PeopleSoft®

PeopleSoft Services Procurement 8.8 PeopleBook

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PeopleSoft Services Procurement 8.8 PeopleBook
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Open Source Disclosure

Contents

About These PeopleBooks

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document 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 either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications.*

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection web site. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection web site, http://www.peoplesoft.com/corp/en/login.asp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection web site, access the PeopleSoft Press web site under the Ordering PeopleBooks topic. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection web site, http://www.peoplesoft.com/corp/en/login.asp

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number 0, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading "See Also" or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date — The last date for which a report or process includes data.

Business Unit — An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description — Enter up to 30 characters of text.

Effective Date — The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and **Don't Run** — Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.

Select Always to run the request every time the batch process runs.

Select Don't Run to ignore the request when the batch process runs.

Report Manager — Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

Preface

This preface discusses:

- PeopleSoft application fundamentals.
- 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.

PeopleSoft Application Fundamentals

The *PeopleSoft Services Procurement 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 for FIN, ESA, and SCM 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.

Common Elements Used In This PeopleBook

Approver	Individual viewing and approving requisitions and invoices. This individual is usually the requestor'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 Requisition	Deliverables based requisitions 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.
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.
Project	Project ID associated with the requisition.
Project Role	Identifies the job to be performed by the service provider who fills the position.
Rate Sheet	Rate template that is defined and associated with a requisition line role and location code.
Requester	Individual within the enterprise that can create and manage service projects, activities, requisitions and work orders, view sourcing and bid/response information. This individual can also approve timesheets and expenses.
Requisition	Document used to request services for qualified service providers.
Resource Based Requisition	Resource requisitions enable you to request the services of an individual service provider.
Run Control ID	An identifier that, when paired with your 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 Coordinator Individual working with both the requestor 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 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 your 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 allows 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 provides an overview of PeopleSoft Services Procurement and discusses:

- PeopleSoft Services Procurement business processes.
- Understanding delivered user roles.
- PeopleSoft Services Procurement integrations.
- PeopleSoft Services Procurement implementation tasks.

PeopleSoft Services Procurement Business Processes

Services Procurement is comprised of four application areas:

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

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

Understanding Delivered User Roles

PeopleSoft delivers the following access for user roles:

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).
Service Coordinator	• Review and source requisitions. • 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).

User Role	Access
Service Provider Contact	• Review requisitions and submit bids. • Maintain communications. • Manage service providers. • Maintain time and expenses (read-only). • Maintain progress logs. • Approve invoices.
Service Provider	Maintain time and expenses.
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.

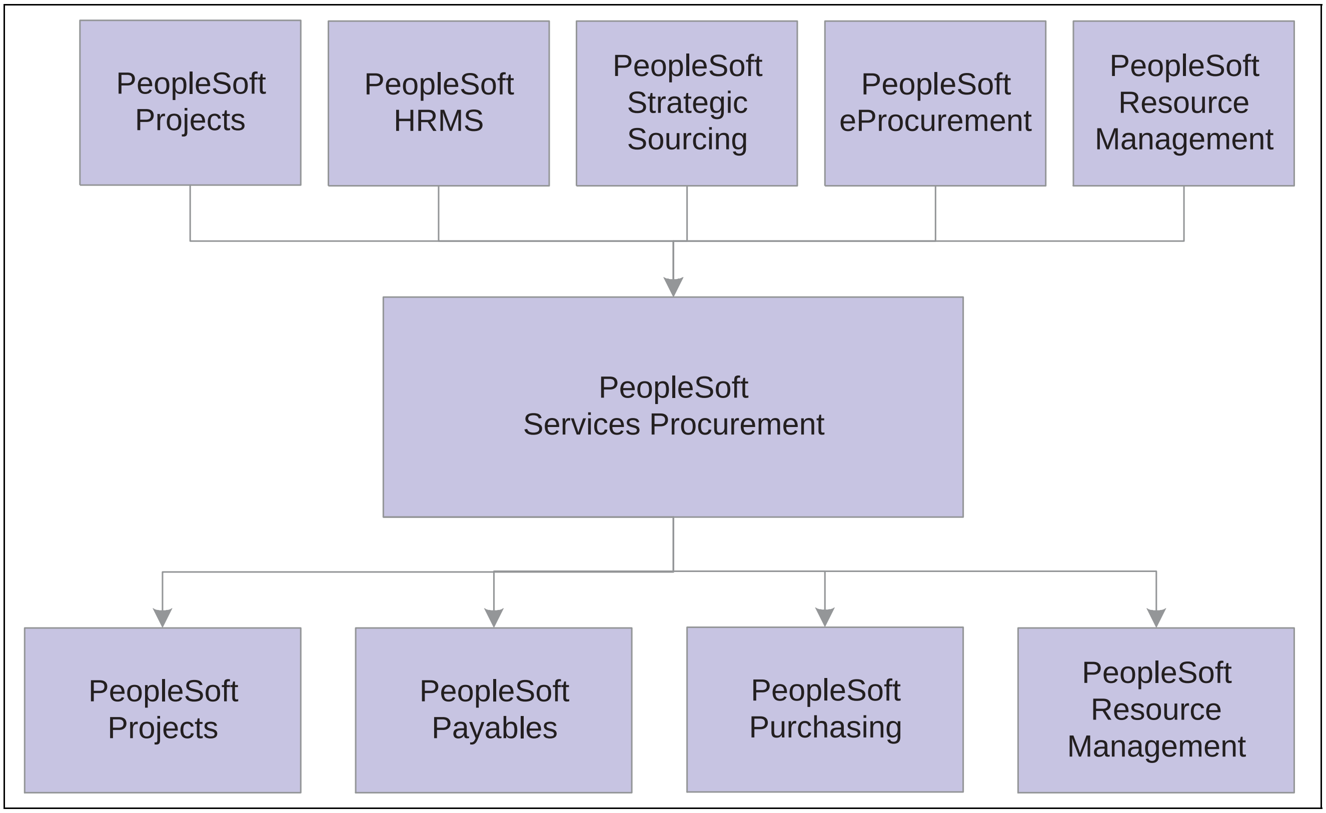
User Role	Access
Administrator	• Define PeopleSoft Services Procurement installation options. • Create PeopleSoft Purchasing business units. • Create PeopleSoft Services Procurement business units. • Create PeopleSoft Projects business units. • Define automatic numbering. • Define currency codes. • Define departments. • Define locations. • Define ship to locations. • Define UOMs. • 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. • Define service suppliers by region. • Define supplier by region and service type. • Define regions by service suppliers. • Define region and service type by supplier.

User Role	Access
Administrator continued	• Define supplier by region/service type. • Define region/service type by supplier. • Define sevices by supplier. • Define suppliers by service. • Define region/service by supplier. • Define supplier by region/service. • Define requester user. • Register service coordinators. • Register provider contacts. • Register service providers. • 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/project roles. • Define service types. • Define service/project roles attributes.

User Role	Access
Administrator continued	• Define services/roles by service type. • Define service type by service/role. • Define service activities. • Define activities by service. • Define payment terms timing. • Define single payment terms. • Define multiple payment terms. • Establish accounts payable interface. • Define time and expense templates. • Define expense business purpose. • Define expense distance rate. • Define expense type.
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.

PeopleSoft Services Procurement Integrations

PeopleSoft Services Procurement integrates with the following PeopleSoft applications:



PeopleSoft Services Procurement integration flow with other PeopleSoft applications

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

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

Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection web site.

PeopleSoft eProcurement

PeopleSoft eProcurement enables organizations to manage the procurement of all goods and services, sharing workflows, vendors, and other common business processes. On the same requisition, you can add lines for goods using PeopleSoft eProcurement, and lines for services using PeopleSoft Services Procurement.

PeopleSoft HRMS

PeopleSoft Services Procurement leverages preestablished organizational hierarchies and competencies from PeopleSoft HRMS and shares them across applications.

PeopleSoft Payables

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

PeopleSoft Projects

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

When the provider logs time and expenses, you can link back to the project set up in PeopleSoft Projects 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.

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 to 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.

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

See *PeopleSoft Resource Management 8.8 PeopleBook*, “Integrating PeopleSoft Resource Management with Other Applications,” Understanding Integration with PeopleSoft Services Procurement.

PeopleSoft Strategic Sourcing

You can integrate to 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 weightage.
- Sort and manage the score.
- Analyze bids and awards.

Implementing PeopleSoft Services Procurement

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

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook

PeopleSoft Setup Manager for Financials, Enterprise Service Automation, and Supply Chain Management 8.8 PeopleBook

CHAPTER 2

PeopleSoft Services Procurement Portal Pagelets

This chapter provides and overview and discusses:

- Pagelets by functional role.
- Using PeopleSoft Services Procurement pagelets.

Understanding PeopleSoft Services Procurement Pagelets

PeopleSoft Services Procurement provides portal pagelets for your 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 it takes a user to complete major tasks in a Services Procurement system. 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 are 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.

Your 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.

Your employees can configure their portal home page 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 your installation includes PeopleSoft Enterprise Portal.

See Also

PeopleSoft Enterprise Portal PeopleBook

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.)

We group our pagelets into functional roles as an example of how to organize access. You need to 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 we provide in our delivered sample data. We deliver sample data security objects (roles and permission lists) that you can use as an example of how to set up pagelet access.

Pagelets by Role

We provide these role groupings as examples of how to organize pagelet access by function.

