Use supplier scoring logic within the Scoring component.

Common Elements Used in This Chapter

Performance Level Codes

Determines various levels at which suppliers perform. Use the Performance Level Codes page to create specific performance codes to help evaluate suppliers' performance. Each performance code has four levels that are used to determine a range for evaluation. For example, you might create the performance level code RESPONSE_TIME to determine the average response time of suppliers. Or, you might create performance level CAND_SUB_PER_REQ to determine the average number of candidates that suppliers submit per requisition. The performance range for the CAND_SUB_PER_REQ level code might include the following levels: Level One = 2, Level Two = 4, Level Three = 6, and Level Four = 8, to represent the number of candidates that are submitted per requisition.

Note. Reverse performance levels as needed.

The combined level amount can equal more than 100 percent.

Supplier Scoring Rules

User-defined rule that calculates supplier performance metrics, level codes, weight, and performance-level ranges.

Supplier Performance Element

Essential performance factors (such as total candidates submitted, total positions filled, or total work orders rejected).

Supplier Performance Metrics

Measurement of supplier performance based on specific predefined elements.

Services Supplier Score

Overall supplier score.

Note. This score is the supplier total weight (or score) divided by the total weight of the supplier rule.

Setting Up Performance Level Codes

To set up performance level codes, use the Performance Level Codes (SPB_LVL_CD) component.

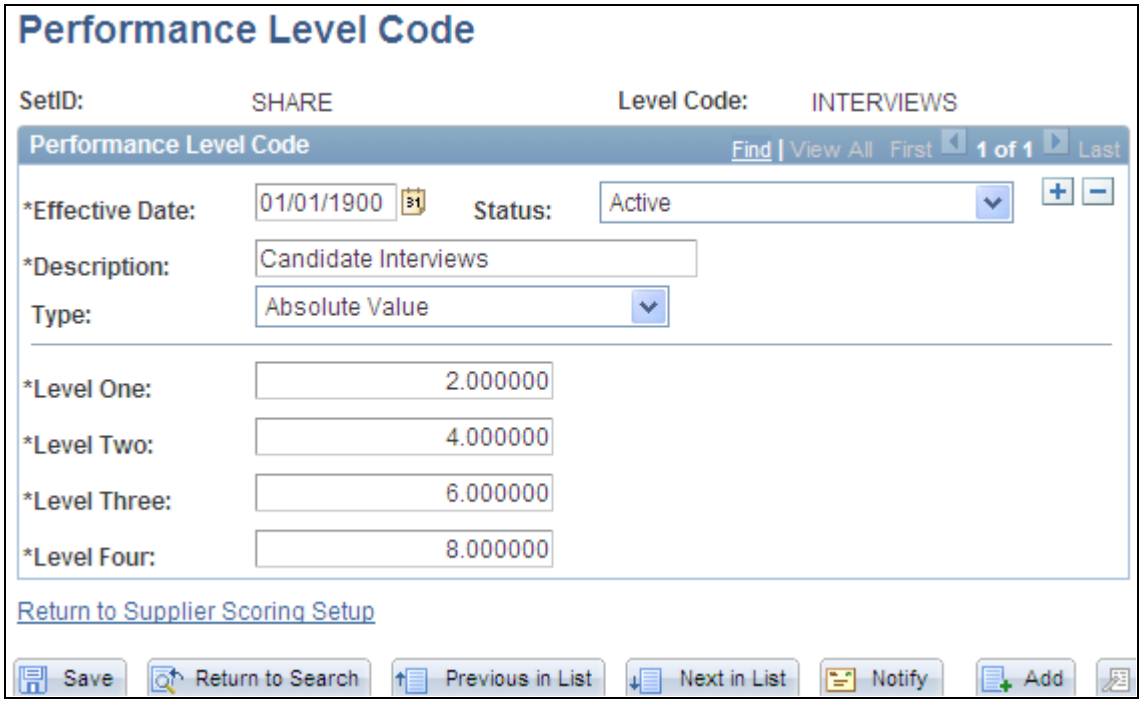
This section discusses how to set up performance level codes.

Page Used to Set Up Performance Level Codes

Page Name	*Definition Name*	*Navigation*	*Usage*
Performance Level Code	SPB_LVL_CD	Services Procurement, Define Services Procurement, Sourcing Setup, Supplier Scoring Setup, Performance Level Codes	Determine various levels at which suppliers perform.

Setting Up Performance Level Codes

Access the Performance Level Code page (Services Procurement, Define Services Procurement, Sourcing Setup, Supplier Scoring Setup, Performance Level Codes).



Performance Level Code page

Type Select *Absolute Value.*

Level One, Level Two, Level Three, and **Level Four**

Enter four maximum range values for the performance level that you create. Use these values to determine the range for evaluating supplier performance levels. For example, you might create performance level code INTERVIEW to determine the number of candidate interviews that a supplier is scheduled for per requisition. The performance levels for the INTERVIEW performance code might include the following levels: Level One = 2, Level Two = 4, Level Three = 6, and Level Four = 8. In this example, level four represents the best possible score and level one represents the worst possible score.

Note. Reverse levels as needed.

Setting Up Supplier Scoring Rules

To set up supplier scoring rules, use the Supplier Scoring Rules (SPB_SUP_SCORE_RULE) component.

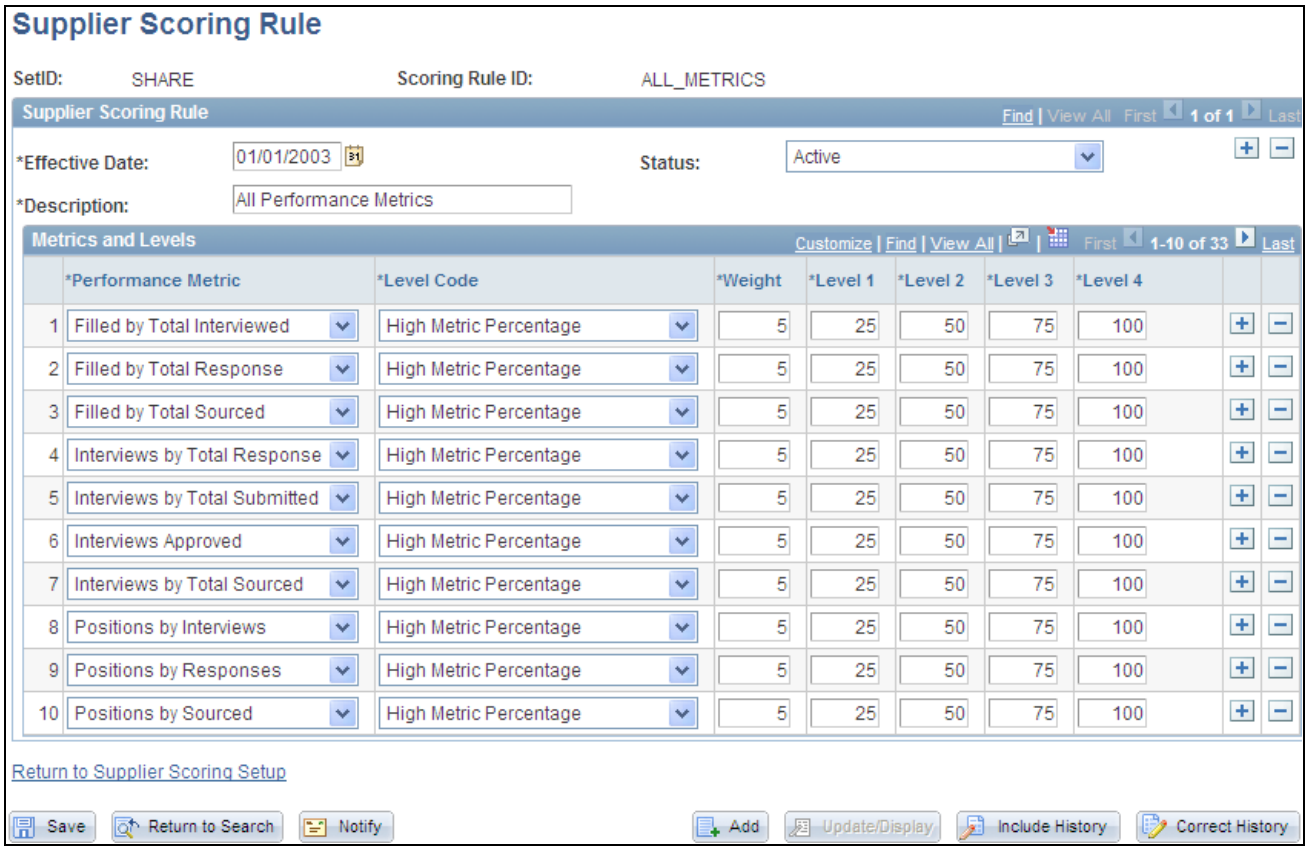
This section discusses how to set up supplier scoring rules.

Pages Used to Set Up Supplier Scoring Rules

Page Name	*Definition Name*	*Navigation*	*Usage*
Supplier Scoring Rule	SPB_SUP_SCORE_RULE	Services Procurement, Define Services Procurement, Sourcing Setup, Supplier Scoring Setup, Scoring Rules	Define a supplier scoring rule that calculates supplier scoring metrics, level codes, weight, and performance-level ranges.

Setting Up Supplier Scoring Rules

Access the Supplier Scoring Rule page (Services Procurement, Define Services Procurement, Sourcing Setup, Supplier Scoring Setup, Scoring Rules).



Supplier Scoring Rules page

Performance Metric Select one or more performance elements to calculate the supplier score.

Weight Enter the best possible weight that you want suppliers to receive. The weightings reflect the relative importance for each metric included in the rule.

Note. Enter desired weighting amount. The weight value need not equal 100 percent.

Setting Up Supplier Scoring Parameters

This section discusses how to set up supplier scoring parameters.

Page Used to Set Up Supplier Scoring Parameters

Page Name	*Definition Name*	*Navigation*	*Usage*
Services Procurement Business Unit Options	BUS_UNIT_TBL_SP	Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Defn, Services Procurement Definition	Define consolidation structures for accounting and reporting purposes.

Setting Up Supplier Scoring Parameters

Access the Services Procurement Business Units Options page (Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Defn, Services Procurement Definition).

Supplier Scoring

Minimum Supplier Score

Enter the minimum score that a supplier must have in order to bid on a requisition. Supplier must have this score or higher to meet the requisition requirements and appear on the sourcing selection page. Suppliers below the score do not appear on the sourcing selection page.

Note. It is also possible to define a minimum supplier score at the service type level. If a minimum score is defined, it takes precedence over the minimum score setting of the BU.

Scoring Rule ID

Enter the scoring rule (group of metrics) that is used to score suppliers.

Use Current Date

Select to define duration date as the current system date. If selected, the system uses the number of reporting months relative to the current system date for each process instance.

Duration Date

Enter the date that is used to determine the ending date for the analysis data. Score processing includes the duration defined by the specified number of months going backward or forward from this date.

Note. This field is only available when the Use Current Date is not selected.

Exclude All Data Before

Enter the date that is used to determine the absolute begin date of the analysis data. The system retrieves data from this date forward. The default is the current system date.

Note. If the values that you enter for duration date and number of reporting months define a date before the entered start date, the system does not retrieve data prior to the entered start date. For example, if the start date is January 1, 2010, the duration date is June 30, 2010, and number of reporting months is 12, indicating that you want 12 months of data prior to June 30, 2010, then the system retrieves data only for the period between January 1, 2006 and June 30, 2010. Data prior to January 1, 2010, or in this example between July 1, 2009 and December 31, 2009, is not retrieved.

# of Reporting Months (number of reporting months)

The system uses the duration date in conjunction with the number of reporting months to determine the time period that is used to retrieve the analysis data. Enter the number of reporting months to define the number of months before or after the duration date for which you want to retrieve data.

Enter a positive value for number of reporting months to indicate the number of months starting from the duration date to be included in the process. Use a negative number to indicate the number of months prior to the duration date to include in the process.

Note. The system does not retrieve data prior to the entered start date regardless of the entered duration date and number of reporting months.

Process Scores

Click to access the Supplier Score page, where you can process scores for the specified scoring rule ID.

See Also

Chapter 4, "Setting Up PeopleSoft Services Procurement," Setting Up Business Unit Definitions, page 32

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," page 79

Viewing PeopleSoft Services Procurement Pages That Use Supplier Scoring

This section provides you with a table of PeopleSoft Services Procurement pages that use supplier scoring.

Table of Pages That Use Supplier Scoring

There are three Supplier Scoring pages:

Page Name	*Navigation*	*Usage*
Sourcing Selection	Services Procurement, Review and Source Requisitions Click the sourcing selection icon that corresponds with the requisition ID and line that you want to source. Home, Worklist Click the link that corresponds with the requisition ID and line that you want to source.	Enter sourcing requirements.
Supplier Scoring Results	Click the Score Analysis button on the Sourcing Selections page.	View the vendor score.
Services Procurement Business Unit Option	Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Defn (Services Procurement Definition)	Set up sourcing parameters.