In this section, we organize employee-facing pagelets by the following sample roles:

- Requester
- Service Coordinator
- Approver

Requester

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

Service Coordinator

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

Approver

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

Using PeopleSoft Services Procurement Pagelets

In this section, we discuss how your employees can view their associated services activities.

Pages Used to View Services Procurement Activities

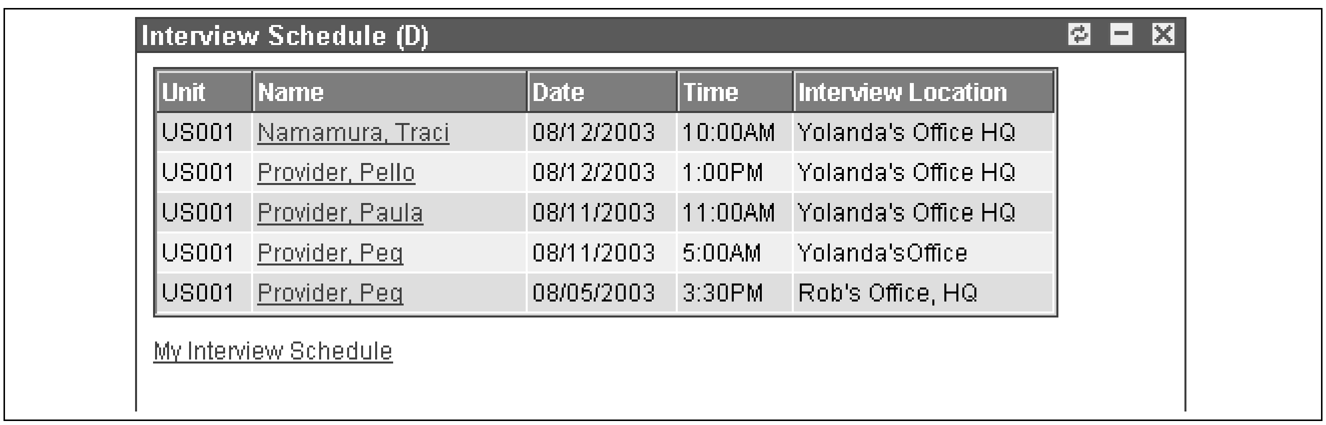
This table provides details on PeopleSoft Services Procurement pagelets.

Pagelet Name	Roles	Usage
Interview Schedule	Requester	Provides a synopsis of your scheduled interviews. See Chapter 12, "Reviewing and Awarding Bids," Creating and Maintaining Interview Schedules, page 171.
Recently Created Requisitions (SPF_E_RCNTRQ)	Requester	Displays the five requisitions you have most recently created. See Chapter 9, "Creating and Managing Requisitions," page 113.
Recent 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 13, "Managing Work Orders," page 175.
Timesheets Approval (SPA_E_TIMAPR)	Requester, Approver	Displays the timesheets and amounts including expenses that are awaiting approval. See Chapter 14, "Managing Time and Expense," page 207.
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 15, "Managing Progress Logs," page 229.
Logistical Tasks (SPF_E_LGTASK)	Requester	Displays the five most recent activities needing to be completed before a work order can be released. See Chapter 13, "Managing Work Orders," Viewing Logistical Tasks, page 204.
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 16, "Managing Settlements," page 237.

Pagelet Name	Roles	Usage
Supplier Headcount (SPR_E_SUPCNT)	Requester, Service Coordinator	Displays the top five suppliers by headcount in a graphical format. See Chapter 17, "Interactive Reports in PeopleSoft Services Procurement," Analyzing Service Provider Rosters, page 268.
Supplier Analysis (SPR_E_SUPANALYZ)	Service Coordinator	Provides a method to compare suppliers based upon supplier performance, service provider performance and rate. See Chapter 17, "Interactive Reports in PeopleSoft Services Procurement," Analyzing Service Provider Performance, page 272.

Interview Schedule Pagelet

Access the Interview Schedule pagelet.



Interview Schedule pagelet

Use this pagelet to view the following schedule details: candidate, date, time of interview and location. Only 10 interview dates that are closest to the current date are displayed 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 user's list of interviews. The system pulls up this list based on user ID.

Recently Created Requisitions Pagelet

Access the Recently Created Requisitions pagelet.

Recent Requisitions (D)

Unit	Requisition ID	Status	Date	Amount	
US001	0000000131	Approved	10/20/2003	113400.00	USD
US001	0000000112	Approved	09/23/2003	4400.00	USD
US001	0000000111	Approved	09/23/2003	5984.00	USD
US001	0000000110	Approved	09/23/2003	9856.00	USD
US001	0000000109	Approved	09/23/2003	9680.00	USD
US001	0000000108	Approved	09/23/2003	5984.00	USD
US001	0000000107	Approved	09/23/2003	9856.00	USD
US001	0000000106	Approved	08/18/2003	70000.00	USD
US001	0000000103	Approved	08/11/2003	131400.00	USD
US001	0000000102	Approved	08/11/2003	146000.00	USD

View Requisition Manager

Recent Requisitions pagelet

Use this pagelet to view the following requisition details: business unit, requisition id, status date, amount and currency code. Only 10 requisitions that are closest to the current date are displayed 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.

Recent Work Orders Pagelet

Access the Recent Work Orders pagelet.

Recent Work Orders

Unit	Work Order ID	Provider
US001	TST00000004000	Mandy, Sarah
US001	DMO00000024000	Mandy, Sarah
US001	DMO00000023000	Inari, John
US001	DMO00000016000	Meitler, Derrick
US001	DMO00000014000	Meitler, Derrick
US001	DMO00000010000	Hansen, Sally
US001	DMO00000008000	Meitler, Derrick

View Work Order Roster

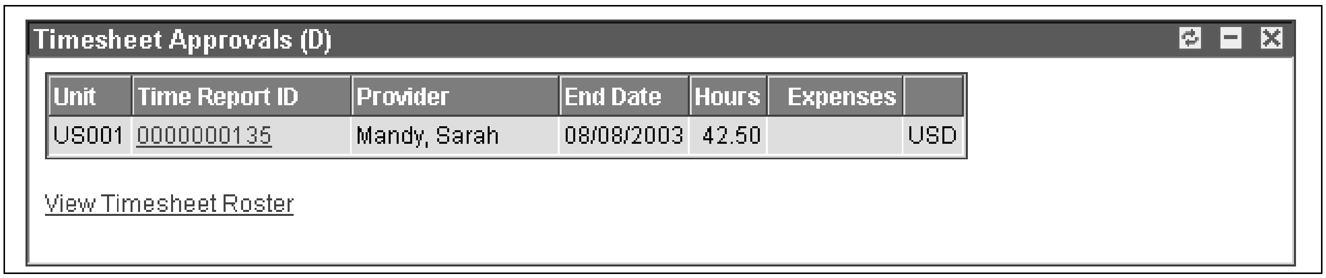
Recent Work Orders pagelet

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

Timesheet Approvals Pagelet

Access the Timesheet Approvals pagelet.



Timesheet Approvals (D)

Unit	Time Report ID	Provider	End Date	Hours	Expenses	
US001	0000000135	Mandy, Sarah	08/08/2003	42.50		USD

View Timesheet Roster

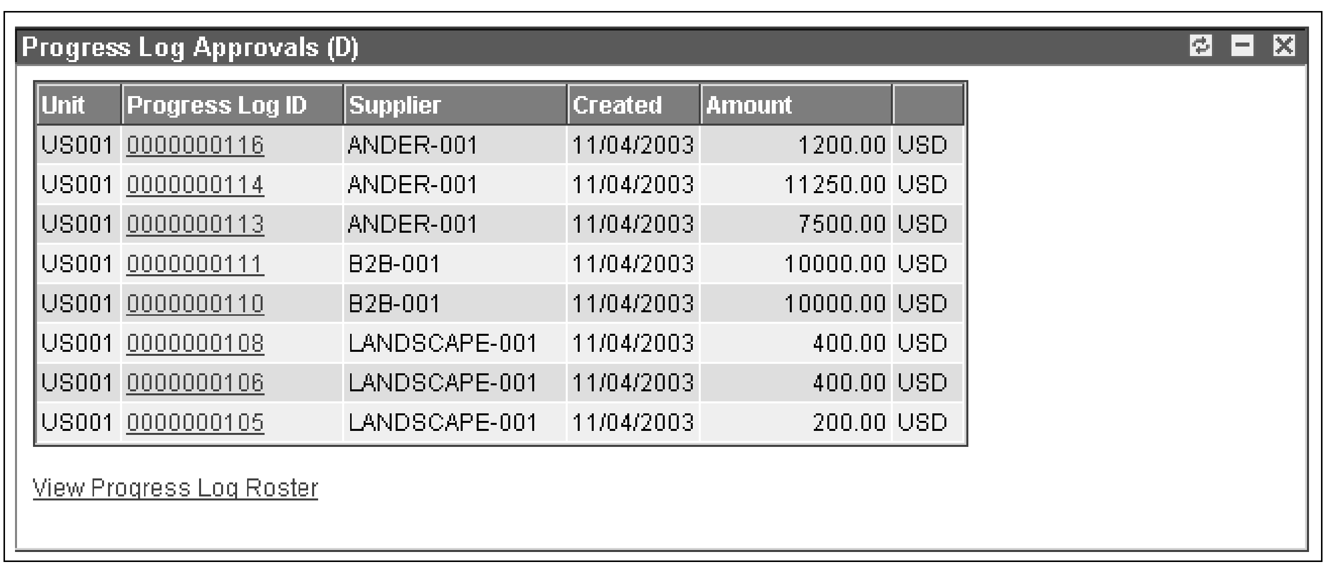
Timesheet Approvals pagelet

Use this pagelet to view the following details for the 10 most recent timesheets with 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 longest approval are displayed first. You can perform the following tasks in the Timesheet Approvals pagelet:

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

Progress Log Approvals Pagelet

Access the Progress Log Approvals pagelet.