Appendix A

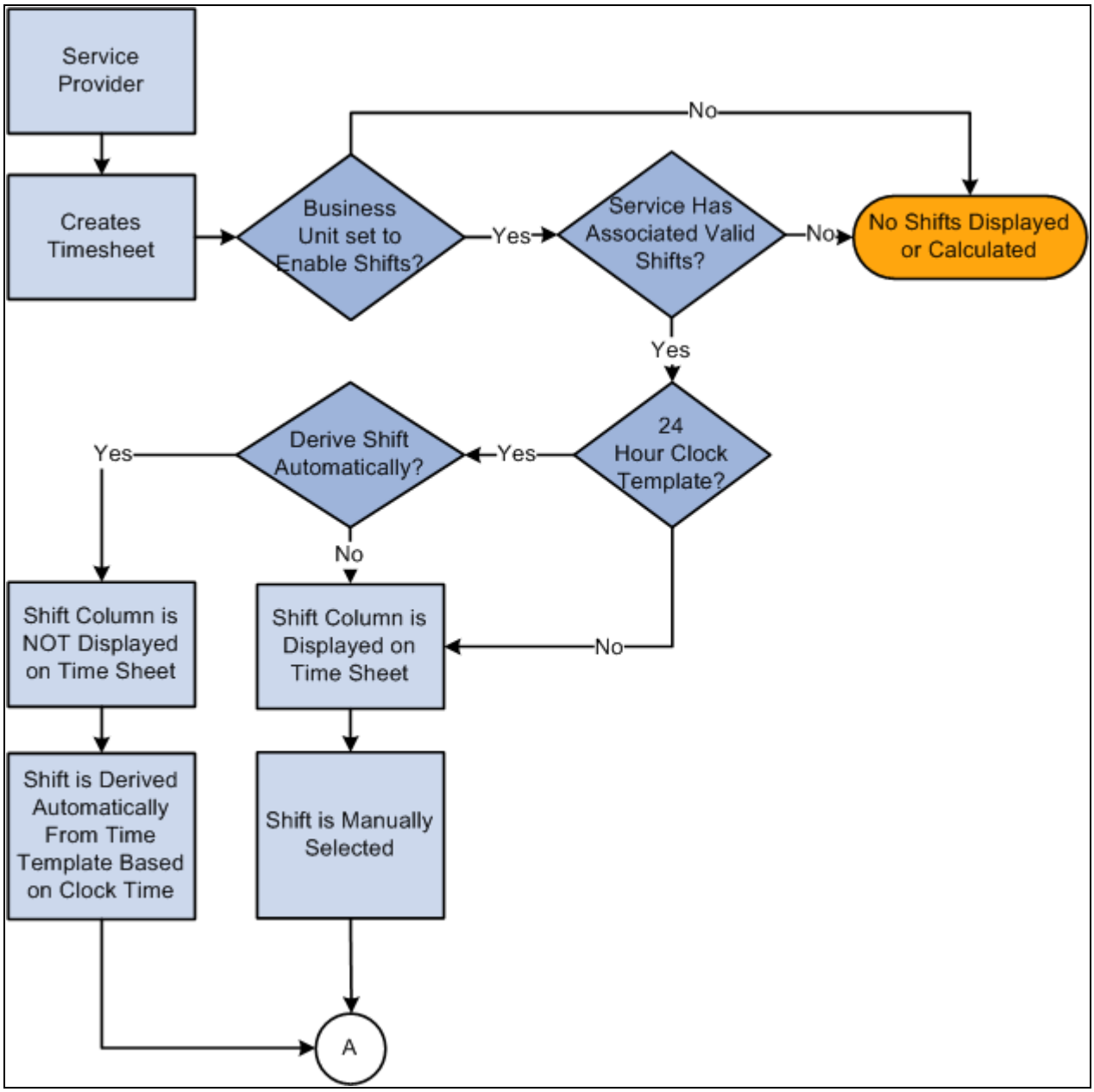
Additional Implementation Process Flow Information

This chapter discusses important implementation process flow information relating to:

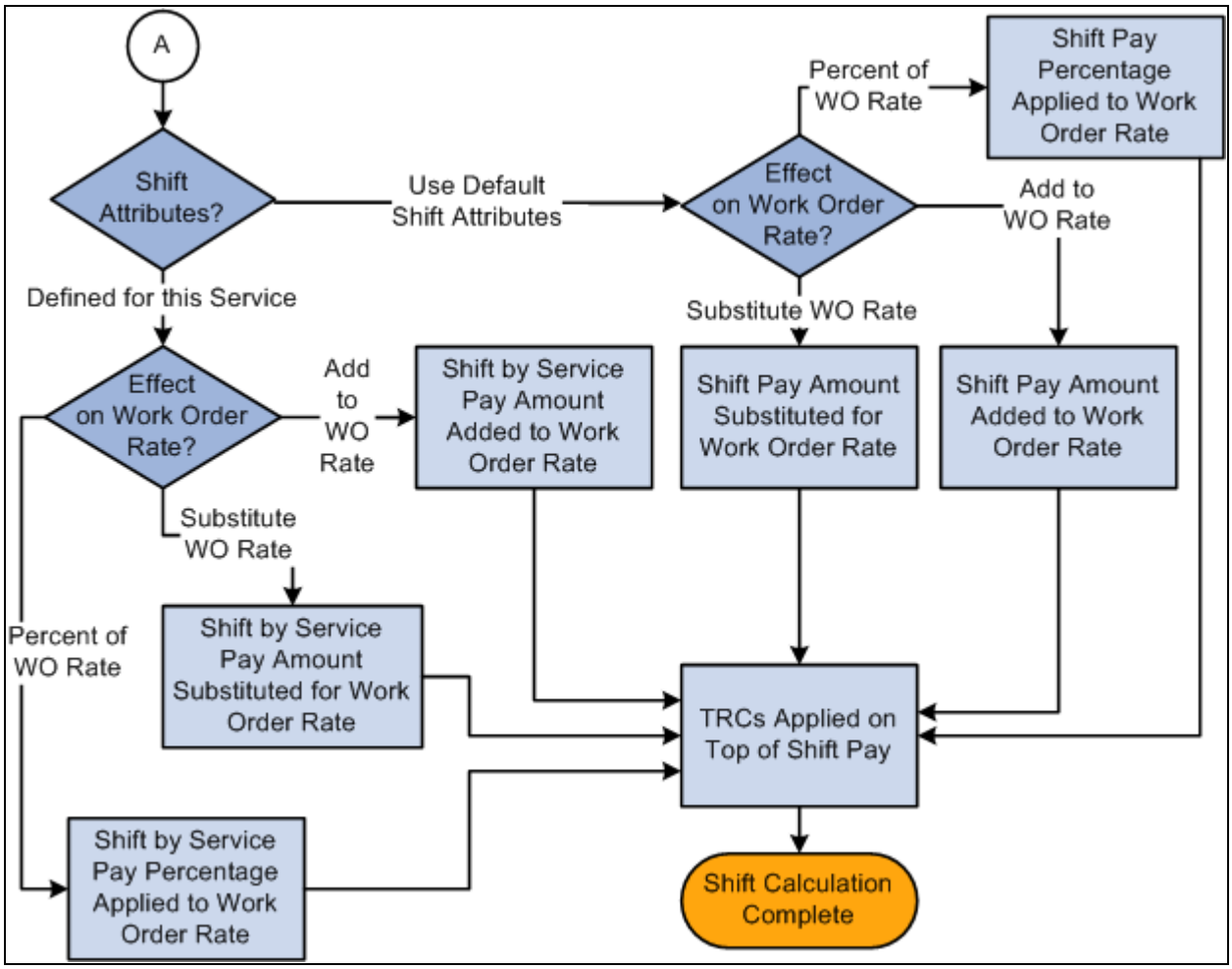
- Shifts.
- Assignments.
- Time category overrides.
- Service provider/coordinator role.

Shifts Process Flow

The following diagrams illustrate the process flow for shifts in PeopleSoft Services Procurement:



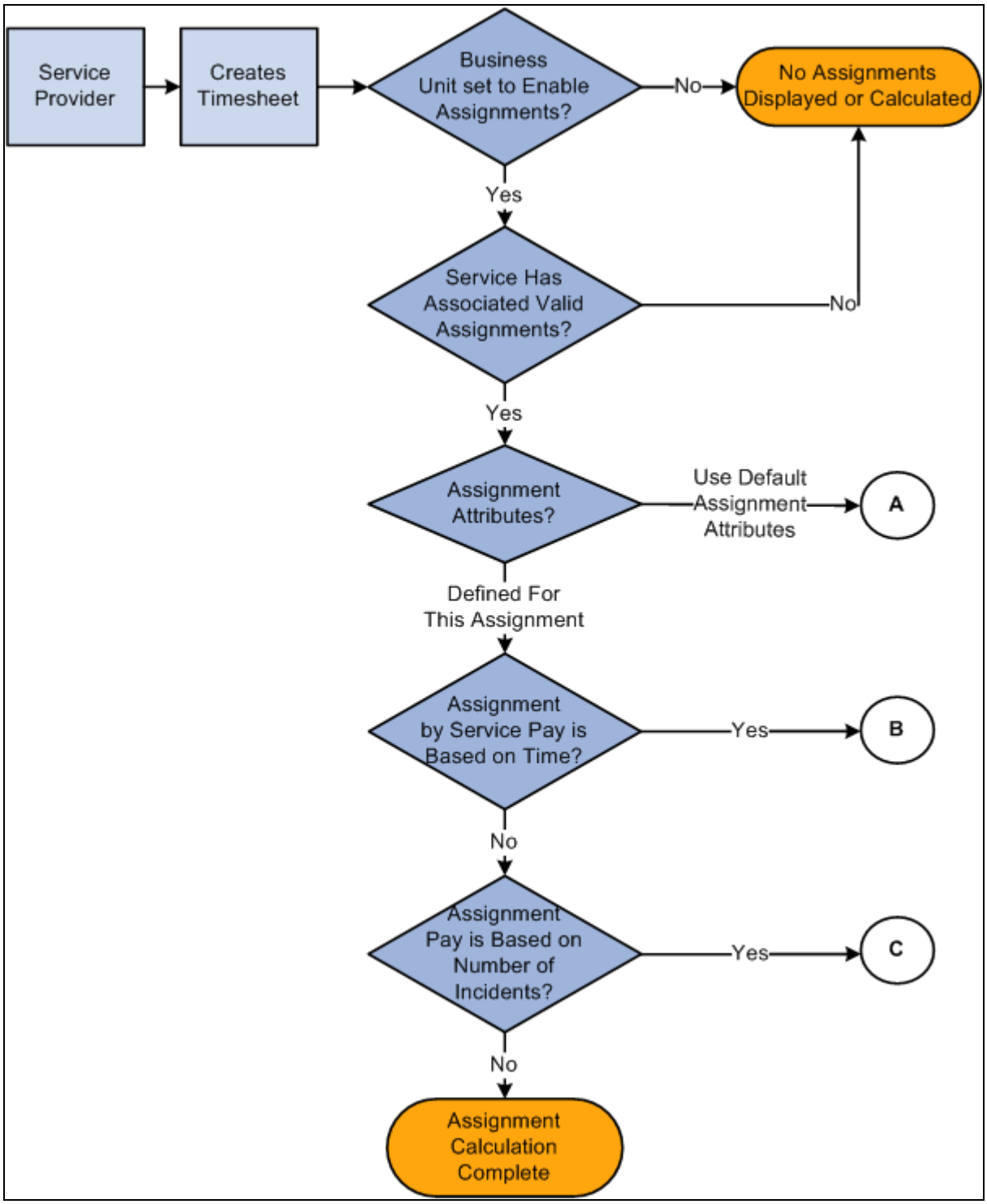
Shifts Process Flow (1 of 2)



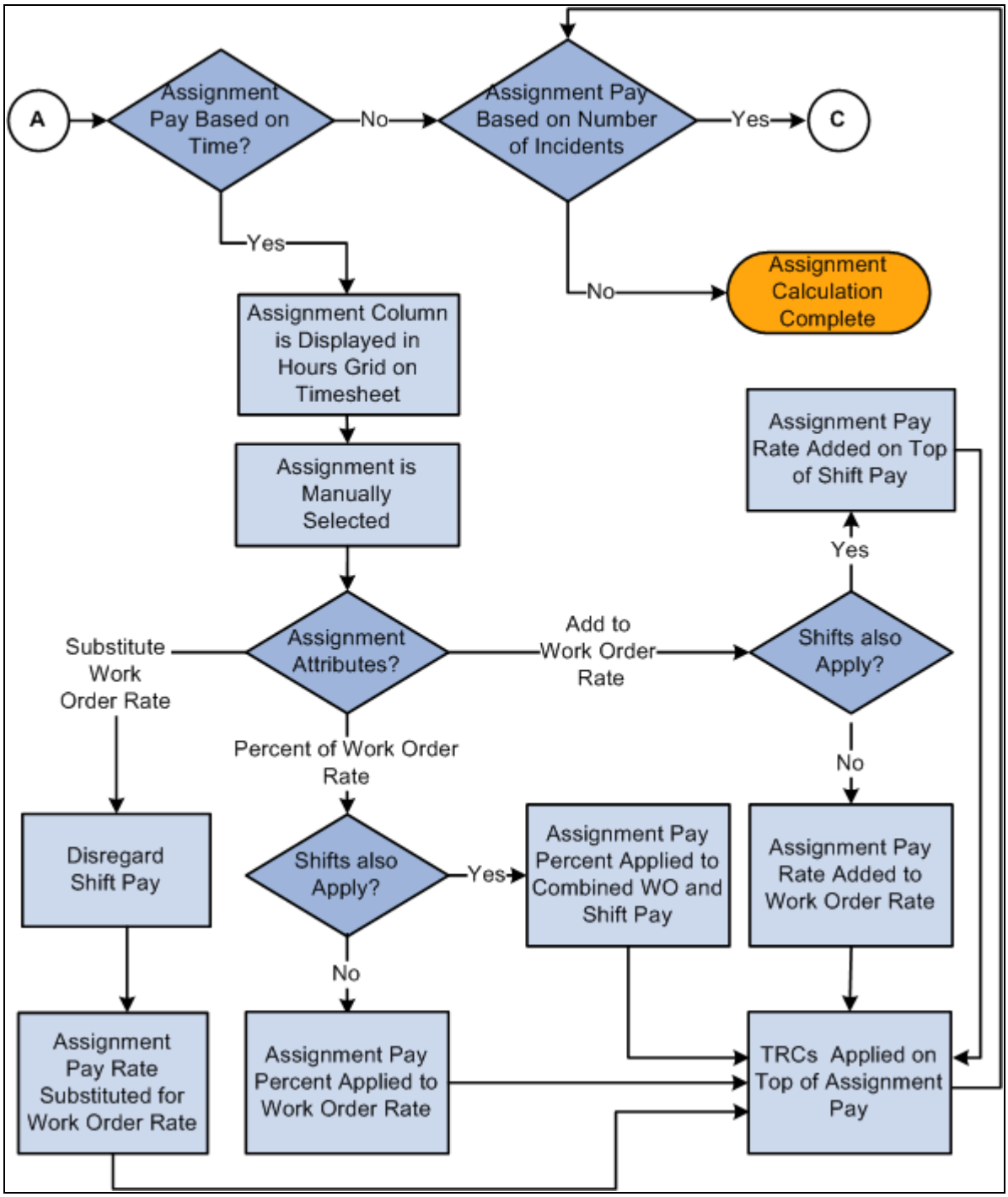
Shifts Process Flow (2 of 2)