Progress Log Approvals (D)

Unit	Progress Log ID	Supplier	Created	Amount	
US001	0000000116	ANDER-001	11/04/2003	1200.00	USD
US001	0000000114	ANDER-001	11/04/2003	11250.00	USD
US001	0000000113	ANDER-001	11/04/2003	7500.00	USD
US001	0000000111	B2B-001	11/04/2003	10000.00	USD
US001	0000000110	B2B-001	11/04/2003	10000.00	USD
US001	0000000108	LANDSCAPE-001	11/04/2003	400.00	USD
US001	0000000106	LANDSCAPE-001	11/04/2003	400.00	USD
US001	0000000105	LANDSCAPE-001	11/04/2003	200.00	USD

View Progress Log Roster

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 the longest approval are displayed first. Also, upon login to the portal page, progress logs with deliverables based payment system instead of resource based payment system can be monitored to find out which ones need approval. You can perform the following tasks in 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.

Logistical Tasks Pagelet

Access the Logistical Tasks pagelet.

Logistical Tasks

Unit	Work Order ID	Provider	Task Description	Due
US001	DMO00000025000	Provider, Pat	Schedule Orientation Session	10/10/2003
US001	DMO00000025000	Provider, Pat	Configure Network Access	10/10/2003
US001	DMO00000025000	Provider, Pat	Configure Network Access	10/10/2003
US001	DMO00000031000	Provider, Pepin	Schedule Orientation Session	10/10/2003
US001	DMO00000031000	Provider, Pepin	Configure Network Access	10/10/2003
US001	DMO00000031000	Provider, Pepin	Configure Network Access	10/10/2003
US001	DMO00000023000	Inari, John	Assign Badge	10/09/2003
US001	DMO00000023000	Inari, John	Set up E-mail Account	10/09/2003
US001	DMO00000023000	Inari, John	Create Name Plate	10/09/2003
US001	DMO00000024000	Mandy, Sarah	Assign Badge	10/09/2003

View Work Order Roster

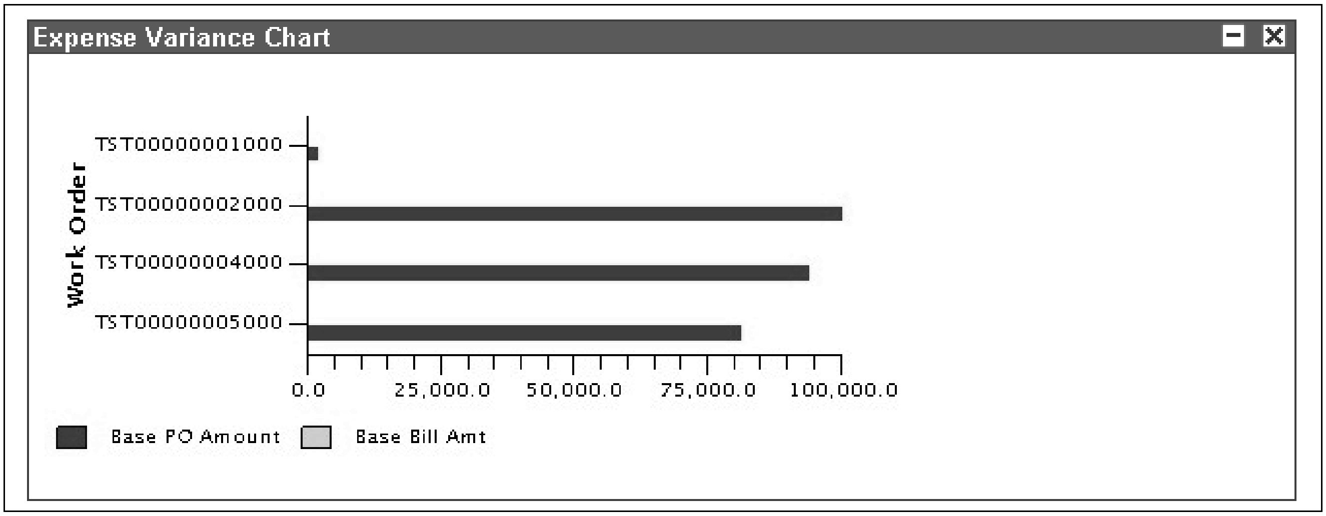
Logistical Tasks pagelet

Use this pagelet to view the 10 most recent pending activities to release a work order. The Logistical Tasks pagelet displays the following: Work Order ID, Provider, and Description. The data is displayed by sorting the Work Order ID in ascending order. You can perform the following tasks in the Logistical Tasks pagelet:

- Click the Work Order ID link to access the service work order details page that allows you to view and edit logistical task list.
- Click View Work Order Roster to access the Manage Services Work Order page.

Expense Variance Chart Pagelet

Access the Expense Variance Chart pagelet.

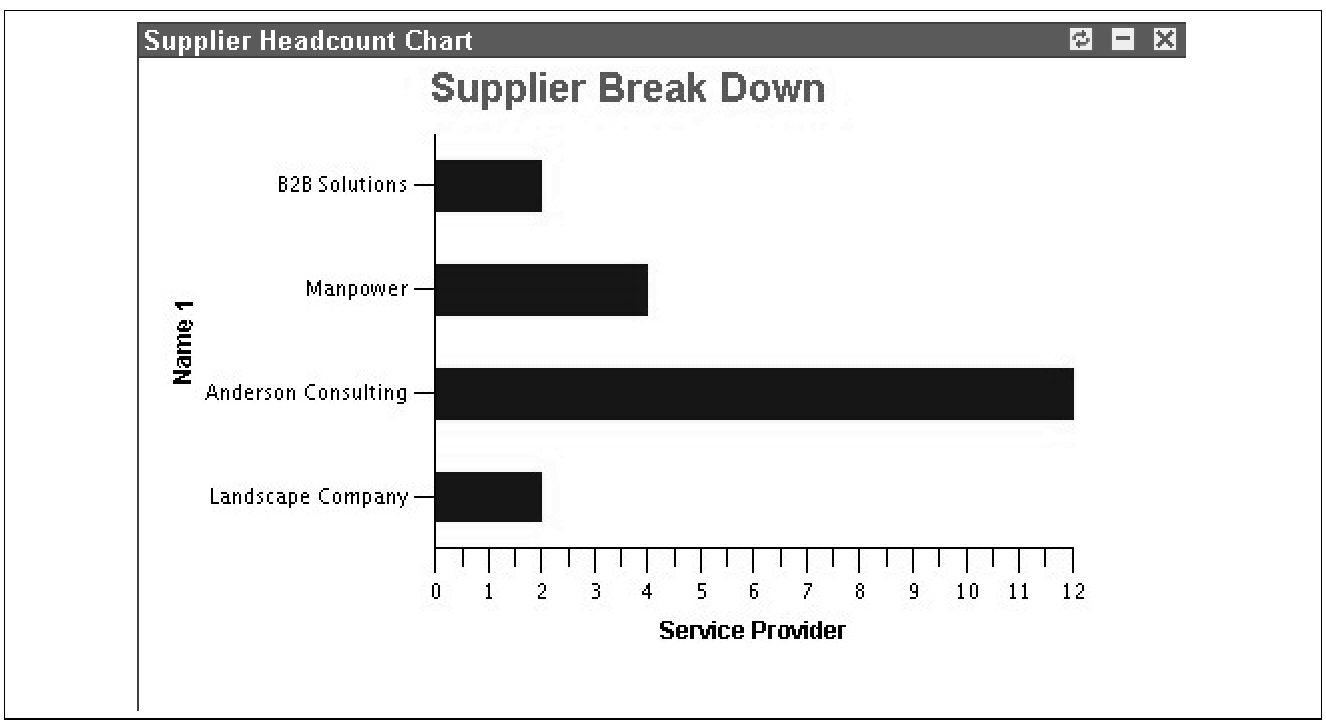


Expense Variance Chart pagelet

The Expense Variance Chart pagelet provides a summary graph of the five active work orders with variance amounts. The graphs display the total amount spent on a work order versus the total work order amount. This allows you to 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 if the progress logs have been invoiced or not.

Supplier Headcount Chart Pagelet

Access the Supplier Headcount Chart pagelet.