Assignments Process Flow

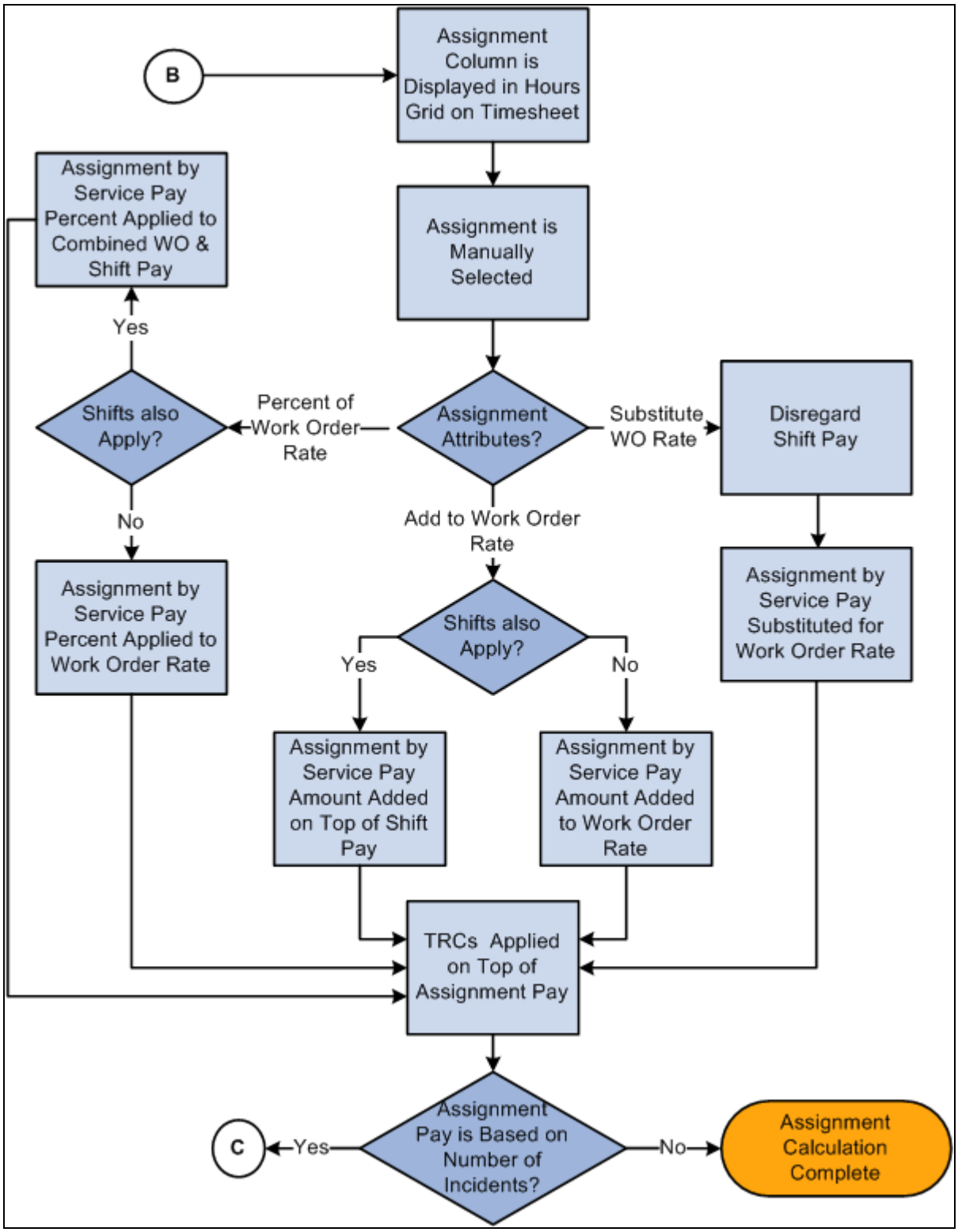
The following diagrams illustrate the process flow for assignments in PeopleSoft Services Procurement:



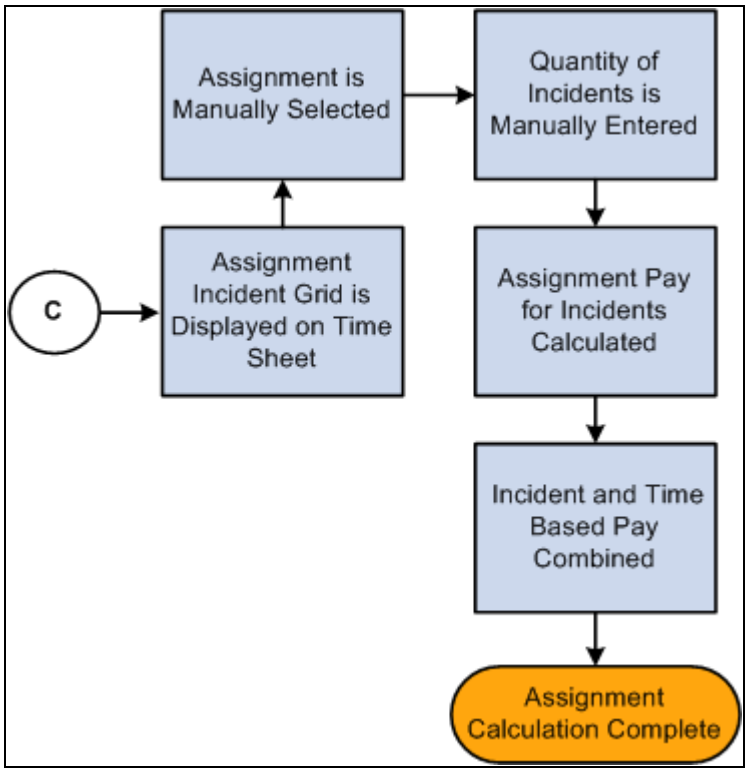
Assignments Process Flow (1 of 4)



Assignments Process Flow: A (2 of 4)



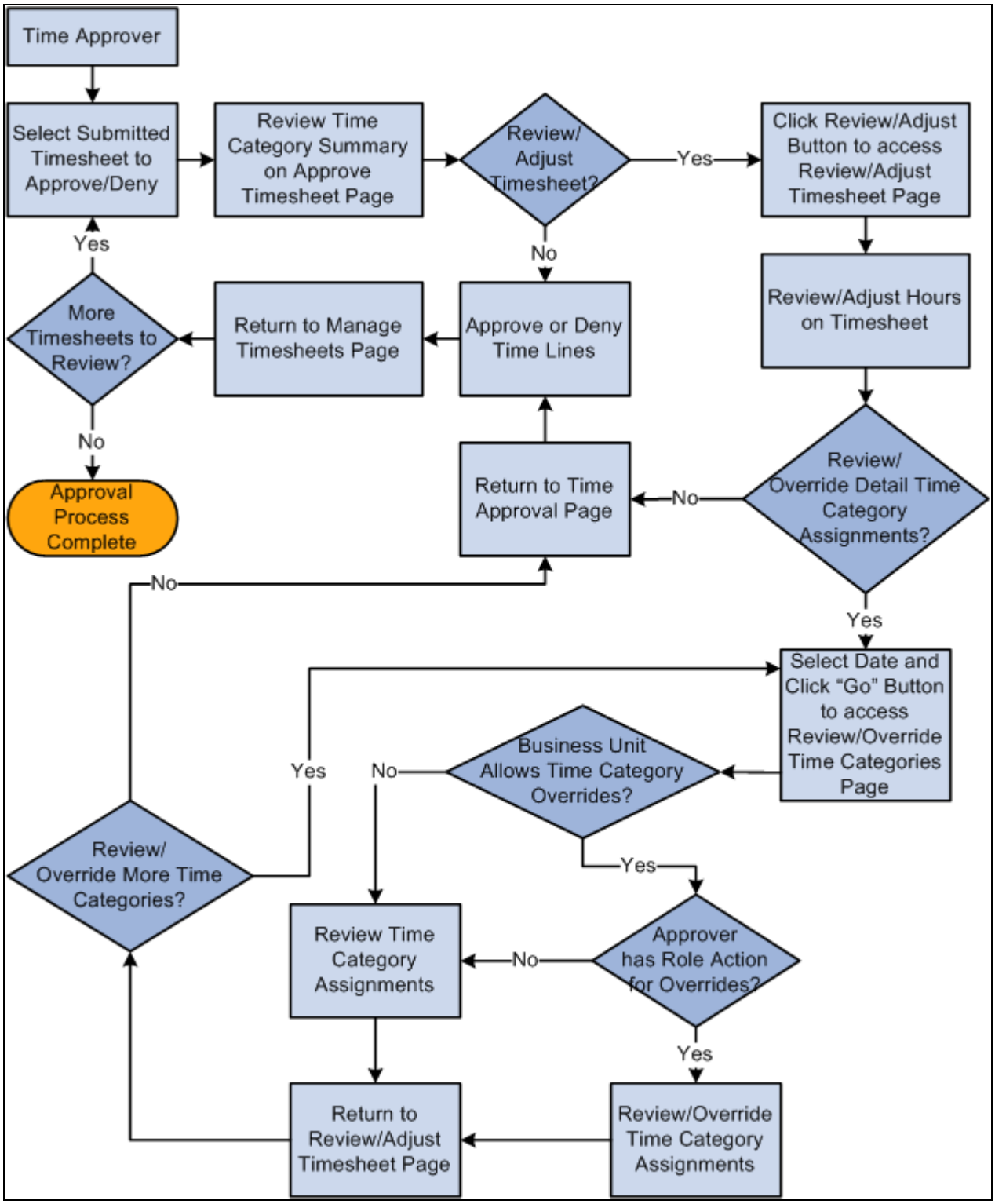
Assignments Process Flow: B (3 of 4)



Assignments Process Flow: C (4 of 4)

Time Category Override Process Flow

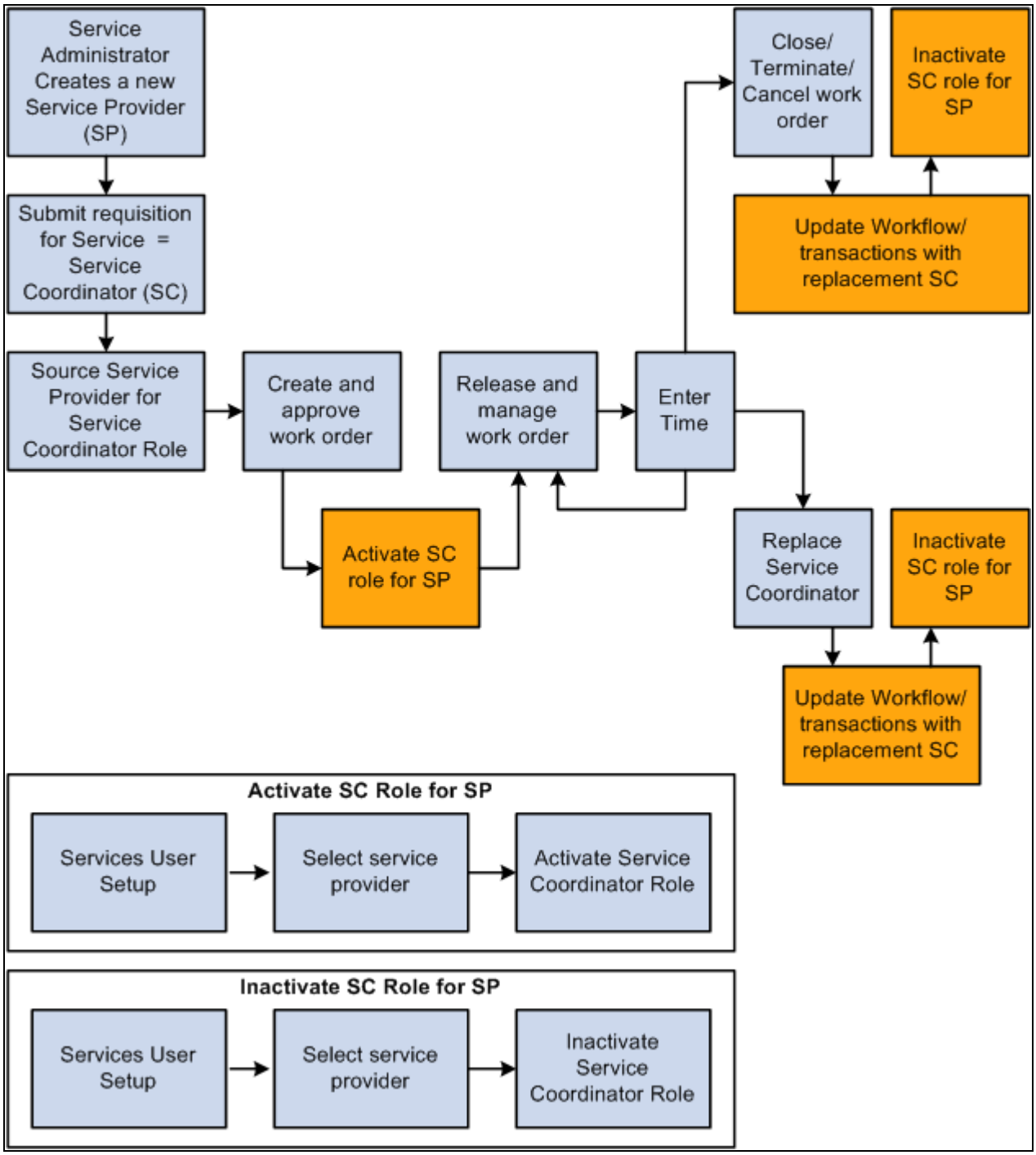
The following diagram illustrates the process flow for time category overrides in PeopleSoft Services Procurement:



Time Category Override Process Flow

Service Provider/Coordinator Role Process Flow

The following diagram illustrates the process flow for service provider/coordinator role used in PeopleSoft Services Procurement:



Service Provider/Coordinator Combined Role process flow

Service Provider/Coordinator Role — Worklist Information

This section lists the worklist information that is moved or created when you replace a service coordinator on requisitions and work orders.

Requisitions

The following table lists the worklist information that is moved or created when you replace a service coordinator on requisitions:

Step	***Requisition Status***	***Worklist Description***	***Reassign Worklists - Assign To the Team Members****
1	Open	Define Rate worklist entries (depending on the business unit setup information)	All team members
2	Pending/Denied	Preapproval Sourcing Worklist (based on the allow Sourcing Prior to approval option on the business unit setup)	All team members
3	Approved	Sourcing Worklist	All team members
4	Sourced	Approved Worklist Sourcing Worklist Last Bid Worklist (one for each supplier; worklists needs to be triggered in case of a team)	Default team member
5	Filled	Approved Worklist Sourcing Worklist Work Order Creation Worklist	Default team member
6	Canceled	None	None
7	Closed	None	None

*When no team is involved, the Worklist items will be assigned to the specific replacement service coordinator.

Work Orders

The following table lists the worklist information that is moved or created when you replace a service coordinator on work orders:

Step	***Requisition Status***	***Worklist Description***	***Reassign Worklists - Assign To the Team Members****
1	Open/Denied	Define Rate worklist entries (depending on the business unit setup information) Alert Worklist Entries	All team members
2	Submitted	Alert Worklist Entries	Default team member
3	Approved	Approved Worklist, Alert Worklist Entries	Default team member
4	Released	Alert Worklist Entries Survey Worklist Entries	Default team member
5	Canceled/Closed/Terminate	Alert Worklist Entries Survey Worklist Entries	Default team member
6	Extended/Reassign	None	None

*When no team is involved, the Worklist items will be assigned to the specific replacement service coordinator.

Appendix B

PeopleSoft Services Procurement Use Scenarios

This appendix discusses real-life scenarios for using PeopleSoft Services Procurement to:

- Shifts used in PeopleSoft Services Procurement.
- Shifts and assignments - use case scenarios.

Understanding This Appendix

This appendix presents scenarios of how to use some of the features within PeopleSoft Services Procurement. These real-life examples describe some of the intended uses of these features, enabling you to understand how these features might be applied to your own organization.

Note. These real-life examples describe some of the intended uses of these features, enabling you to understand how these features might be applied to your own organization. The real-life scenarios described within this PeopleBook may not conform to the business rules and procedures within your organization. Do not construe these examples as consulting or implementation advice for your specific industry or your individual organization. You should adapt or disregard the information here based on the needs of your organization. PeopleSoft does not guarantee that the information included here will work as intended within your customized environment.

Using Shifts in PeopleSoft Services Procurement

This section discusses how you can use shifts in PeopleSoft Services Procurement.

Shift Example

You create and release work order 1000 for an IT worker service with a rate of $35 per hour and a duration from 07/01/2004 to 06/30/20. The service provider will be spending some time on the swing shift, which may qualify for special pay. The following shift definitions are applicable over the course of the work order:

Swing Shift Definition

Effective Date	*Start/Stop Time*	*Shift Percent*	*Shift Rate (MHR)*	*Rate Type*
01/01/1900	3:00PM/11:00PM	10	NA	NA

Effective Date	Start/Stop Time	Shift Percent	Shift Rate (MHR)	Rate Type
01/01/2005	3:00PM/11:00PM	NA	$5.00	Add to WO Rate
01/01/2010	2:00PM/10:00PM	NA	$5.00	Add to WO Rate

Swing Shift by Service Definition for IT Worker

Effective Date	Shift Attribute Value	Start/Stop Time	Shift Percent	Shift Rate (MHR)	Rate Type
01/01/2004	Use Default Shift Attributes	NA	NA	NA	NA
01/01/2007	Define for this Service	3:00PM/11:00PM	NA	$45.00	Substitute WO Rate
01/01/2009	Use Default Shift Attributes	NA	NA	NA	NA
01/01/2011	Disable Shift for This Service	NA	NA	NA	NA

Swing Shift by Service Definition for IT Worker based on Time Template

Effective Date	Automatically Derive Shifts	Associated Shifts	Start/Stop Time	Hours Worked
01/01/1990	No	NA	NA	NA
01/01/2011	Yes	Swing	1:00PM to 9:00 PM	Hours worked are compared to the shift start and stop times defined on time template.
01/01/2011	Yes	Grave	9:00PM to 5:00AM	Hours worked are compared to the shift start and stop times defined on time template.

Selected Timesheet Information for Work Order 1000

This table outlines specific timesheet information that was entered for work order 1000:

Date Worked	Hours Worked	Shift Attributes	Rate
06/30/2004	10:00 AM to 3:00PM	No related shift	First 5 hours at $35.00 — Work Order Rate

Date Worked	*Hours Worked*	*Shift Attributes*	*Rate*
06/30/2004	3:00PM to 6:00PM	Swing shift — Use Default Shift Attributes	Last 3 hours at $38.50 — Shift rate (5.00 + 10%)
06/30/2007	10:00 AM to 3:00PM	No related shift	First 5 hours at 5.00 — Work Order Rate
06/30/2007	3:00PM to 6:00PM	Swing shift — Defined for this Service	Last 3 hours at 5.00 — Shift by Service rate)(5.00 substitute)
06/30/2009	10:00 AM to 3:00PM	No related shift	First 5 hours at 5.00 — Work Order Rate
06/30/2009	3:00 AM to 6:00PM	Swing shift — Use Default Shift Attributes	Last 3 hours at 0.00 — Shift rate (5.00 + (.00)
06/30/201	10:00 AM to 2:00PM	No related shift	First 4 hours at 5.00 — Work Order Rate)
06/30/2010	2:00PM to 6:00PM	Swing shift — Use Default Shift Attributes	Last 4 hours at 0.00 — Shift rate (5.00 + (.00)
01/01/2011	10:00AM to 1:00PM	No related shift	First 3 hrs at $35.00 — Work Order Rate
01/01/2011	1:00PM to 6:00PM	Swing	Last 5 hours at $40.00 (based on time template)
06/30/2011	10:00 AM to 6:00PM	No related shift	8 hours at $35.00 — Work Order Rate

Criteria for Shift Display and Selection on Timesheet

This section discusses how the shift value affects the information that is displayed on the timesheet.

1. Is the time template defined to automatically derive shift?

   - If the answer is Yes the system derives the appropriate shift based on the start and end times from the template.

     Is there an effective-dated record defined for the shifts by service for the date worked? If Yes, what is the shift attributes setting for the shift on this date?

     - Use Default Shift Definition: Skip steps 2 and 3; Shift column is not displayed on timesheet, but shift pay is applied based on rate from the shift definition for the date worked.

     - Define for this Service: Skip steps 2 and 3; Shift column is not displayed on timesheet, but shift pay is applied based on Shift by Service definition for the date worked.

     - Disable Shift for This Service: Skip steps 2 and 3. Shift column is not displayed on timesheet and no shift pay is applied.

     If answer is *No*: Skip steps 2 and 3; Shift Column is not displayed on timesheet and no shift pay is applied.

   - If answer is *No,* go to step 2.

2. Is there an effective-dated record defined for shifts by service for any dates within the timesheet date range?

   If answer is:

   - *Yes*: What is the Shift Attributes settings for the shifts during the timesheet date range?

     - All are set to Use Default Shift Definition or Define For this Service: Shift column is displayed on timesheet, and all shifts are available for selection. Go to step 3

     - Some are set to No Longer Valid: Shift column is displayed on timesheet, and all shifts with a Shift Attributes setting except Disable Shift for This Service effective somewhere within the date range are available for selection. Go to step 3.

     - All are set to Disable Shift for This Service: Shift column is not displayed on timesheet. Skip step 3.

   - *No*: Shift column is not displayed on timesheet. Skip step 3.

3. Has a shift been selected for the time line?

   If the answer is:

   - *Yes:* Is there an effective-dated record defined for shifts by service for the specific date associated to the hours column?

     If Yes, then what is the Shift Attributes setting for that effective date?

     - Use Default Shift Definition: Hours field is accessible for that date. System uses rate information from Swing Shift Definition for the date that hours were worked, and replaces or augments work order rate accordingly.

     - Define for this Service: Hours field is accessible for that date. System uses rate information from Swing Shift and IT Worker Service Definition for the date that hours were worked, and replaces or augments work order rate accordingly

     - Disable Shift for This Service: Hours field is not accessible for that date. No hours can be associated to the shift for that date.

     If No, Hours field is not accessible, no hours can be associated to the shift for that date.

   - *No:* Hours field is not accessible for that date, and no hours can be associated to the shifts for that specific date.

Using Shifts and Assignments

The following are use cases using shifts and assignments.

1. Shift Pay: Certain time of day is paid at a fixed amount over the standard rate.

   - Base Pay: $10.00 per hour
   - Pay for time of day: $.25 per hour
   - Markup: 3%

   Bill Rate for Base Pay hours: $10.30 per hour ($10.00 + 3%)

   Bill Rate for Shift Pay hours: $10.56 per hour ($10.25 + 3%)

2. Shift Pay: Certain time of day is paid a percentage over the standard rate.

Note. Service Provider's work hours for a single day may cross multiple shifts, and a shift may cross multiple days.

- Base Pay: $10.00 per hour
- Shift 2: Base rate plus 10%
- Shift 3: Base rate plus 15%
- Markup: 3%

Bill Rate for base pay hours: $10.30 per hour ($10.00 + 3%)

Bill Rate for shift 2 hours: $11.33 (($10.00 + 10% = $11.00) + 3%)

Bill Rate for shift 3 hours: $11.85 (($10.00 + 15% = $11.50) + 3%)

3. Shift Pay Plus Overtime: Certain time of day is paid an additional shift rate on top of the standard rate, and overtime is paid a percentage over the shift pay rate.

Note. Overtime may be defined as more than a specified number of hours in a day or more than a specified number of hours in a week.

- Base Pay: $10.00 per hour
- Shift 2: Base rate plus 10%
- Shift 3: Base rate plus 15%
- Overtime: Rate in effect plus 50%
- Markup: 3%

Bill Rate for base pay hours: $10.30 per hour ($10.00 + 3%)

Bill Rate for overtime using Base Pay hours: $15.45 per hour (10.30 + 50%)

Bill Rate for shift 2 hours: $11.33 per hour(($10.00 + 10% = $11) + 3%)

Bill Rate for overtime using shift 2 hours: $17.00 per hour ($11.33 + 50%)

Bill Rate for shift 3 hours: $11.85 per hour (($10.00 + 15% = $11.50) + 3%)

Bill Rate for overtime using shift 3 hours: $17.78 per hour (11.85 + 50%)

4. Assignment Pay: Special rate paid when on call or called out.

   - On call amount paid per hour:

     - On call rate: $5.00 per on call hour

     - Call out fee: $100 per call out incident

     - Call out rate: $20 per call out hour

     - Markup: 5%

     Bill Rate for hours on call: $5.25 ($5.00 + 5%)

     Bill Rate for hours called out: $21.00 ($20.00 + 5%)

     Additional Billed Amount - Fixed fee per call out incidence: $105.00 ($100.00 + 5%)

   - On call amount paid at a fixed fee, hours are not recorded:

     - On call rate: $50.00 per on call period

     - Call out fee: $100.00 per call out incidence

     - Call out rate: $20.00 per call out hour

     - Markup: 5%

     Billed amount per on call shift: $52.50 ($50.00 + 5%)

     Bill Rate for hours called out: $21.00 ($20.00 + 5%)

     Additional Billed Amount - Fixed fee per call out incidence = $105.00 ($100,00 + 5%)

   - On call amount paid at a fixed fee, but hours are still recorded:

     - On call rate: $50.00 per on call period plus $5.00 per on call hour

     - Call out fee: $100.00 per call out incidence

     - Call out rate: $20.00 per call out hour

     - Markup: 5%

     Bill Rate for hours on call: $5.25 ($5.00 + 5%)

     Additional Billed Amount - Fixed fee per on call shift: $52.50 ($50.00 + 5%)

     Bill Rate for hours called out: $21.00 ($20.00 + 5%)

     Additional Billed Amount - Fixed fee per call out incidence: $105.00 ($100.00 + 5%)

The following additional use case covers the scenario where both shifts and assignments are applicable to the same work order:

Combined Shift and Assignment Pay: Certain time of day is paid at a fixed amount over the standard rate, certain type of work is paid at a percentage over the standard or shift rate.

- Base Pay: $10.00 per hour

- Pay for time of day: $.25 per hour
- Pay for type of work: 20%
- Markup: 3%

Bill Rate for Base Pay hours: $10.30 per hour ($10.00 + 3%)

Bill Rate for Shift Pay hours: $10.56 per hour ($10.25 + 3%)

Bill Rate for Assignment Pay hours: $12.36 per hour (($10.00 + 20% = $12.00) + 3%)

Bill Rate for Combined Shift and Assignment Pay hours: $12.67 per hour (($10.25 + 20% = $12.30) + 3%)

Using a Skills Matrix on Requisitions

Considerations for using a skill matrix on requisitions include:

1. The requestor is going to need to input the skills on the requisition with each of the skills prioritized. This will force the Requestor to think hard about what they are looking for in a candidate. This should improve the success of the overall process as down-stream activities will have access to more and better information about the required skills.
2. A Service Provider Contact when entering a SP bid, will get a notification when a candidate is missing the required skill. The SP Contact will then have the option of self-rejecting the candidate and not submitting them or they may even try to better-represent the skills of the SP in the event that the SP skills profile is missing information that actually existed for the candidate.
3. A service coordinator will want to compare the skills of candidates as part of their decision process. Once completed, they may eliminate candidates prior to entering them into the bid factor analysis due to a lack of skill fit. Service coordinators will need to visually compare the skills of the candidate against the skills of the requisition.

Appendix C

PeopleSoft Human Capital Management Integration

This appendix provides an overview of PeopleSoft Services Procurement and Human Capital Management integration, provides prerequisites, lists common elements, and discusses how to:

- Set up and use HCM terminology within Services Procurement.
- Set up Human Capital Management and PeopleSoft Services Procurement person integration.
- Set up PeopleSoft Talent Acquisition Manager and PeopleSoft Services Procurement integration.

Understanding PeopleSoft Services Procurement and Human Capital Management Integration

Many PeopleSoft applications offer seamless integration with other selected PeopleSoft applications. PeopleSoft Services Procurement integrates with PeopleSoft Human Capital Management. When you install both Supply Chain Management (SCM) and HCM database structures, you can configure the system to use the HCM database as the system of record and initiate consistent terminology between the PeopleSoft Services Procurement and PeopleSoft HCM applications. Services Procurement can be registered as a vendor in Talent Acquisition Manager and job postings can be sourced to Services Procurement.

Note. You must register services procurement administrators, approvers, requesters, and service coordinators in the HCM database first. After you register these users in the HCM database, you can then register them as Service Procurement users and assign specific roles in the SCM database.

Note. You cannot enable the HCM integration if you've already selected the MSP Installation option on the Services Procurement Installation Options page.

When you implement PeopleSoft Services Procurement for use with HCM applications, you can configure HCM as the system of record to maintain user details. When the HCM Person Integration Enabled check box is selected on the Services Procurement Installation Options page, enterprise administrators can register a Services Procurement user as an HCM person with a unique employee ID and create unique operator login profiles within the HCM database which is then synchronized to the SCM database.

The following users have a specific role that enables them to perform specific tasks within the application. Some are registered in the HCM database with a unique person ID, while others are created only in the SCM database without a person ID:

- *Approver:* This enterprise user can be designated as requisition, work order, time, progress log, expense, or invoice approver.

  This user is created in the HCM database as an HCM person with a unique employee ID.

- *Hiring Manager/Requester:* This enterprise user creates requisitions and determines specific requirements for a resource and creates a requisition listing those requirements. The requester might designate a service coordinator to source the requisition and handle the fulfillment process. This user is created in the HCM database as an HCM person with a unique employee ID. When you activate HCM Talent Acquisition Manager integration, the hiring manager, who sends a Talent Acquisition Manager job posting to Services Procurement for sourcing must also be added as a Services Procurement requester in the SCM database to complete the transfer and submit the requisition for sourcing.

- *Services Coordinator:* This user may work for the enterprise or the supplier.

  He or she handles the sourcing of requisitions to different suppliers and also handles supplier bids to ensure that the request is filled with the most qualified resource. The enterprise service coordinator user is created in the HCM database as an HCM person with a unique employee ID.