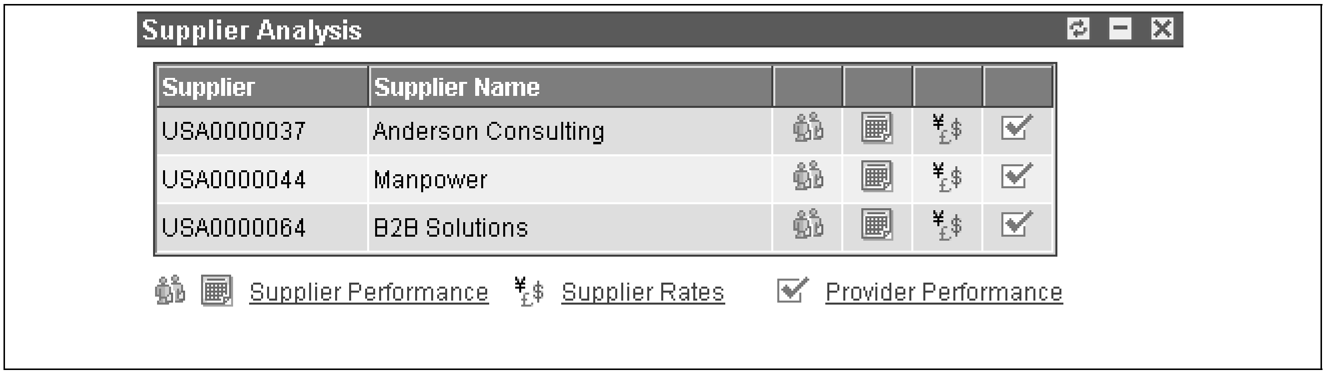


Supplier Headcount Chart pagelet

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

Supplier Analysis Pagelet

Access the Supplier Analysis pagelet.



Supplier Analysis pagelet

Click to access the Supplier Sourcing Review pop-up report.

Click to access the Supplier Response pop-up report.

Click to access the Average Rates by Role pop-up report.

Click to access the Supplier Performance by role pop-up report.

CHAPTER 3

Implementing Your PeopleSoft Services Procurement System

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

- Set up the PeopleSoft Services Procurement system.
- Define installation options.
- Set up general options.
- Set up business units.
- Set up competency definitions.
- Set up bid factors.
- Set up services/project roles, service types and service activities.
- Set up rate sheet definitions.
- Define settlement options.
- Set up project definitions.
- Configure services time and expense.
- Set up users.
- Configure the supplier network.
- Set up suppliers by service type and region.
- Set up logistical tasks.
- Set up file attachment servers.

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 can begin, you need to set up your basic framework by using pages that you access on the Services Procurement Options 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 about using 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.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Setting Installation Options for PeopleSoft Applications,” Defining PeopleSoft Services Procurement Installation Options

Setting Up the PeopleSoft Services Procurement System

The Define Services Procurement page is the focal point for configuring the PeopleSoft Services Procurement system. Use this page to navigate to pages where you set up your services procurement system.

This section discusses how to set up the PeopleSoft Services Procurement system.

page Used to Set Up the PeopleSoft Services Procurement System

Page Name	Object Name	Navigation	Usage
Define Services Procurement	SPA_STR_ADMIN	Services Procurement, Define Services Procurement	Navigate to setup pages.

Setting Up the PeopleSoft Services Procurement System

Access the Define Services Procurement page.

Note. The Pay Types and Markups group box is available if the Enable Pay Types check box is selected on the Services Procurement Options page.

Note. The Locations by Region link will only appear if the Use Region Tree Structure check box is disabled on the Services Procurement Options page.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Setting Installation Options for PeopleSoft Applications,” Defining PeopleSoft Services Procurement Installation Options

Setting Up General Options

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

Pages Used to Set Up General Options

Page Name	Object Name	Navigation	Usage
Auto Numbering	AUTO_NUM_PNL	Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, 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.

Page Name	Object Name	Navigation	Usage
Currency Code	CURRENCY_CD_TABLE	Services Procurement, Define Services Procurement. Click the Currency Code link in the General Options group box.	Define currency. **Note.** Note. To meet the needs of your multicurrency business, PeopleSoft supports the euro and delivers the Currency Code table with many common currencies identified according to ISO standard.
Department	DEPARTMENT	Services Procurement, Define Services Procurement. Click the Department Link in the General Options group box.	Manage department numbers and department names.
ChartField Attributes	CF_ATTRIB_VALUES	Services Procurement, Define Services Procurement. Click the Attributes link on the Departments page.	Define ChartField Attributes.
Location Definition	LOCATION_TBL	Set Up Financials/Supply Chain, Common Definitions, Location, Location, Location Definition Services Procurement, Define Services Procurement. Click the Location link in the General Options group box.	Define a location code, such as a branch office or shipping office.
Location Detail	LOCATION_TBL2	Access the Locations Details tab from the Location Definition page.	Add details to a location definition.
Ship to Location Definition	SHIPTO_HDR	Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Ship to Locations Services Procurement, Define Services Procurement. Click the Ship to Location link in the General Options group box.	Define a ship to location code. This location will be used on the service requisition as the place where the services are to be performed.

Page Name	Object Name	Navigation	Usage
Units of Measure	UNITS_OF_MEASURE	Set Up Financials/Supply Chain, Common Definitions, Units of Measure, Units of Measure Services Procurement, Define Services Procurement. Click the Units of Measure Link in the General Options group box.	Establish units of measure for your resources.

Defining Automatic Numbering

These service 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	Serv. Inv.
NUM_TYPE	SPRQ	Service Requisition	ServiceReq
NUM_TYPE	SPWO	Work Order Code	Work Order

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Defining Financials and Supply Chain Management Common Definitions,” Setting Up Automatic Numbering

Setting Up Business Units

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

- Define PeopleSoft Strategic Sourcing business units.
- Define PeopleSoft Purchasing business units.
- Define PeopleSoft Services Procurement business units.
- Define PeopleSoft eProcurement business units.
- Define PeopleSoft Projects business units.
- Define PeopleSoft Projects business units options.

Understanding PeopleSoft Purchasing Business Units

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

PeopleSoft Services Procurement uses the same business units that are defined in PeopleSoft Purchasing. Nevertheless, in PeopleSoft Services Procurement, you define business-unit-specific attributes. Business units that are specific to PeopleSoft Services Procurement are stored in a separate table called BUS_UNIT_TBL_SP. 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 Units

Page Name	Object Name	Navigation	Usage
Strategic Sourcing Business Unit Definition	BUS_UNIT_TBL_A1	Set Up Financials/Supply Chain, Business Unit Related, Purchasing, Strategic Sourcing Definition Services Procurement, Define Services Procurement Click the Strategic Sourcing link in the Business Unit Definitions group box.	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 Click the Purchasing link in the Business Unit Definitions group box.	Define PeopleSoft Purchasing business units. Link PeopleSoft Purchasing business units to PeopleSoft Services Procurement business units.
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 Click the Services Procurement link in the Business Unit Definitions group box.	Define PeopleSoft Services Procurement business units. Define your own consolidation structures for accounting and reporting purposes.

Page Name	Object Name	Navigation	Usage
eProcurement BU Definition	PV_BUS_UNIT_PM	Services Procurement, Define Services Procurement Click the eProcurement BU Definition link in the Business Unit Definitions group box.	Define eProcurement business units.
Services Project Business Unit Definition	BUS_UNIT_TBL_PC	Set Up Financials/Supply Chain, Business Unit Related, Project Costing, Project Costing Definition Services Procurement, Define Services Procurement Click the Projects link in the Business Unit Definitions group box.	Define PeopleSoft Projects business units.
Services Project Business Unit Options	BUS_UNIT_TBL_PC	Set Up Financials/Supply Chain, Business Unit Related, Project Costing, Project Costing Options Services Procurement, Define Services Procurement Click the Projects BU Options link in the Business Unit Definitions group box.	Define PeopleSoft Projects business unit options.

Defining PeopleSoft Strategic Sourcing Business Units

Access the Strategic Sourcing Business Unit Definition page.

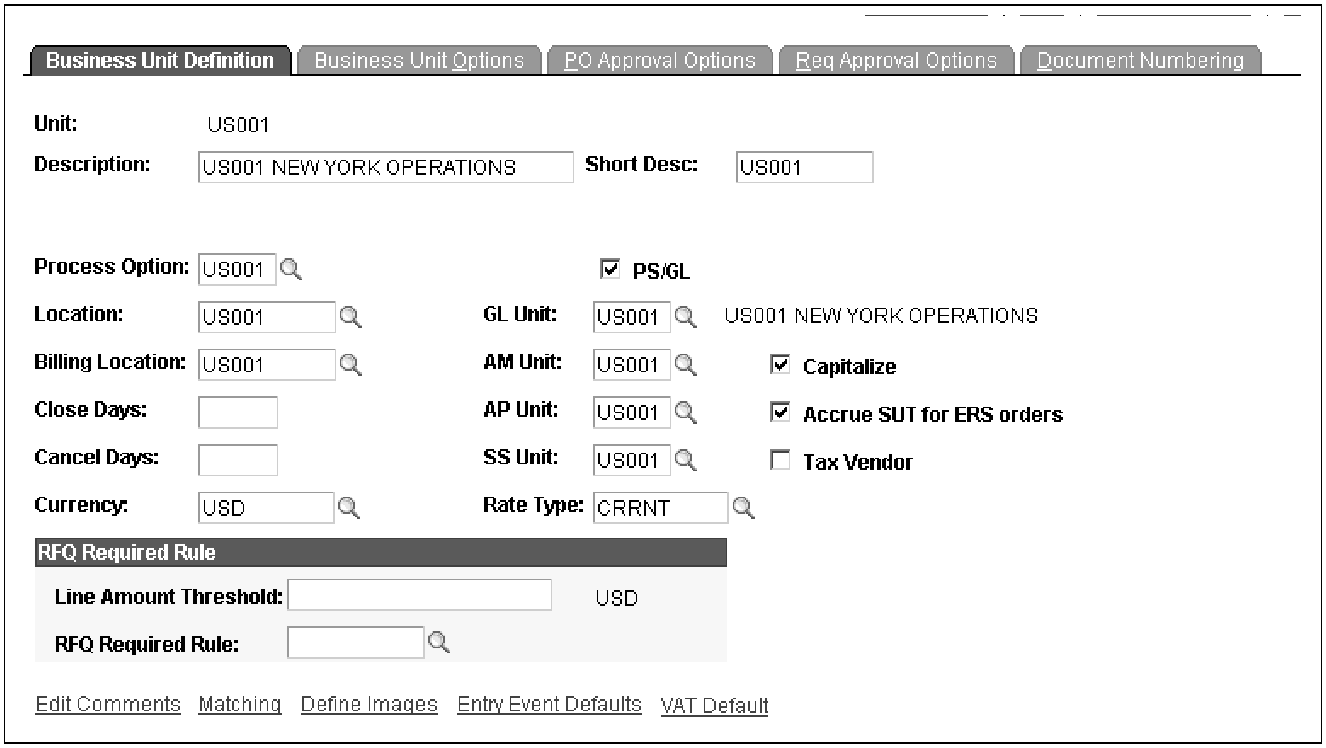
The Strategic Sourcing business unit is required on the Purchasing business unit when Services Procurement is installed.