- *Service Procurement Administrator:* This user can register all other users in the Services Procurement system, as well as perform basic application setup.

  This user is created in the HCM database as an HCM person with a unique employee ID.

- *Service Provider Contact:* This is a non-enterprise user who manages a team of service providers and handles bidding with the service coordinator.

  This user is registered in SCM database and does not have a corresponding HCM person ID and a unique employee ID.

- *Service Provider:* This supplier resource is submitted as a potential candidate for a sourced requisition.

  The service provider is registered in the SCM database and has a unique Services Procurement person ID. When you approve a Services Procurement work order, the system sends the associated service provider's personal information to the HCM database for creation of a new HCM person, operator login profile, and job assignment information. For integration with Talent Acquisition Manager, after a Services Procurement candidate is filled for a job posting and hired in HCM, the system creates a unique operator login profile in HCM and synchronizes the data to the SCM database.

See *PeopleSoft HRMS Application Fundamentals 9.1 PeopleBook*

Prerequisites

To use PeopleSoft Human Capital Management and PeopleSoft Services Procurement integration, you must first install both the HCM and SCM databases.

Common Elements Used in This Chapter

Login Profile	Operator profile or user profile.

HCM Person	A person within the HCM system that has a unique employee ID. This person could be an employee or a contingent worker.
Services Procurement Person	A user who is registered in Services Procurement. A Services Procurement person entry is created for service coordinators, service provider contacts and service provider type of users.
HCM User	An administrator that has access to the HCM database.
SCM User	An administrator or other user who has access to the SCM database.
Job Family	The grouping of jobs to make it easier to assign a competency or competency cluster to similar jobs.
Job Function	Creates function categories that can then be assigned to job codes.
Job Code	In HCM, jobs are identified by job codes. You use job codes to maintain information about jobs independent of the person of group performing that job. For example, salary grades and standard hours are assigned to a job regardless of who holds that job.
Job Profile	Identifies a set of competencies, subcompetencies, and responsibilities that apply to employees in the same job or job family.
Establishment	A country specific option for USA or France. **Note.** This option is only visible when the regulatory region is USA or France.
Labor Agreement	This is a country-specific required field for Spain. **Note.** This option is only visible when the regulatory region is Spain.
Job Posting	A job requirement defined within the HCM Talent Acquisition Manager application and sent to Services Procurement for fulfillment.

Setting Up and Using Human Capital Management Terminology Within Service Procurement

This section provides an overview of PeopleSoft Human Capital Management terminology integration and discusses how to set up installation options.

Understanding PeopleSoft Human Capital Management Terminology Integration

When the Use HCM Terminology check box is selected on the Services Procurement Installation Options page, the current service and service type labels are replaced with job code and job family labels throughout the PeopleSoft Services Procurement system. Because the job family and job function terms are widely used throughout HCM applications, you can configure the system to use HCM terminology consistently across both the SCM and HCM databases.

This table lists the terminology for PeopleSoft Services Procurement when HCM integration is selected.

Note. When you enable HCM terminology integration, all service and service type labels change to job family and job code labels respectively.

Page Name in Services Procurement	*Page Name When Use HCM Terminology is Selected*	*Search Pages*
Service Type	Job Family	Service Type changes to Job Family
Service	Job Code	Services changes to Job Code
Project Role	Job Code	Services changes to Job Code

Pages Used to Set Up Human Capital Management Terminology Integration

Page Name	*Definition Name*	*Navigation*	*Usage*
Services Procurement Installation Options	INSTALLATION_SP	Set Up Financials/Supply Chain, Install, Installation Options, Services Procurement	Define PeopleSoft Services Procurement installation options.
Existing Service Type/Service	SP_SERVICETYPE_WK	This page automatically populates if you do not have the correct job code/job family relationship.	Fix the job code and job family relationship before you select the Use HCM Terminology check box on the Services Procurement Installation Options page. **Note.** You can only have a job family associated to a job code.

Setting Up Installation Options

Access the Services Procurement Installation Options page (Set Up Financials/Supply Chain, Install, Installation Options, Services Procurement).

Use HCM Terminology Select to modify HCM terminology throughout PeopleSoft Services Procurement. When you select this option, all current service and service type labels change to job code and job family labels.

If you select the Use HCM Terminology check box, the MSP Installation check box is not available.

Note. When you select the Use HCM Terminology check box, the system validates the relationship between the existing job family and job codes. PeopleSoft Human Capital Management allows only one job family per job code, while Services Procurement allows multiple service types per service. Because of this restriction from HCM, you cannot enable the HCM terminology if there are services present with more than one related service type. If this situation occurs, the system provides a secondary page that informs you that service and service type relationships do not meet the criteria. To continue with the conversion to HCM terminology, you must remove the additional relationships.

Setting Up Human Capital Management and Services Procurement Person Integration

This section discusses how to:

- Set up installation options.
- Set up business unit definitions.
- Set up service operations - incremental synchronization.
- Set up service operations - full-table synchronization.
- Activate full-table publish rules.
- Register enterprise service administrators, approvers, requesters, and service coordinators.
- Register service provider contacts.
- Register service providers.
- Use the Service Operations Monitor.

Pages Used to Set Up PeopleSoft HCM and Services Procurement Person Integration

Page Name	*Definition Name*	*Navigation*	*Usage*
Services Procurement Installation Options	INSTALLATION_SP	Set Up Financials/Supply Chain, Install, Installation Options, Services Procurement	Define PeopleSoft Services Procurement installation options.

Page Name	*Definition Name*	*Navigation*	*Usage*
Services Procurement Business Unit Definition	BUS_UNIT_TBL_SP	Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Definitions	Define PeopleSoft Services Procurement business units. Define your consolidation structures for accounting and reporting purposes.
Services User Setup	SPB_USER_SETUP_PG1	Services Procurement, Maintain Users, Services User Setup	Maintain user setup for requesters, service coordinators, service providers, and service provider contacts.
Services User Setup	SPB_USER_SETUP_PG2	Click the Create a new Services User button, and then click the Requester button.	Determine whether the new user has an existing user profile or needs a new profile, add new users as requesters, and establish security and user preferences for the new user.
User Profile Information	SPB_USR_PROFILE_PG	Click the User Profile link on the Services Procurement Setup page.	Enter user ID and password information for the new requester.
Requester Setup	REQUESTOR_TBL	Click Go on the Services User Setup page to add the new user as a requester on the Requester Setup page.	Define requisition and catalog defaults for the requester.
Business Unit Security by User ID	SEC_BU_OPR	Click the Unit by User ID link on the Services User Setup page.	Set up business unit access by user ID.
TableSet Security by User ID	SEC_SETID_OPR	Click the TableSet by User ID link on the Services User Setup page.	Set up TableSet access by user ID.
User Preferences	PV_OPR_LINKS	Click the User Preference link on the Services User Setup page.	Define overall and procurement preferences for the requester.
Maintain Service Coordinator	SPB_PERSON_PAGE	Click the Person ID link on the Services User Setup page.	Define personal information for the service coordinator.
Service Coordinator Information	SPB_COORDINATOR_PG	Click the Service Coordinator Information link on the Maintain Service Coordinator page.	Define employee and user ID information.

Page Name	*Definition Name*	*Navigation*	*Usage*
Maintain Service Coordinator - Phone and Email Details	SPB_USR_PH_EM_PAGE	Click the Phone and Email Details link on the Maintain Service Coordinator page.	Enter telephone and email details for the service coordinator.
User Login Information - User Profile Information	SPB_PERSLGN_SEC_PG	Click the Create User Profile button on the Service Coordinator Information page.	Define login information for the service coordinator.
Maintain Provider Contact	SPB_SP_PERS_PAGE	Click the Add button on the Services User Setup page.	Define personal information for the provider contact.
Provider Contact Information	SPB_PROV_CNTCT_PG	Click the Provider Contact Information link on the Maintain Provider Contact page.	Define supplier, location code, and create user profile.
Maintain Provider Contact - Phone and Email Details	SPB_USR_PH_EM_PG2	Click the Phone and Email Details link on the Maintain Provider Contact page.	Enter telephone and email details for the provider contact.
Maintain Service Provider	SPB_PERS_PROV_PAGE	Click the Add button to add a new Person ID on the Services User Setup page.	Define personal information for the service provider.
Service Provider Information	PB_INDP_PROV_PG	Click the Service Provider Information link on the Maintain Service Provider page.	Define work status, project role, supplier, years of experience, and other parameters to define the service provider.
Maintain Service Provider - Phone and Email Details	SPB_USR_PH_EM_PG3	Click the Phone and Email Details link on the Service Provider Information page.	Enter telephone and email details for the service provider.
Service Provider Skills	SPB_PROV_SKILL_PG	Click the Provider Skills link on the Service Provider Information page.	Select appropriate competencies for the service provider.
Services	IB_SERVICEDEFN	PeopleTools, Integration Broker, Integration Setup, Services	Define services.
Service Operations	IB_SERVICE	PeopleTools, Integration Broker, Integration Setup, Services Operations	Define service operations and associate them to services.
Routing Definitions	IB_ROUTINGDEFN	PeopleTools, Integration Broker, Integration Setup, Routings	Define routings associated with service operations.

Page Name	Definition Name	Navigation	Usage
Queue Definitions	IB_QUEUEDEFN	PeopleTools, Integration Broker, Integration Setup, Queues	Define queues to be used with the HCM integration.
Monitor Overview	IB_MONITOR_OVRVIEW	PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Asynchronous Services	Use this page to ensure that all service operations are set up and active.

See Also

PeopleTools PeopleBook: Integration Broker

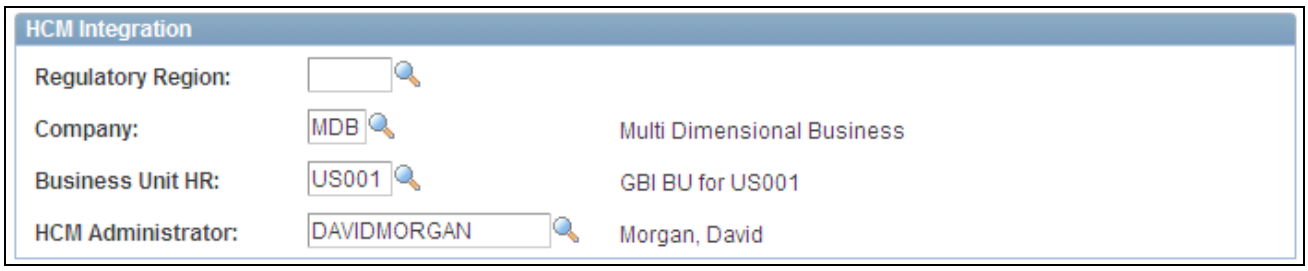
Setting Up Installation Options

Access the Services Procurement Installation Options page (Set Up Financials/Supply Chain, Install, Installation Options, Services Procurement).

HCM Person Integration Enabled Select to enable the integration with HCM for person information. Selecting this option enables basic service provider and work order information to be sent to HCM and HCM Person and then have job-related information sent back to Services Procurement.

Setting Up Business Unit Definitions

Access the Services Procurement Business Unit Definition page (Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Definitions).



HCM Integration group box on the Services Procurement Business Unit Definition page

If you select the HCM Person Integration Enabled check box on the Services Procurement Installation Options page, the HCM Integration group box and relative HCM field values are available on this page.

Regulatory Region Select a regulatory region.

Company Select the company.

Business Unit HR (business unit human resources) Enter the human resource business unit.

HCM Administrator Select the name of the human resource administrator responsible for entering user information in the HCM system. This user might also be responsible for re-submittal of the person or job data to HCM if the initial person or job creation did not go through successfully.

Note. Many of the HCM default values from the Services Procurement Business Unit Definition come from the requisition and work order components.

See Also

Chapter 4, "Setting Up PeopleSoft Services Procurement," Setting Up Business Unit Definitions, page 32

Setting Up Service Operations - Incremental Synchronization

PeopleSoft Services Procurement uses PeopleSoft Integration Broker to integrate PeopleSoft Services Procurement tables with PeopleSoft HCM. The service operations are delivered with a default status of *Inactive.* You must activate each service operation before attempting to publish service operation or subscribe to service operations between databases. You must activate these service operations in the HCM and SCM databases.

To begin using PeopleSoft Integration Broker, you must enable the publishing of service operations in PeopleSoft HCM and SCM and the subscribing to those service operations in PeopleSoft HCM and SCM. The publish and subscribe rules may also be incremental or full table synchronization for each service operation.

The following table contains the incremental synchronization service operations that update the PeopleSoft Services Procurement applications when you change data in HCM that is relevant to the integration. These service operations are published from HCM.

Note. You must activate these service operations and queues in the PeopleSoft Services Procurement and HCM databases.

Service Operation	*Queue*
DEPT_SYNC	ENTERPRISE_SETUP
DEPT_SYNC_EFF	ENTERPRISE_SETUP
COMPANY_SYNC	PERSON_ISE_SETUP
LOCATION_SYNC_EFF	ENTERPRISESETUP
LOCATION_SYNC	ENTERPR _SETUP
BUS_UNIT_HR_SYNC	HR_SETUP

Service Operation	*Queue*
HCR_ADD_USER_PROFILE	PERSON_SETUP
HCR_ADD_USER_PROFILE_ACK	PERSON_SETUP
JOBCODE_SYNC	PERSON_SETUP
REGULATORY_REGION_SYNC	PERSON_SETUP
ESTAB_TBL_SYNC	PERSON_SETUP
ESTAB_ LOC_US_SYNC	PERSON_SETUP
HR_LABOR_AGRMNT_S	PERSON_SETUP
PERSON_BASIC_SYNC	PERSON_DATA
WORKFORCE_SYNC	PERSON_DATA
USER_PROFILE	USER_PROFILE

After you activate these service operations, subsequent changes to data in any of the records associated with these service operations triggers the publication and subscription of the new or deleted data. As a result, PeopleSoft Services Procurement reflects the change within a few seconds.

These SYNC service operations are published from HCM. You must activate the subscriptions to these service operations in the SCM system in order to update the data in SCM.

See Also

PeopleTools PeopleBook: Integration Broker

Setting Up Service Operations - Full-Table Synchronization

Full-table synchronization is more data-destructive than incremental synchronization. Incremental synchronization service operations modify, delete, or add the data that a user has affected in performing an individual transaction. Full-table synchronization service operations delete all data in the target record first and then loads a copy of the source record.

Full-table synchronization is generally used at the beginning of an implementation to get the data synchronized between databases. After that point, it should be used sparingly.

The following table lists full-table synchronization service operations. You should carefully consider the effect of activating any of these service operations.

Warning! Do not activate any service operations that are identified as FULL_SYNC or FULLSYNC unless you are absolutely certain that you want to overwrite all of the data in the records that are associated with the service operation in the database. Understanding how Full Synchronization Service Operations work is especially important if you have a different list of departments or locations in the Services Procurement database than you have in the HCM database. For example, synchronizing the departments using a FULLSYNC service operation would overwrite all of the Services Procurement departments with the HCM departments.

Note. When using Full Synchronization service operations, the primary concern is that you do not inadvertently overwrite valid data. To prevent this problem, you should generally avoid activating Full Synchronization service operations for any record that receives input from more than one database.

Service Operation	*Queue*
DEPT_FULLSYNC	ENTERPRISE_SETUP
COMPANY_FULLSYNC	PERSON_ISE_SETUP
LOCATION_FULLSYNC_EFF	ENTERPRISESETUP
LOCATION_FULLSYNC	ENTERPR _SETUP
BUS_UNIT_HR_FULLSYNC	HR_SETUP
JOBCODE_FULLSYNC	PERSON_SETUP
REGULATORY_REGION_FULLSYNC	PERSON_SETUP
ESTAB_TBL_FULLSYNC	PERSON_SETUP
ESTAB_ LOC_US_FULLSYNC	PERSON_SETUP
HR_LABOR_AGRMNT_FULLSYNC	PERSON_SETUP

You should activate the following two service operation and service operation subscription to synchronize the setIDs and tableset information from the HCM database to the SCM database.

Service Operation	*Queue*
SETID_INITIALIZE	TBLSET_CONTROL
TBLSET_CONTROL_INITIALIZE	TBLSET_CONTROL

Note. To enable the TBLSET_CONTROL_INITIALIZE service operation to publish between two databases, you must set up message chunking for the operation by record group. This process is described in the next set of steps.

To enable the TBLSET_CONTROL_INITIALIZE service operation to publish between two databases:

1. Identify the record groups that exist in both databases.

2. Create a chunking rule for each record group and then add the chunking definition to the subscribing nodes of the group.

3. Enter the chunking rule you created to the full table publish rules definition for the TBLSET_CONTROL_INITIALIZE service operation.

If you are publishing to one node, this setup is sufficient; however, if you are publishing to multiple nodes, you need to add routing PeopleCode to the channel.

See "Using the Publish Utility", Message Chunking, *PeopleSoft FSCM 9.1 PeopleBook: Integration Interfaces.*

See Also

PeopleTools PeopleBook: Integration Broker

Activating Full-Table Publish Rules

Full-table service operations in PeopleSoft Integration Broker are delivered with a status of *Inactive.* The publishing rules must be activated. When the appropriate service operations are activated, information that is shared by the SCM, and PeopleSoft HCM databases is updated properly.

For example, PeopleSoft publishes (Full Table Publish) data from HCM. Table BUS_UNIT_TBL_HR is populated with new data from PeopleSoft HCM, and all old data is deleted. The data from this table is published in the service operation BUS_UNIT_HR_FULLSYNC.

You should activate the service operation and routings in both the HCM and SCM databases to enable the integration. Use these service operations to send the service provider information from the SCM database to the HCM database:

Service Operation	*Queue*
HCR_ADD_PERSON This service operation is published from SCM to HCM when a work order is released. The service operation contains the service providers personal information that is required by HCM for creating an HCM person. The service operation also contains job information for creating a job assignment in HCM.	PERSON_DATA
HCR_ADD_PERSON_ACK This service operation is published from HCM after processing the HCR_ADD_PERSON service operation. This acknowledgement service operation contains information of whether the HCM person, job and user profile have been created in HCM.	PERSON_DATA

Service Operation	*Queue*
HCR_ADD_JOB This service operation is published from SCM when a service provider who is currently associated to a work order is also associated to another work order. This service operation contains job information for creating a job assignment in HCM.	PERSON_DATA
HCR_ADD_JOB_ACK This service operation is sent from HCM after processing the HCR_ADD_JOB message. This service operation contains info of whether the job assignment was created in HCM.	PERSON_DATA
HCR_ADD_USER_PROFILE This service operation from Services Procurement to HR requests the creation of a user profile. The message structure includes the existing records HCR_JOB_WK and HCR_HANDLE_WK. It can be copied from the existing message HCR_ADD_JOB, with only one field active on the HCR_JOB_WK record: Employee ID.	PERSON_DATA
HCR_ADD_USER_PROFILE_ACK This service operation is identical to the existing HCR_ADD_JOB_ACK and HCR_ADD_PERSON_ACK acknowledgement messages.	PERSON_DATA
HCR_CAN_JOB This service operation is published from SCM when a work order is canceled, closed or terminated. This service operation contains the job information for terminating the job assignment in HCM.	PERSON_DATA

See Also

PeopleTools PeopleBook: Integration Broker

Registering Enterprise Administrators, Approvers, Requesters, and Service Coordinators

The following list details the required steps for registering administrators, approvers, requesters, and service coordinators.

1. The enterprise administrator registers the user in the HCM database.

   The HCM system creates a new HCM person of type *Employee*.

2. The enterprise administrator creates an operator login profile for the user.

   Note. The new user employee ID is associated with the operator login profile.

3. The PERSON_BASIC_SYNC service operation publishes the person and job assignment information from the HCM database to the SCM database.

   The USER_PROFILE service operation publishes the user profile information from the HCM database to the SCM database.

4. The enterprise administrator registers the new user in the PeopleSoft Services Procurement application.

5. For service coordinators, the service procurement person ID is associated to the user profile. In SCM, the required roles are associated to the users when they are added as administrators, approvers, requestors or service coordinators

Registering Service Provider Contacts

The service provider contact is a supplier person of interest user that does not require registration in the HCM database.

Registering Service Providers

The following list details the required steps for registering a service provider.

Note. The HCM Integration option must be enabled to complete this process effectively.

1. The enterprise or supplier administrator registers the service provider in the PeopleSoft Services Procurement application.

   After the service provider is successfully registered, the system creates a unique Services Procurement Person ID.

2. After a service provider is registered with his own unique Person ID, the service provider contact sources the candidate, the candidate qualifies and accepts the position, and then the work order is created and approved.

3. After a work order is released, the SCM system sends the service provider information to HCM to create an HCM person of type *Contingent Worker*.

   This information is sent to HCM in the form of an asynchronous service operation.

4. In HCM, a new HCM person entry and login profile is created for the service provider.

5. The Services Procurement application receives a response back from HCM.

   This information includes, but is not limited to the HCM employee ID, Work Order Business Unit, Work Order ID, and the Services Procurement person ID.

6. Services Procurement stores the HCM employee ID as a cross-reference in the SCM database.

7. The PERSON_BASIC_SYNC and WORKFORCE_SYNC service operations synchronize the person and job assignment information from the HCM database to the SCM database.

   The USER_PROFILE service operation synchronizes the user profile information from the HCM database to the SCM database. When creating the user profile, the HCM system uses the employee ID as the user ID and password. The user has the option of changing the password when they log in into Services Procurement.

The following service provider data is sent to the HCM database from the SCM database using asynchronous service operations:

- Services Procurement Person ID
- First Name
- Middle Name
- Last Name
- Person Organization
- Email ID
- Primary Phone Number

The following job data information is also sent to the HCM database from the SCM database:

- Work Order Business Unit
- Work Order ID
- Sequence Number
- Effective Date
- Employee ID
- Regulatory Region
- Company
- Business Unit
- Department
- Location
- Job Code
- Establishment
- Labor Agreement

After data is received and processed in the HCM database, the following information is sent back to SCM from the HCM database using the PERSON_BASIC_SYNC and USER_PROFILE service operations:

- Services Procurement Person ID
- Work Order Business Unit

- Work Order ID
- HCM Employee ID
- Employee Record Number
- Sequence Number

Note. After an administrator registers a service provider in PeopleSoft Services Procurement, all updates to personal data must be performed in the HCM database.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Users and Team Setup, page 125

Using the Service Operations Monitor

Use the Services Operations Monitor menu to ensure that all service operations are set up and active. You can also use this menu to monitor asynchronous and synchronous service operations.

See Also

PeopleTools PeopleBook: Integration Broker

Setting Up PeopleSoft Talent Acquisition Manager and Services Procurement Integration

This section provides an overview of PeopleSoft Talent Acquisition Manager and Services Procurement integration and discusses how to:

- Set up installation options.
- View the PeopleSoft Talent Acquisition Manager and Services Procurement integration process flow.
- View service operations.

Understanding the PeopleSoft Talent Acquisition Manager and Services Procurement Integration

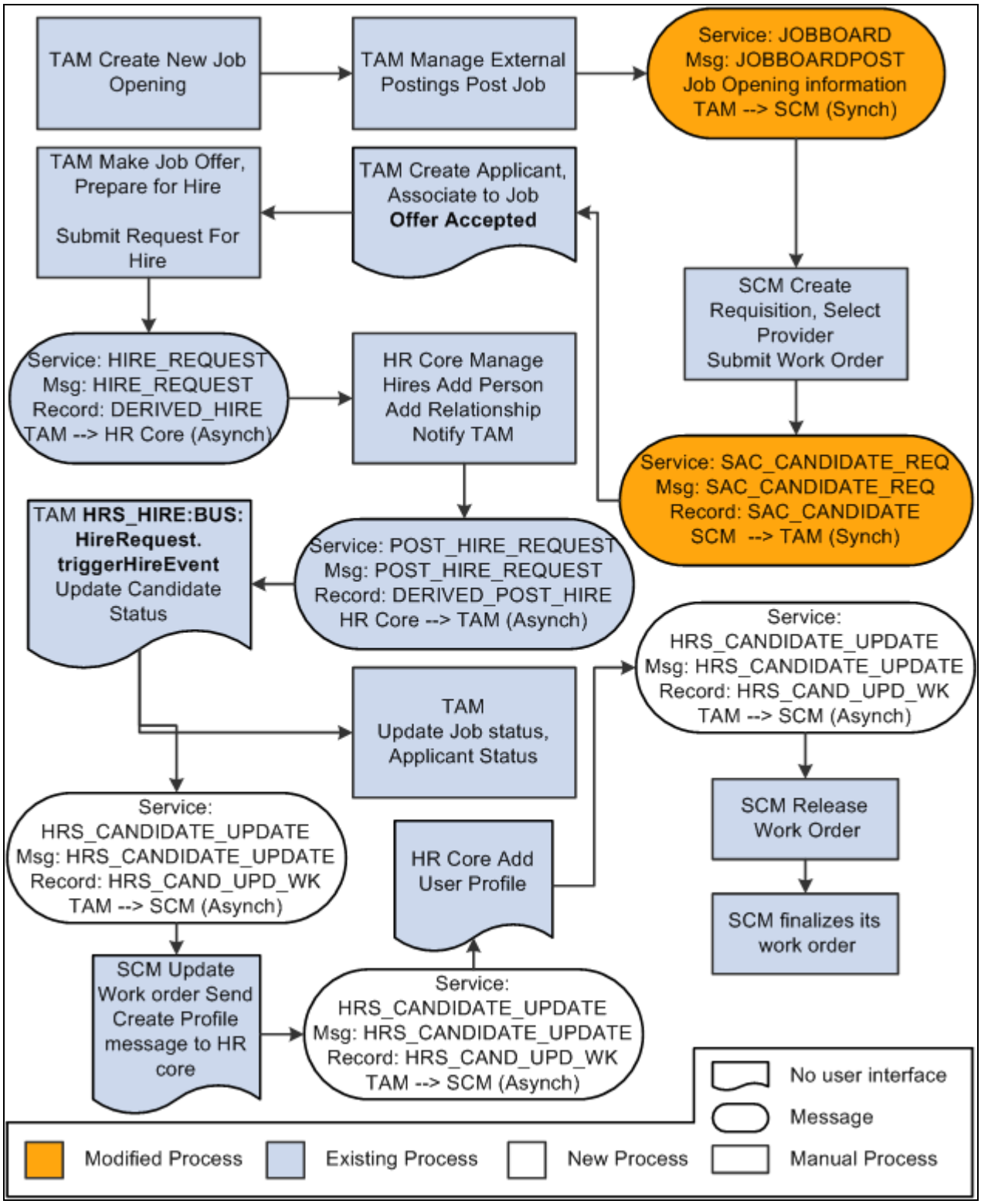
When you implement both the PeopleSoft Services Procurement and Talent Acquisition Manager applications, you can create a job opening in the Talent Acquisition Manager and post the job to Services Procurement for fulfillment. When you select the eRecruit Integration Enabled check box on the Services Procurement Installation Options page, users can create a job posting in Talent Acquisition Manager and post the job to Services Procurement with pre-populated data that you can use to create, approve, source, and fulfill the requisition, create a work order, and send the candidate information back to Talent Acquisition Manager for further processing.

With this integration, you can send messages back and forth between the two applications by using PeopleTools Integration Broker to support the following activities:

- Create a PeopleSoft Talent Acquisition Manager job requirement and post it to Services Procurement to find a suitable candidate.
- Unpost a posted job from Talent Acquisition Manager enabling the cancellation of the Services Procurement requisition.
- Send candidate information from Services Procurement to Talent Acquisition Manager after work order approval.
- Send candidate confirmation from Talent Acquisition Manager to Services Procurement after on boarding process is complete.

User profile integration enables you to trigger the user profile creation request from Services Procurement to Human Resources. The request is sent from Services Procurement to Human Resources when the Services Procurement candidate is hired for a Talent Acquisition Manager job opening. When a Services Procurement candidate is hired, Talent Acquisition Manager will send a message to Services Procurement indicating that the candidate has been hired. On successful validation that the candidate has been hired, Services Procurement will send a message to Human Resources to request the creation of a user profile for the newly hired person. Human Resources will create the user profile and send an acknowledgement message back to Services Procurement.

The next example illustrates how the three applications exchange messages when you create a new job opening in the PeopleSoft Talent Acquisition Manager application for use with a Services Procurement requisition:



Messages exchanged during HCM and Service Procurement integration

The exchange of messages is described in these steps:

1. Talent Acquisition Manager initiates the integration by posting a job using the JOBBOARDPOST message to Services Procurement.

2. Services Procurement directs the Talent Acquisition Manager user to the Services Procurement requisition page for creating the requisition.

   The requisition is pre-populated with data from the Talent Acquisition Manager job opening.

3. Services Procurement sources and fills the requisition with the most suitable candidate and creates a work order.

4. When the work order is approved, Services Procurement sends the SAC_CANDIDATE_REQ message to Talent Acquisition Manager.

   This message contains the job posting ID for which the candidate information is being sent.

5. Talent Acquisition Manager processes the incoming candidate information, creates an applicant and fills the job opening.

   Talent Acquisition Manager then initiate the Prepare for Hire process to hire the candidate in the Human Resources application. Human Resources hires the candidate as a contingent worker, creates a person and job assignment and sends the POST_HIRE_REQUEST message to Talent Acquisition Manager. This message contains the candidate's employee ID and job assignment number.