See *PeopleSoft Strategic Sourcing 8.8 PeopleBook*, “Setting Up Business Units in PeopleSoft Strategic Sourcing”.

Note. We suggest 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.

Defining PeopleSoft Purchasing Business Units

Access the Purchasing - Business Unit Definition page.



Business Unit Definition page

Note. If you clear the Asset Management, General Ledger, and Payables check boxes on the Installation Options - Products page, they are no longer required values on the Purchasing Definitions 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 your company's location.

Billing Location

Enter the invoice destination location for this business unit. Available locations are defined on the Location Definitions 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.

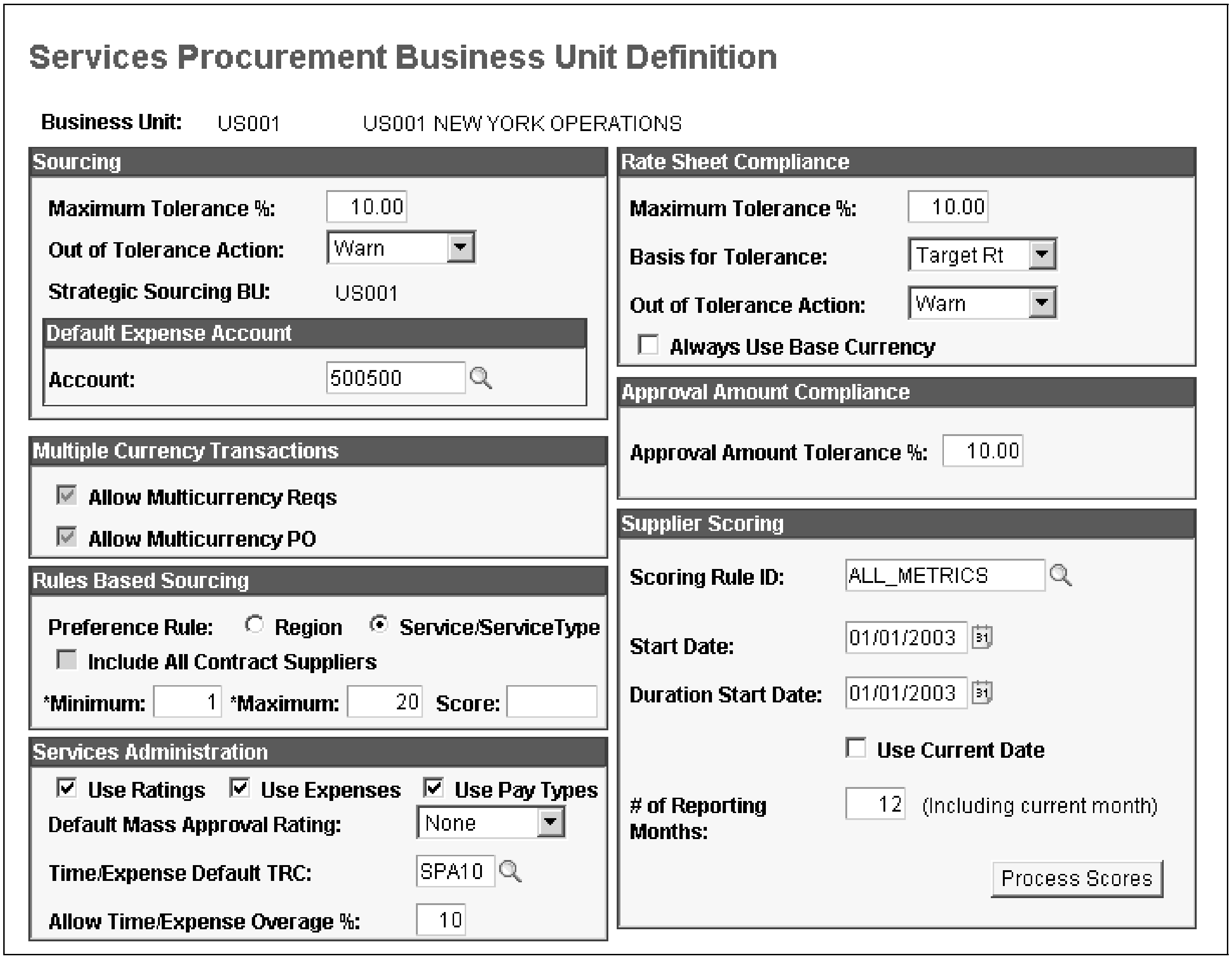
SS Unit

Enter the Strategic Sourcing Business unit. This will be used by Services Procurement during the bidding process.

Defining PeopleSoft Services Procurement Business Units

To create PeopleSoft Services Procurement business units, use the Services Procurement BU component.

Access the Services Procurement Business Unit Definition page.



Services Procurement Business Unit Definition (page 1 of 2)

Services Procurement Business Unit Definition (page 2 of 2)

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

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* option prevents the supplier from submitting the bid if it is out of tolerance.

Strat/Sourcing Event BU (strategic sourcing event business unit)
Displays the Strategic Sourcing Event business unit defined on the Purchasing business unit. The update the value, use the Purchasing Business Unit Definition page.

Rate Sheet Compliance

Maximum Tolerance %
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 your tolerance cannot exceed the minimum or maximum range defined on your rate sheet. Select *Target Rate* if the tolerance cannot exceed the target range defined for your rate sheets.

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.

Always Use Base Currency
Select to define currency for rate sheet tolerance. If 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.

Multiple Currency Transactions

Allow Multicurrency Reqs
Determines if the selected business unit allows multiple currency requisitions. If selected, then the requester's currency is defaulted onto the requisition and the user can change it to another currency.

To modify this field, access the Purchasing Business Unit Definitions page. If the check box is not selected, the system uses the business unit currency as the requisition currency and the user is not allowed to change it.

Allow Multicurrency PO
Determines if the selected business unit allows multicurrency work orders and purchase orders. If selected the user can enter expenses in a currency other than the work order currency.

To modify this field, access the Purchasing Business Unit Definitions page. If the check box is not selected, expenses must be entered in the currency you establish on the work order.

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

Approval Amount Compliance

Approval Amount Tolerance %
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. The system uses the approval tolerance amount percentage while comparing the filled requisition amount against the approved requisition amount. If the filled amount exceeds the approval amount tolerance, the requisition will be re-routed for approval.

Note. The requisition will not be re-routed for approval if the user who fills the requisition has one of the role actions defined for the*SP_IGNORE_REAPPROVE* role action.

Rules Based Sourcing

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 are listed first on the sourcing selection page. If *Service/Service Type* is the preferred rule, all suppliers defined for the service or service type are listed first on the sourcing selection page.

Use All Contract Suppliers
If enabled, suppliers with contracts will be returned in the sourcing selection even if they are not defined for the requisition region or service type. If disabled, the sourcing selection will ignore contract suppliers.

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

Minimum and **Maximum**
Enter the minimum and maximum number of suppliers to be returned from the sourcing rules and displayed on the sourcing selection page.

Score
Enter a score range between 0 and 100. Supplier scores must have this score or higher to meet the requisition requirements and be displayed in the sourcing selection page. Suppliers below the score will not appear on the sourcing selection page.

Supplier Scoring

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

Start 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.

Note. If the values that you enter in the Duration Start 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 01/01/2002, the duration date is 06/30/2002, and the number of reporting months is −12 (indicating 12 months of data prior to 06/30/2002), the system retrieves data only for the period between 01/01/2002 and 06/30/2002. The system does not retrieve data prior to 01/01/2002 or, in this example, between 07/01/2001 and 12/31/2001.

Duration Start Date and **# of Reporting Months**

The system uses the Duration Start Date field in conjunction with the # of Reporting Months field to determine the period used 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.

Use Current Date

Select to define the 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.

Process Scores

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

Services Administration

Use Ratings

Select to enable use of performance ratings on timesheets and progress logs. If selected, the system makes available the Default Time Mass Approval Rating field. By default, the check box is cleared.

Use Expenses

Select to allow the entry of expenses on requisitions and work orders. By default, the check box is cleared, meaning expenses are not allowed.