6. Talent Acquisition Manager sends the HRS_CANDIDATE_UPDATE message to Services Procurement indicating that the candidate has been hired.

   The message contains the employee ID and the job assignment number along with the Services Procurement business unit, work order ID, and the person ID of the service provider.

7. Services Procurement stores the employee ID and job assignment number as a reference and sends the HCR_ADD_USER_PROFILE message to request Human Resources to create a user profile for the newly hired service provider.

8. Human Resources creates the user profile and sends the HCR_ADD_USER_PROFILE_ACK message to Services Procurement indicating the creation of the user profile.

When PeopleSoft Services Procurement fills a Talent Acquisition Manager job opening with a service provider, Services Procurement sends the candidate message to Talent Acquisition Manager. The candidate message is sent regardless of whether the service provider is a new service provider or the service provider already has an existing Talent Acquisition Manager applicant ID.

The next table describes possible data variations in the Service Procurement message and the response by Talent Acquisition Manager and Human Resources:

Data Included in Services Procurement Message to Talent Acquisition Manager	***Talent Acquisition Manager Action***	***Human Resources Action***	***Comments***
Human Resources employee ID is blank. Talent Acquisition Manager applicant ID is blank.	Talent Acquisition Manager creates a new external applicant record. The Talent Acquisition Manager recruiter initiates the hire, *Type = Add Contingent Worker*.	Adds a new person record with the *Organization Relationship = Contingent Worker* and creates a job. Sends message to Talent Acquisition Manager and Services Procurement to confirm the hire and provides Talent Acquisition Manager the employee ID, employment record number.	This is the basic use case.
Talent Acquisition Manager applicant ID is not blank and employee ID is not blank.	Not applicable Talent Acquisition Manager associates the applicant ID to the job opening by filling the open position and initiating the hire request.	Human Resources adds a new job as the applicant has an existing employee ID and sends a message to Talent Acquisition Manager to confirm the hire and provides Talent Acquisition Manager with the employment record number.	The Services Procurement service provider is an existing Talent Acquisition Manager applicant and has a person record with a valid employee ID in Human Resources.

PeopleSoft Services Procurement sends an add assignment message when a service provider with a current assignment accepts an additional assignment and when a terminated service provider accepts a new assignment with the organization. In these scenarios, PeopleSoft Talent Acquisition Manager always receives the Human Resource employee ID assigned to the service provider. The next table describes possible conditions for the message:

Data Included in Services Procurement Message to Talent Acquisition Manager	***Talent Acquisition Manager Action***	***Human Resources Action***	***Comments***
Human Resources employee ID is blank Talent Acquisition Manager applicant ID is blank	Talent Acquisition Manager creates a new external applicant record. The Talent Acquisition Manager recruiter initiates the hire, *Type = Add Contingent Worker*.	Adds a new person record with the *Organization Relationship = Contingent Worker* Sends message to Talent Acquisition Manager and Services Procurement to confirm the hire and provides Human Resources the employee ID, employment record number.	This can happen if the contingent worker (CWR) record was set up through direct integration with the Human Resources application. In this case, Services Procurement does not have a Talent Acquisition Manager applicant ID.

Data Included in Services Procurement Message to Talent Acquisition Manager	*Talent Acquisition Manager Action*	*Human Resources Action*	*Comments*
Talent Acquisition Manager applicant ID is not blank.	Talent Acquisition Manager uses the applicant ID provided by Services Procurement.	Adds an additional assignment (new employment record number) for the employee ID. Sends message to Talent Acquisition Manager and Services Procurement to confirm the hire and provide the new employment record number.	None
Talent Acquisition Manager applicant ID is not in an Active status.	Create a new external applicant ID.		The applicant ID may have been inactivated during an applicant merge process.

See *PeopleSoft HRMS Application Fundamentals 9.1 PeopleBook*

Pages Used to Set Up PeopleSoft Talent Acquisition Manager and Services Procurement Integration

Page Name	*Definition Name*	*Navigation*	*Usage*
Services Procurement Installation Options	INSTALLATION_SP	Set Up Financials/Supply Chain, Install, Installation Options, Services Procurement	Define PeopleSoft Services Procurement installation options.
Create Requisition	SPF_REQ_INFO_PG	Services Procurement, Create Requisition	Enter basic service requisition information.
Services	IB_SERVICEDEFN	PeopleTools, Integration Broker, Integration Setup, Services	Define services.
Service Operations	IB_SERVICE	PeopleTools, Integration Broker, Integration Setup, Services Operations	Define service operations and associate them to services.
Routing Definitions	IB_ROUTINGDEFN	PeopleTools, Integration Broker, Integration Setup, Routings	Define routings associated with service operations.
Queue Definitions	IB_QUEUEDEFN	PeopleTools, Integration Broker, Integration Setup, Queues	Define queues to be used with the PeopleSoft Talent Acquisition Manager integration.

Page Name	Definition Name	Navigation	Usage
Monitor Overview	IB_MONITOR_OVRVIEW	PeopleTools, integration Broker, Service Operations Monitor, Monitoring, Asynchronous Services	Use this page to ensure that all service operations are set up and active.

Setting Up Installation Options

Access the Services Procurement Installation Options page (Set Up Financials/Supply Chain, Install, Installation Options, Services Procurement).

See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Defining Services Procurement Installation Options.

eRecruit Integration Enabled Select to enable the integration with Talent Acquisition Manager. When you select this check box all requisitions created in the Talent Acquisition Manager application are passed to Services Procurement for fulfillment.

HCM Node Name Enter the HCM node location where the work order service operation is sent.

HCM Person Integration Select to enable the integration with HCM for person information. When you select this option, basic person and job data is synchronized between the HCM and Services Procurement systems.

Viewing the PeopleSoft Talent Acquisition Manager and Services Procurement Integration Process Flow

The following sections describe the process flow for PeopleSoft Talent Acquisition Manager and Services Procurement integration.

Job Posting Process

The following steps outline the job posting process:

1. User creates a job posting in Talent Acquisition Manager and sends that data to the Services Procurement application.

   The JOBBOARDPOST service operation is used to send the job opening information to Services Procurement.

2. . The SCM Integration Broker receives the JOBBOARDPOST message, and transforms it into data that Services Procurement can process.

3. Services Procurement examined the service operation for the authentication data originally sent in the HR-XML envelope.

   If authenticated, the system generates a unique identifier *HOLDING_ID* and inserts data from the JOB_POSTING service operation into the Job Posting table.

4. A URL that points to the Services Procurement requisition is generated, which includes the HOLDING_ID identifier.

   The URL is added to the response.

5. HCM receives the response XML, extracts the Services Procurement URL, and creates a new browser window that points to the URL.

6. Services Procurement requisition process examines the unique identifier and then loads matching data from the holding table into the appropriate fields on the requisition.

7. The user completes the requisition, submits it for approval, and continues with the fulfillment process from within Service Procurement.

Note. You can also sent updates from Talent Acquisition Manager to Services Procurement to modify or cancel job posting that were sent previously.

Work Order Process

After a requisition is filled and a related work order is generated, the following steps outline the work order process:

1. The work order is approved, and the Work Order process begins.

   This process is manually started by the service coordinator.

2. The SAC_CANDIDATE_REQ service operation is triggered and contains the information from the current work order.

   This service operation is sent asynchronously to Talent Acquisition Manager.

3. The SCM Integration Broker receives the SAC_CANDIDATE_REQ service operation and converts it into the HR-XML *Candidate* format.

4. Talent Acquisition Manager receives the Candidate XML service operation and creates the applicant or associates the applicant to the job opening.

   Talent Acquisition Manager sends the HRS_CANDIDATE_UPDATE message back to Services Procurement indicating whether the service provider was filled for the job opening in TAM.

5. Talent Acquisition Manager initiates the prepare for hire process and Human Resources processes the hire request.

   After the on boarding process is complete in Human Resources, Talent Acquisition Manager sends the HRS_CANDIDATE_UPDATE service operation to Services Procurement indicating the hiring status.

6. Services Procurement updates the work order with the employee ID and the employee record number and releases the work order.

Viewing Service Operations

When the system transfers you to the Services Procurement requisition, you can view the requisition fields populated with the data from Talent Acquisition Manager.

The following table lists the mappings of the Position Opening XML from Resource Management to Services Procurement.

Talent Acquisition Manager Position Opening Element Name	***Services Procurement Field Label***
PositionProfile.ProfileId.IdValue	Job Code
PositionProfile.PositionDetail.Competency.NumericValue	Experience
PositionProfile.PositionDetail.Competency.CompetencyEvidence. EvidenceId.id	Educational Level
PositionProfile.PositionDetail.Competency.name	Competencies
PositionProfile.PositionDetail.RemunerationPackage.BasePay.currencyCode	Currency
PositionProfile.PositionDateInfo.ExpectedEndDate	End Date
PositionProfile.PositionDetail.PositionTitle	Job Title
PositionProfile.PositionDetail.PhysicalLocation.Name	Location
PositionProfile.PositionDetail.RemunerationPackage.BasePay.BasePayAmountMax	Rate
PositionProfile.PositionDetail.FormattedPositionDescription.Value	Scope of Work
PositionProfile.PositionDetail.PositionTitle	Service
PositionProfile.PositionDetail.JobCategory.CategoryCode	Service Type
PositionProfile.PositionDateInfo.StartDate	Start Date
PositionProfile.PositionDetail.RemunerationPackage.BasePay.baseInterval	Unit of Measure

The following table lists the mappings from the Service Procurement tables (work order, service provider, and related tables) to the Candidate XML service operation for Talent Acquisition Manager.

Services Procurement Record	***Services Procurement Field Label***	***Talent Acquisition Manager Candidate Element Name***
NA	JobOpeningID	RelatedPositionPostings.PositionPosting.Id.IdValue.name
PV_EXT_XREF_HDR	KEY1FLDVAL	RelatedPositionPostings.PositionPosting.Id.IdValue
SPF_WORDERREC	JOB_TITLE	RelatedPositionPostings.PositionPosting.Id.Title
SPB_PERSON_TBL	FIRST_NAME	Resume.StructuredXMLResume.ContactInfo.PersonName.GivenName

Services Procurement Record	***Services Procurement Field Label***	***Talent Acquisition Manager Candidate Element Name***
SPB_PERSON_TBL	MIDDLE_NAME	Resume.StructuredXMLResume.ContactInfo.PersonName.MiddleName
SPB_PERSON_TBL	LAST_NAME	Resume.StructuredXMLResume.ContactInfo.PersonName. FamilyName
SPB_PERSON_TBL	TITLE	Resume.StructuredXMLResume.ContactInfo.PersonName.Affix
NA	familyNamePrefix	Resume.StructuredXMLResume.ContactInfo.PersonName.Affix.type
SPB_PERS_PHONE	COUNTRY_CODE (where PHONE_TYPE=Home)	Resume.StructuredXML.Resume.ContactInfo.PersonName.ContactMethod.Telephone.InternationalCountryCode
SPB_PERS_PHONE	PHONE (where PHONE_TYPE=Home)	Resume.StructuredXMLResume.ContactInfo.PersonName.ContactMethod.Telephone.SubscriberNumber
SPB_PERS_PHONE	COUNTRY_CODE (where PHONE_TYPE=Cellular)	Resume.StructuredXML.Resume.ContactInfo.PersonName.ContactMethod.Mobile.InternationalCountryCode
SPB_PERS_PHONE	PHONE(where PHONE_TYPE=Cellular)	Resume.StructuredXMLResume.ContactInfo.PersonName.ContactMethod.Mobile.SubscriberNumber
SPB_PERS_PHONE	COUNTRY_CODE(where PHONE_TYPE=FAX)	Resume.StructuredXML.Resume.ContactInfo.PersonName.ContactMethod.FAX.InternationalCountryCode
SPB_PERS_PHONE	PHONE(where PHONE_TYPE=FAX)	Resume.StructuredXMLResume.ContactInfo.PersonName.ContactMethod.FAX.SubscriberNumber
SPB_PERS_EMAIL	EMAIL_ADDR	Resume.StructuredXMLResume.ContactInfo.PersonName.ContactMethod.InternetEmailAddress

Appendix D

Delivered Workflows for PeopleSoft Services Procurement

This appendix discusses delivered workflows for PeopleSoft Services Procurement.

See Also

PeopleTools PeopleBook: PeopleSoft Workflow

PeopleTools PeopleBook: PeopleSoft Applications User's Guide

Delivered Workflows for PeopleSoft Services Procurement

This section discusses PeopleSoft Services Procurement workflows. The workflows are listed alphabetically by workflow name.

Bid Forwarded to Requester

The section discusses the Bid Forwarded to Requester workflow.

Description

Event Description	The service coordinator sends a bid response to the requester.
Action Description	The service coordinator sends the requester a candidate to consider.
Notification Method	Worklist, email.

Workflow Objects

Component	SPF_CBID_RSP_COMP
Role	Requester
Email Template	SCTOREQBID

Bid Response from Requester

The section discusses the Bid Response from Requester workflow.

Description

Event Description	The requester sends a bid response to a service coordinator.
Action Description	Notifies internal service coordinator that the requester has reviewed the bid. Notifies external service coordinator that the requester has reviewed the bid.
Notification Method	Worklist, email.

Workflow Objects

Component	SPF_RBID_RSP_COMP
Role	Service coordinator (internal) Service coordinator (external)
Email Template	FREQTSC FREQTSC_E

See Also

Chapter 17, "Assessing and Awarding Bids," page 395

Bid Retracted After Submission

The section discusses the Bid Retracted After Submission workflow.

Description

Event Description	The service provider contact selects to withdraw a bid submission before the service coordinator or requester responds to the bid.
Action Description	Notifies the service coordinator and requester, when needed, that the bid has been withdrawn.
Notification Method	Worklist, email.

Workflow Objects

Component	SPF.BID_WRK.SPF_RETRACT_SUBMTL
Role	Service coordinator
Email Template	SPF_RETRACT_SUBMITTAL

Bid Submitted

The section discusses the Bid Submitted workflow.

Description

Event Description	The service provider or service provider contact submits a bid on a requisition or work order.
Action Description	Notifies the service coordinator that a bid has been submitted for a requisition line or work order. Notifies a service coordinator that a service provider has entered a response for a bid on a requisition or work order.
Notification Method	Worklist, email.

Workflow Objects

Component	SPF_BID SPF_BIDRESPONSE SPF_SUBMITTAL
Role	Service coordinator (internal employee) Service coordinator (external)
Email Template	S_RESPN_E S_RESPONSE CONBID CONBID_E

Communication Ended

The section discusses the Communication Ended workflow.