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

Use Pay Types

Select to allow suppliers to enter the breakdown of the rate they are bidding - how much goes to the service provider, how much is vendor markup, etc. By default, the check box is cleared, meaning the supplier will enter one rate inclusive of all rate breakdowns.

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

Default Time Mass Approval Rating

Select the rating to be used when mass approving timesheets and progress logs:*Excellent, Fair, Good, Poor,* or *None*.

Note. This field is only accessible if *Use Ratings* is enabled.

Note. Note. If you leave this option blank, the rating of *None* will default onto all timesheets and progress logs that are mass approved.

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

Select a time reporting code (TRC). The system uses this TRC as the default for time and expense entries. The system uses the TRC to calculate invoice amounts.

The system also uses this default to populate the Standard TRC field on the Overtime Rules page for services templates, if you selected the Use Overtime check box on the Services Template page.

Note. We recommend that you select a TRC with a multiplication factor of 1.0, because the TRC is used in all invoice calculations for work orders that do not allow overtime. 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.

Work Order Notification Alert

The system provides an alert system to notify users when work orders are nearing the end date or nearing the amount on the work order. 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 completing on time.

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

Notify on End Date/Consumption

Select *Yes* to enable work order alerts. The process scheduler must be running in order for notifications to occur.

Days in Advance for Alert

Enter the number of days before the work order end date that the system should notify the user that the work order is nearing the end date.

Alert Notification Method

Select whether the alert notification must be sent using a worklist only or email and worklist.

Alert when % Consumed

Enter the work order consumption percentage at which the system needs to notify the user.

Role to Notify Select the role that the system needs to notify of the work order. Values are: *Inv Approv, Requestor,* or *Time Appr.*

Analysis

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

Defining PeopleSoft eProcurement Business Units

Access the eProcurement BU Definition page.

The business unit enables you determine if you are using workflow approvals.

Workflow Approval Required Enable the workflow for the eProcurement business unit by selecting the check box.

Note. We suggest 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.

Defining PeopleSoft Projects Business Units

Access the Project Business Unit Definition page.

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

See *PeopleSoft Project Costing 8.8 PeopleBook*, “Defining Project Business Units”.

Note. We suggest 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.

Defining PeopleSoft Projects Business Unit Options

Access the Services Project Business Unit Definition page.

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

Note. We suggest 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.

See *PeopleSoft Project Costing 8.8 PeopleBook*, “Defining Project Business Units”.

Setting Up Bid Factors

Use bid factor rules to determine the best bid to fulfill your requisition requirements.

This section provides an overview of bid factors and discusses how to:

- Create bid factors.
- Map bid factors.
- Define bid factors by item category.

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 allows for the defaulting of bid factors onto the requisition. This ensures that bid factors relevant to the requisition are automatically defaulted onto the requisition. Bid factors can be added on the fly while creating the requisition and can be edited before sourcing the requisition. Setting up the standard bid factors will help alleviate the work during requisition creation and sourcing.

Bid Factors default from several setup pages:

1. *Bid Factor Mapping* The Bid Factor mapping page allows the user to define which bid factors should be displayed on deliverables based requisitions and which should be displayed on resource based requisitions. A bid factor can be displayed on both resource and deliverable requisitions.

   See Chapter 3, "Implementing Your PeopleSoft Services Procurement System," Mapping Bid Factors, page 37.

2. *Bid Factors by Category.* Bid Factors can be added to item categories. The item category is linked to the service type on the requisition. When the service type is selected on the requisition, the bid factors matching that service type are defaulted onto the bid factors by requisition page.

   See Chapter 3, "Implementing Your PeopleSoft Services Procurement System," Defining Bid Factors by Category, page 38.

3. *Bid Factor by Service* Bid Factors can be linked to services/project roles. When the services/project role is selected on the requisitions, the bid factors linked to that services/project role are defaulted onto the bid factors by requisition page.

   See Chapter 3, "Implementing Your PeopleSoft Services Procurement System," Setting Up Services/Project Roles, page 42.

4. *Bid Factors by Activity.* Bid Factors can be linked to deliverable activities. When a service is selected on a deliverables requisition, the bid factors linked to the activities by service are defaulted onto the bid factors by requisition page.

   See Chapter 3, "Implementing Your PeopleSoft Services Procurement System," Setting up Service Activities, page 45.

Note. If the same bid factor is defined in multiple defaulting pages shown above, the system deletes the duplicates so that a bid factor will only be displayed once on the bid factors by requisition page.

Pages Used to Set Up Bid Factors

Page Name	Object Name	Navigation	Usage
Bid Factors	BID_FACTOR_PNL	Services Procurement, Define Services Procurement Click the Create Bid Factors link in the Bid Factors Group box.	Create bid factors.
Bid Factor Mapping	SPF_BIDFCTR_MAP_PG	Services Procurement, Define Services Procurement Click the Bid Factor Mapping link in the Bid Factors Group box.	Map predefined PeopleSoft Services Procurement attributes to bid factors in the Strategic Sourcing module.
Bid Factor Grouping	BID_FACTOR_GRP	Services Procurement, Define Services Procurement Click the Bid Factor Group link in the Bid Factor Group box.	Group bid factors. See (Creating and using bid factors in the Strategic Sourcing PeopleBook).
Bid Factors by Category	SP_BDFTR_BY_CAT_PG	Services Procurement, Define Services Procurement Click the Bid Factors by Category link in the Bid Factor Group box.	Link bid factors to a category.

Creating Bid Factors

Access the Factors page.

Type

Select the bid factor type. The bid factor type determines the bid factor questions.

Options are: *Date, List, Monetary, Numeric, Separator, Text,* and *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.

Ideal

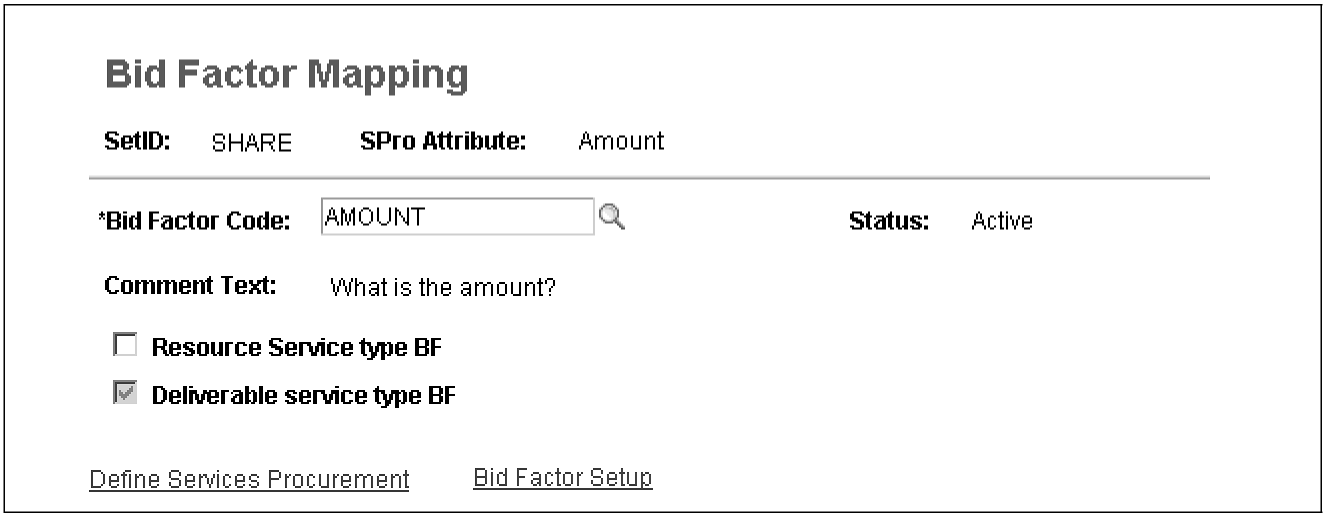
Enter the ideal response for the bid factor question that you create.

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

Mapping Bid Factors

To map bid factors, use the Bid Factor Mapping component.

Access the Bid Factor Mapping page.



Bid Factor Mapping page

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 Select the bid factor code that maps to the

Status Displays the status of the bid factor mapping.

Comment Text Displays the question for the bid factor code.

Resource Service Type BF Select if the bid factor should appear on resource based requisitions.

Note. The *RATE* and *CANDIDATE* bid factor mappings should only occur on resource based requisitions and therefore should have only the resource service type bf check box enabled.

Deliverable Service Type BF Select if the bid factor should appear on deliverables based requisitions.

The *AMOUNT* bid factor mappings should only occur on deliverables based requisitions and therefore should have only the deliverables service type bf check box enabled.

Note. Use ad hoc bid factors 1–5 to create unique bid factor values that appear by default in requisitions.

Defining Bid Factors by Category

To associate bid factors to categories, use the Bid Factors by Category component.

Access the 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 will list them on the bid factors by requisition line page.

Setting Up Competency Definitions

This section discusses how to define competencies. Competencies are used on requisitions to indicate what skills you need on your project.

Competencies also exist in the PeopleSoft HRMS database. If you are integrating with a PeopleSoft HRMS database, you must navigate to the Resource Management Installation options page and define which product ’owns’ the competency tables.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Setting Installation Options for PeopleSoft Applications,” Setting Up PeopleSoft Resource Management Installation Options

Pages Used to Set Up Competency Definitions

Page Name	Object Name	Navigation	Usage
Competency Type	RS_CM_TYPE_TBL	Services Procurement, Define Services Procurement Click the Competency Type link in the Competency Setup group box.	Enter a long or short description for new competency types.
Competencies	RS_CM_COMPTNCY_TBL	Services Procurement, Define Services Procurement Click the Competencies link in the Competency Setup group box.	Define competencies.

Defining Competencies

Access the Competencies page.

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.

Setting Up Services/Project Roles, Service Types and Service Activities

This section discusses how to:

- Set up services/project roles.
- Set up service types.
- Set up service activities.

Pages Used to Set Up Services/Project Roles, Service Types, and Service Activities

Page Name	Object Name	Navigation	Usage
Service/Project Role	SPB_PROJ_ROLE	Set up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Roles, Service/Project Role Services Procurement, Define Services Procurement Click the Service/Project Role link in the Role/Service Type Setup group box.	Set up project roles.
Bid Factors by Service	SP_BDFTR_BY_SER_PG	Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Roles, Service/Project Role Click the Bid Factors by Service link on the Project Role/Service page. Services Procurement, Define Services Procurement Click the Service/Project Role link in the Role/Service Type Setup group box. Click the Bid Factors by Service link on the Project Role/Service page.	Define bid factors by service for deliverables based services.

Page Name	Object Name	Navigation	Usage
Select Bid Factor Group	SP_BDFTR_GRP_SRCH	Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Roles, Service/Project Role Click the Bid Factors by Service link on the Project Role/Service page. Click the Select Bid Factor Group link on the Bid Factors by Service page. Services Procurement, Define Services Procurement Click the Service/Project Role link in the Role/Service Type Setup group box. Click the Bid Factors by Service link on the Project Role/Service page. Click the Select Bid Factor Group link on the Bid Factors by Service page.	Select bid factors to add to the services/project role for deliverables bases services.
Service/Project Role Attribute	SPB_ROLE_COMP_PG	Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Roles, Service/Project Role Attribute Services Procurement, Define Services Procurement Click the Service/Project Role Attributes link in the Service/Service Type Setup group box.	Define the services/project role attributes.
Item Categories	ITEM_CATEGORIES	Items, Define Controls, Item Categories	Define categories for Service Types.
Service Types	SPB_ROLE_TYPE	Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Roles, Service Types Services Procurement, Define Services Procurement Click the Service Type link in the Service/Service Type Setup group box.	Set up service types.

Page Name	Object Name	Navigation	Usage
Service Types by Role	SPB_PJROLE_SERVICE	Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Roles, Service Types by Role Services Procurement, Define Services Procurement Click the Service Types by Role link in the Service/Service Type Setup group box.	Define service types by role.
Services/Roles By Service Typ	SPB_ROLESBYTYPE	Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Roles, Services/Roles by Service Type Services Procurement, Define Services Procurement Click the Services By Service Type link in the Service/Service Type Setup group box.	Define project roles by role type.
Service Activities	SPB_SETID_ACTIVITY	Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Roles, Service Activities Services Procurement, Define Services Procurement Click the Services Activities link in the Service Activities Setup group box.	Define service activities for deliverables based services.
Bid Factors by Activity	SP_BDFTR_BY_ACT_PG	Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Roles, Service Activities Click on the Bid Factors by Activity link on the Service Activities page. Services Procurement, Define Services Procurement Click the Services Activities link in the Service/Service Type Setup group box. Click on the Bid Factors by Activity link on the Service Activities page.	Define the bid factors by deliverable activity.

Page Name	Object Name	Navigation	Usage
Select Bid Factor Group	SP_BDFTR_GRP_SRCH	Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Roles, Service Activities Click on the Bid Factors by Activity link on the Service Activities page. Click on the Select Bid Factor Group link on the Bid Factors by Activity page. Services Procurement, Define Services Procurement Click the Services Activities link in the Service Activities Setup group box. Click the Select Bid Factor Group link on the Service Activities page. Click on the Select Bid Factor Group link on the Bid Factors by Activity 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/Roles, Activities by Service Services Procurement, Define Services Procurement Click the Activities by Service link in the Service Activities Setup group box.	Define activities by service.

Setting Up Services/Project Roles

To set up project roles/service types, use the Service/Project Role component.

Access the Service/Project Role page.

Select the Service/Project Role and Service Method and click Search.

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

Service Method Select *Deliverable* or *Resource* as the service method.

Note. Service methods established on this page (deliverable or resource) appear on the requisition and work order. Resource-based services or roles reflect work that is typically conducted by a single service provider who records his time worked on the project. Deliverable-based services or roles reflect work generally conducted by an entire work team and progress can be recorded by milestones, percentages or quantity of work completed.

The system allows *Default Settlement Option* and *Allow add activities* options only for deliverable based services or roles.

Show Bid Select the check box to allow the supplier to view the requisition rate when bidding on a requisition. Clear the check box to hide the requisition rate from the supplier.

Settlement Option Select *Fixed Amt, Milestone,Percentage* or *Rate Based.* settlement option.

Fixed amount and milestone allow the supplier to log progress against milestone activities that are defined for a project. With the fixed amount settlement option, the supplier enters the amount he expects to be paid for each milestone. The milestone settlement option amounts are defined on the work order by the enterprise and the supplier can not change it.

The Percentage settlement option allows the supplier to log the percentage of work he has completed. The amount paid out will be that percentage of the work order total.

The Rate Based settlement option allows the user to enter the activity and quantity of work he has completed. The actual amounts paid for each activity are defined on the work order by the enterprise.

Grouping Bid Factors by Service

Access the Bid Factors by Service page.

Associate bid factors to a deliverables service. When you enter a service on a deliverable-based requisition, the bid factors linked to the service appears on the requisition. This enables suppliers to enter responses to these bid factors. The suppliers responses can be compared against each other in order 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 Services/Project Role Attributes

To set up services/project role attributes, use the Service/Project Role Attributes component.

Access the Service/Project Role Attributes page.

Service/Project Role Attributes are defaulted onto the requisition. Defining them here allows for a simplified requisition entry.

Description Enter the description of the services/project role.

Note. This value defaults onto the requisition as the *Job Title*

Comments Enter comments describing the role.

Note. This value defaults onto the requisition as the *Scope of Work*.

Experience Enter the years of experience this role requires.

Note. This value defaults onto the requisition as the *Experience*.

Education Level Enter the lowest level of education this role requires.

Note. This value defaults onto the requisition as the *Education Level*.

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

Note. This value defaults onto the requisition as the *Interview Required*.

Competencies Add or delete competency types for the candidate.

Note. This value defaults onto the requisition as the *Competencies*.

Note. The *Experience, Education Level* and *Interview Required* options are available only for resource based requisitions.

Setting Up Item Categories

To set up item categories, use the Item Category component.

See *PeopleSoft Purchasing 8.8 PeopleBook*, "Defining Purchasing Item Information," Defining Item Categories.

Setting Up Service Types

To set up service types, use the Service Type component.

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, etc. linked to that service type.

Service Method Select the service method for the service type.

Category Select the item category for the service type.

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.

Setting Up Service Types by Service/Role

To set up service types by service/role, use the Service Types by Service/Role component.

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, etc. linked to that service type. When a service type is selected on a requisition, the services/roles you can select are only those which are linked to the service type.

Default Service Type Select the check box for the default service type for the service/role. There can only be one default. This is used by service contracts to determine which service type to use for a role selected on the service contract.

Service Type Select the service type for the role.

Description Displays the description for the service type.

Setting Up Services/Roles by Service Type

To set up services/roles by service types, use the Services/Roles by Service Type component.

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, etc. linked to that service type. When a service type is selected on a requisition, the services/roles 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/project role.

Description Displays the description for the services/project role.

Setting up Service Activities

To set up service activities, use the Service Activities component.

Service activities are defined 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 are defaulted onto the bid factors by requisition page.

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

Activity ID Enter the Activity ID.

Description Enter a description for the Activity ID.

Grouping Bid Factors by Activity

Access the Bid Factors by Activity page.

Associate bid factors to activities. When you enter a service on a deliverable-based requisition, the bid factors linked to the activities for the service appears on the requisition. This enables suppliers to enter responses to these bid factors. The suppliers responses can be compared against each other in order 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

To set up activities by service, use the Activities by Service component.

Activities can be linked to deliverables based services so if there are activities 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 are defaulted onto the requisition as well as bid factors linked to the activity.

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

Setting Up Rate Sheet Definitions

This section discusses how to:

- Define region codes.
- Define locations by region.
- Maintain rate sheets.

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

Pages Used to Set Up Rate Sheet Definitions

Page Name	Object Name	Navigation	Usage
Region Codes	REGION_CD	Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Regions/Ratesheets, Service Region Code Services Procurement, Define Services Procurement Click the Service Region Codes link in the Rate Sheet Definition group box.	Define procurement region codes.
Region Codes Address	REGION_CD_AD	Select the Region Codes Address tab on the Region Codes page.	Enter service region code address information.
Locations by Region	SPB_REGIONLOCATION	Services Procurement, Define Services Procurement Click the Locations by Region link in the Rate Sheet Definition group box.	Define ship to location by region code. **Note.** The link on the Define Services Procurement page will only be available if the Use Region Tree Structure check box is disabled on the Services Procurement Installation Options.
Maintain Rate Sheets	SPB_RATESHEET_NEW	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Regions/Ratesheets, Maintain Ratesheets • Services Procurement, Define Services Procurement Click the Maintain Rate Sheets link in the Rate Sheet Definition group box.	Maintain rate sheets, by defining rate sheet values. **Note.** If you define rate limits for a particular service within a specific region, and then create service requisitions, the system determines if the rate on the requisition falls within the minimum and maximum rates established on the Maintain Rate Sheets page.
Rate Sheet List	SPB_RS_LIST	Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Regions/Ratesheets, Ratesheet List Services Procurement, Define Services Procurement Click the Rate Sheet List link in the Rate Sheet Definition group box.	View ratesheets by service/role to compare rates across different regions.