Description

Event Description	The requester sends a bid response to the service coordinator with the bid action of *End Communication.* The service coordinator sends a bid response to the requester with the bid action of *End Communication.* The service coordinator sends a bid response to the service provider contact with the bid action of *End Communication.* The service provider contact sends a bid response to the service coordinator with the bid action of *End Communication.*
Action Description	Notifies the service coordinator that communication has ended for this bid. Notifies the requester that communication has ended for this bid. Notifies the service provider contact that communication has ended for this bid. Notifies the service coordinator that communication has ended for this bid.
Notification Method	Email.

Workflow Objects

Component	SPF_CBID_RSP_COMP
Role	Service coordinator Requester Service provider contact Service coordinator
Email Template	ECREQTOSC ECSCTOREQ ECSCTOSPC ECSPCTOSC

Final Approval

The section discusses the Final Approval workflow.

Description

Event Description	The task is approved or denied.
Action Description	The requester is informed of the action taken.

Notification Method	Worklist, email.

Workflow Objects

Component	SAC_AW_ROUTE
Role	Requester
Email Template	WO_On_Final_Approval

Interview Canceled

The section discusses the Interview Canceled workflow.

Description

Event Description	A scheduled interview is canceled.
Action Description	Notifies interviewer that the interview has been canceled.
Notification Method	Email. **Note.** The Send Email check box must be selected for the interviewer to be notified.

Workflow Objects

Component	SPF_INTERVIEW_SCHD
Role	Interviewer
Email Template	INTRVREMVD

Interview Rescheduled

The section discusses the Interview Rescheduled workflow.

Description

Event Description	A scheduled interview is rescheduled and the send email check box is selected.
Action Description	Notifies interviewer that the interview has been rescheduled.

Notification Method	Email (only when the send email check box is selected).

Workflow Objects

Component	SPF_INTERVIEW_SCHD
Role	Interviewer
Email Template	INTRVRESCH

Interview Scheduled

The section discusses the Interview Scheduled workflow.

Description

Event Description	An interview is scheduled for a bid.
Action Description	Notifies interviewer that he or she is scheduled to interview a candidate.
Notification Method	Worklist, email (only when the send email check box is selected).

Workflow Objects

Component	SPF_INTERVIEW_SCHD
Role	Service provider (email only), interviewer (worklist and email).
Email Template	INTERVIEW

Invoice Approved by Internal Approver

The section discusses the Invoice Approved by Internal Approver workflow.

Description

Event Description	Invoice is approved by the internal invoice approver.
Action Description	Notifies the invoice manager that the invoice has been approved by the internal invoice approver.
Notification Method	Email.

Workflow Objects

Component	SPF_INV_APPROVE
Role	Invoice manager
Email Template	SP_IVAPR

See Also

Chapter 22, "Managing Settlements," page 559

Invoice Approved by Supplier

The section discusses the Invoice Approved by Supplier workflow.

Description

Event Description	Invoice is approved by the supplier invoice approver.
Action Description	Notifies the internal invoice approver that the supplier has approved the invoice.
Notification Method	Email.

Workflow Objects

Component	SPF_INV_APPROVE
Role	Internal invoice approver
Email Template	SP_IVABS

Invoice Rejected by Internal Approver

The section discusses the Invoice Rejected by Internal Approver workflow.

Description

Event Description	Invoice is rejected by the internal invoice approver.
Action Description	Notifies the invoice manager that the invoice has been rejected by the internal invoice approver.

Notification Method	Email.

Workflow Objects

Component	SPF_INV_APPROVE
Role	Invoice manager
Email Template	SP_IVREJ

Invoice Rejected by Supplier

The section discusses the Invoice Rejected by Supplier workflow.

Description

Event Description	Invoice is rejected by the supplier invoice approver.
Action Description	Notifies the invoice manager that the supplier has rejected the invoice.
Notification Method	Email.

Workflow Objects

Component	SPF_INV_APPROVE
Role	Invoice manager
Email Template	SP_IVRBS

Invoice Submitted for Approval

The section discusses the Invoice Submitted for Approval workflow.

Description

Event Description	Invoice is submitted for approval.
Action Description	Notifies invoice manager that an invoice has been submitted for approval. Notifies internal invoice approver that an invoice has been submitted for approval.

Notification Method	Email (invoice manager). Worklist, email (internal invoice approver).

Workflow Objects

Component	SPF_INV_APPROVE
Role	Invoice manager Internal invoice approver
Email Template	SP_IVS2E (invoice manager) SP_IVSUB (internal invoice approver)

Requisition Approved

The section discusses the Requisition Approved workflow.

Description

Event Description	A requisition is approved.
Action Description	Notifies a service coordinator that a requisition has been approved and is ready to be sourced. Notifies a service coordinator that a requisition is approved and ready for bid submittal.
Notification Method	Worklist, email.

Workflow Objects

Component	SPF_REQ_LN_STTS (service coordinator—external, service coordinator—internal employee) SPF_SOURCE_CMP (service coordinator)
Role	Service coordinator (external) Service coordinator (internal employee)
Email Template	REQAPPROVE REQAPR_E SOURCING

See Also

Chapter 14, "Creating and Managing Services Procurement Requisitions," page 285

Requisition Canceled

The section discusses the Requisition Canceled workflow.

Description

Event Description	A requisition is canceled.
Action Description	Notifies service provider contacts that the requisition has been canceled.
Notification Method	Worklist, email.

Workflow Objects

Component	SPF_REQ_LN_STTS
Role	Service provider contact
Email Template	CANCEL

Requisition Filled

The section discusses the Requisition Filled workflow.

Description

Event Description	The service coordinator fills the requisition.
Action Description	Notifies the requester and the service coordinator (if the service coordinator can create work orders) that the position on the requisition was filled. Click to generate a work order so that the service provider can record time and expenses.
Notification Method	Worklist, email.

Workflow Objects

Component	SPF_CBID_RSP_COMP

Role	Requester, service coordinator Service provider contact
Email Template	REQFILLED (requester, service coordinator) FILLED (service provider contact)

Requisition Reassigned

The section discusses the Requisition Reassigned workflow.

Description

Event Description	A requisition is reassigned.
Action Description	Notifies an external service coordinator that a requisition has been reassigned to him or her and is ready for sourcing. Notifies an internal service coordinator that a requisition has been reassigned to him or her and is ready for sourcing.
Notification Method	Email.

Workflow Objects

Component	SPF_SOURCE_CMP
Role	Service coordinator (external) Service coordinator (internal employee)
Email Template	REASSIGN (service coordinator—external) REASSIGN_E (service coordinator—internal employee)

Respond to Supplier Bid

The section discusses the Respond to Supplier Bid workflow.

Description

Event Description	The service coordinator sends a bid response to the service provider contact.
Action Description	Notifies the service provider contact that the service coordinator has responded to a bid.
Notification Method	Worklist, email.

See Chapter 8, "Setting Up PeopleSoft Services Procurement Workflow," Configuring the Workflow System, page 229.

See Chapter 15, "Managing PeopleSoft Services Procurement Sourcing," page 339.

Workflow Objects

Component	SPF_CLIBID_COMP
Role	Service provider contact
Email Template	C_RESPONSE

Service Provider Registered

The section discusses the Service Provider Registered workflow.

Description

Event Description	The service provider is registered.
Action Description	Notifies the administrator that a service provider needs a user profile.
Notification Method	Email.

Workflow Objects

Component	SPF_MANAG_REQ_LINE
Role	Administrator
Email Template	REGSRVCPRO

Suggest Vendor Notification

The section discusses the Suggest Vendor Notification workflow.

Description

Event Description	The requester creates a requisition with suggested vendors.
Action Description	Notifies the administrator of suggested vendors that need to be added to the system.
Notification Method	Email.

Workflow Objects

Component	SPF_REQ_LINE
Role	Administrator
Email Template	SUG_VENDOR

Work Order Auto Task Notify

The section discusses the Work Order Auto Task Notify workflow.

Description

Event Description	A work order is created.
Action Description	Notifies users that work order tasks have been assigned to them.
Notification Method	Email.

Workflow Objects

Component	SPF_WORK_ORDER_CMP
Role	Configurable
Email Template	WO_A_TASK

See Also

Chapter 18, "Managing Work Orders," page 413

Work Order Canceled

The section discusses the Work Order Canceled workflow.

Description

Event Description	A work order is canceled.
Action Description	Notifies the service provider contact that a work order has been canceled.

Notification Method	Email.

Workflow Objects

Component	SPF_WORK_ORDER_CMP
Role	Service provider contact
Email Template	WO_CAN_3 (work orders with requisitions) WO_CAN_2 (work orders without requisitions)

Work Order Created

The section discusses the Work Order Created workflow.

Description

Event Description	A work order is created.
Action Description	Notifies the service coordinator that a work order has been created.
Notification Method	Email.

Workflow Objects

Component	SPF_WORK_ORDER_CMP
Role	Service coordinator
Email Template	WO_CREATE

Work Order Extension

The section discusses the Work Order Extension workflow.

Description

Event Description	The service coordinator or requestor extends a work order.
Action Description	Notifies the service provider that the work order has been extended.
Notification Method	Email.

Workflow Objects

Component	SPF_WORK_ORDER_CMP
Role	Service provider
Email Template	WO_EXTEND

Work Order Reassign

The section discusses the Work Order Reassign workflow.

Description

Event Description	The service coordinator reassigns a work order.
Action Description	Notifies the originally assigned user that the work order has been reassigned. Notifies the newly assigned user that the work order has been reassigned.
Notification Method	Email.

Workflow Objects

Component	SPF_WORK_ORDER_CMP
Role	Assigned users
Email Template	WO_REASSIG (previously assigned user) WO_REASSIGN (newly assigned user)

Work Order Release

The section discusses the Work Order Release workflow.

Description

Event Description	The service coordinator or requester releases a work order.
Action Description	Notifies the service provider or service provider contact that the work order has been released and time or progress can be recorded against the work order.
Notification Method	Email.

Workflow Objects

Component	SPF_WORK_ORDER_CMP
Role	Service provider, service provider contact
Email Template	WO_RELEASE

Work Order Task Assigned

The section discusses the Work Order Task Assigned workflow.

Description

Event Description	A work order is closed.
Action Description	Notifies users that off boarding tasks have been assigned to them.
Notification Method	Email.

Workflow Objects

Component	SPF_WO_APPR_CMP SPF_WO_TASK_CHKLST
Role	Assigned user
Email Template	TASK_EM WO_TASK

Work Order Approved

The section discusses the Work Order Approved workflow.

Description

Event Description	A work order is approved.
Action Description	Notifies the work order requester that the work order was approved.
Notification Method	Email.

Workflow Objects

Component	SPF_WORK_ORDER_CMP
Role	Requester
Email Template	WO_APPROVE

Work Order Survey

The section discusses the Work Order Survey workflow.

Description

Event Description	A survey is sent to recipient.
Action Description	Notifies survey recipient that a work order survey is submitted and requires completion.
Notification Method	Worklist, Email.

Workflow Objects

Business Process	SPF_WORKORDER_BP
Activity	SPF_WO_SEND_SURVEY
Component	SP_SUR_FILL
Role	Work order creator, requester, service coordinator, service team members, requisition approver, work order approver, progress log approver, time approver, expense approver and invoice approver.
Email Template	WO_SNDSURR WO_SNDSURD

Work Order Survey Canceled

The section discusses the Work Order Survey Canceled workflow.

Description

Event Description	A survey is canceled.

Action Description	Notifies survey recipient that a work order survey is canceled.
Notification Method	Email

Workflow Objects

Business Process	SPF_WORKORDER_BP
Activity	SPF_WO_CANC_SUR_EM
Component	SPF_WORK_ORDER_CMP
Role	Work order creator, requester, service coordinator, service team members, requisition approver, work order approver, progress log approver, time approver, expense approver and invoice approver.
Email Template	WO_CNLSUR

Work Order Threshold Alerts

The section discusses the Work Order Threshold Alerts workflow.

Description

Event Description	A work order reaches a specific pre-defined consumption or target date threshold.
Action Description	Notifies all work order threshold distribution list users that the work order consumption percentage has reached the target percentage. Also sends a notification to users a number of days before and after a specific event occurs.
Notification Method	Worklist, email.

Workflow Objects

Business Process	SPF_WORKORDER_BP
Activity	SPF_WO_ALERT_BY_DT, SPF_WO_ALERT_BY PER
Component	SPF_WORK_ORDER_CMP
Role	Work order creator, requester, service coordinator, service team members, requisition approver, work order approver, progress log approver, time approver, expense approver and invoice approver.
Email Template	Uses message catalog text, no template used.

Appendix E

PeopleSoft Services Procurement Reports

This appendix provides a summary table with a general description of the PeopleSoft Services Procurement standard reports.

Note. For samples of these reports, see the PDF files published on CD-ROM with the documentation (for online users) or *PeopleSoft Services Procurement Reports* (for hardcopy users).

In addition to the standard reports, we also provide reporting tools that you can use to create new reports.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

PeopleSoft Services Procurement Reports: General Description

This table lists the PeopleSoft Services Procurement reports.

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
POPO008 Close Purchase Order Report	Close all qualified purchase orders and generate the Purchase Order Reconciliation report.	Services Procurement, Reconciliations, Close Purchase Orders	RUN_PORECON
PORQ009 Close Requisition	Close all qualified requisitions using the Run Close Requisitions process, and generate the Requisition Reconciliation report.	Services Procurement, Reconciliations, Close Requisitions	RUN_REQRECON
SPINV001 Proforma Invoice	Lists detailed Proforma invoice information.	Services Procurement, Services Settlement, Print Invoices	SPF_GEN_CINP

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
SPINV002 sPro Invoice Report	View the generated voice information in a report form.	Reporting Tools, Query, Query Manager Select the *SPB_SRVC_BY_SHFT* Query Name to run the Shift by Service report.	QRY_QUERY
Shift by Service Shift by Service	Generate a PSQUERY report that lists shifts by service at a setID level.	Reporting Tools, Query, Query Manager Select the *SPB_ASSGNMT_BY_SERVICE* Query Name to run the Assignment by Service report.	QRY_QUERY
Assignment by Service Assignment by Service	Generate a PSQUERY report that lists assignments by service at a setID level.	Reporting Tools, Query, Query Manager Select the *SPB_SRVC_BY_ASSIGNMENT* Query Name to run the Service by Assignment report.	QRY_QUERY
Service by Assignment Service by Assignment	Generate a PSQUERY report that lists services by assignment at a setID level.	Reporting Tools, Query, Query Manager Select the *SPB_SRVC_BY_SHFT* Query Name to run the Service by Shift report.	QRY_QUERY
Service by Shift Service by Shift	Generate a PSQUERY report that lists services by shifts at a setID level.	Reporting Tools, Query, Query Manager	QRY_QUERY

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