Defining Region Codes

Access the 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 Services Procurement. Regions adding from the link on the Define Services Procurement page are automatically created with a category of *Procurement.*

Maintaining Rate Sheets

To maintain rate sheets, use the Services Ratesheet component.

Access the Maintain Rate Sheets page.

Maintain Rate Sheets page

Rate sheets are used 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/services because deliverables based services are created for an entire amount, not a specific rate.

You can create a rate sheet for the same region and role but with a different currency.

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 defaults when creating a requisition for the rate sheet role, region and currency.

Define Locations by Region

Access the Locations by Region page.

Link ship-to locations to procurement regions. The ship to location is entered on the service requisition and the work order. The rate sheets uses this location/region relationship to determine which rate sheet to use.

Note. You should only access this page if the Use Region Tree Structure check box is disabled on the Services Procurement Installation Options. If you use the region tree, you will link ship-to locations to regions using the tree manager.

See Also

Chapter 3, "Implementing Your PeopleSoft Services Procurement System," Building the Region Hierarchy, page 78

View Rate Sheet List

Access the Rate Sheet List page.

Enter a services/project role to view all rate sheets defined for that role across different regions and in different currencies.

Defining Settlements

This section discusses how to:

- Define payment terms timing.
- 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.

Pages Used to Define Settlements

Page Name	Object Name	Navigation	Usage
Payment Terms Timing Codes	PYMT_TERMS_TIMING	Services Procurement, Define Services Procurement Click the Payment Terms Timing link in the Invoicing Setup group box.	Define payment terms timing for each period that you reference in your payments.
Single Pay Terms	PYMT_TERMS_SINGLE	Services Procurement, Define Services Procurement Click the Payment Terms − Single link in the Invoicing Setup group box.	Define valid payment terms for single payments.
Search Where Used	SNGL_TRMS_WHR_USED	Click the Search Where Used link on the Single Pay Terms 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 Single Pay Terms page.	Calculate example data for single payment terms.
Multiple Pay Terms	PYMT_TERMS_MULTI	Services Procurement, Define Services Procurement Click the Payment Terms - Multiple link in the Invoicing Setup group box.	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 Multiple Pay Terms page.	Calculate example data for multiple payment terms.
Accounts Payable Interface	SPA_AP_INTRFACE	• Set Up Financials/Supply Chain, Product Related, Services Procurement, AP Interface • Services Procurement, Define Services Procurement Click the Accounts Payable Interface link in the Invoicing Setup group box.	Define accounts payable application interface information.

Defining Payment Terms Timing

Access the Payment Terms Timing page.

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.

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 of 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, you would 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 your 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.

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.

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.

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.


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.

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.

Use this page in the same way that you use the Calculate Example Payment Data (single payment terms) page.

Defining the Accounts Payable Interface

To set up the accounts payable interface, use the AP Interface component.

Access the Accounts Payable Interface page.

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 Project Definitions

This section discusses how to set up project types.

Pages Used to Set Up Project Definitions

Page Name	Object Name	Navigation	Usage
Services Project Types	SPA_PROJ_TYPE_DEFN	Services Procurement, Define Services Procurement Click the Project Types link in the Projects Setup group box.	Set up project types, by entering and maintaining project type information.

Setting Up Project Types

To set up services project types, use the Services Project Type component.

Access the Services Project Types page.

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.

Configuring Services Time and Expense

This section discusses how to:

- Create services templates.
- Define overtime rules.
- Define expense business purposes.
- Define expense distance rates.
- Define expense types.
- Define additional expense types.
- Define expense payment types.
- Define expense locations.
- Define preferred merchants.
- Define Time Reporting Codes (TRCs).

Pages Used to Configure Services Time and Expense

Page Name	Object Name	Navigation	Usage
Services Template	SPA_TIME_TMPL_PG	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Time and Expense, Services Template • Services Procurement, Define Services Procurement Click the Services Template link in the Time and Expense Setup group box.	Create services templates. Enter or modify options used in a timesheet to enter time and expense information and progress information.
Overtime Rules	SPA_TIME_TMPL_PG2	Click the Overtime Rules link from the Services Template page.	Define rules that the system uses to perform time and expense calculations using time reporting codes.
Business Purpose	EX_PURPOSE	Services Procurement, Define Services Procurement Click the Expense Business Purpose link in the Time and Expense Setup group box.	Use business purposes to justify a business expense as a corporate tax deduction.

Page Name	Object Name	Navigation	Usage
Distance Rate	EX_AUTO_RT_TBL	Services Procurement, Define Services Procurement Click the Expense Distance Rate link in the Time and Expense Setup group box.	Define expense distance rates.
Expense Types1	SPA_EXPENSE_TYPES1	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Time and Expense, Expense Type • Services Procurement, Define Services Procurement Click the Expense Type link in the Time and Expense Setup group box.	Define expense types.
Expense Types2	SPA_EXPENSE_TYPES3	Select the Expense Types2 tab from the Expense Types1 page.	Define expense types.
Expense Payment Type	SPA_EXPEND_MTHD	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Time and Expense, Expense Payment Type • Services Procurement, Define Services Procurement Click the Expense Payment Type link in the Time and Expense Setup group box.	Create payment types that display on an expense sheet how an expense item was paid for.
Expense Location	EX_LOCATION	Services Procurement, Define Services Procurement Click the Expense Location link in the Time and Expense Setup group box.	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.

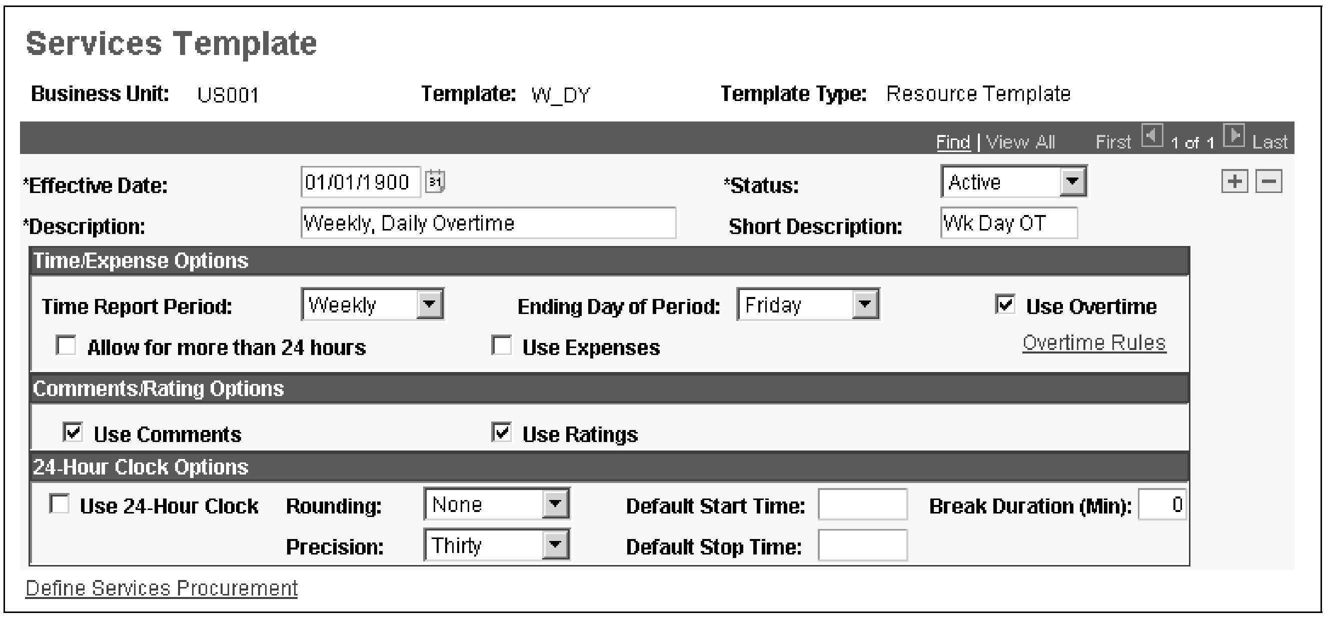
Page Name	Object Name	Navigation	Usage
Preferred Merchant	EX_MERCHANT	Services Procurement, Define Services Procurement Click the Preferred Merchant link in the Time and Expense Setup group box.	Define a preferred merchant that you can include in an expense type. When you define an expense type, you 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.
Services TRC Codes	SPA_TRC_CODES	Set Up Financials/Supply Chain, Product Related, Services Procurement, Time and Expense, Time Reporting Codes Services Procurement, Define Services Procurement Click the Time Reporting Codes link in the Time and Expense Setup group box.	Define time reporting codes.
Pay Types by TRC	SPA_TRC_PAYTYPE	Set Up Financials/Supply Chain, Product Related, Services Procurement, Time and Expense, Time Reporting Codes Services Procurement, Define Services Procurement Click the Time Reporting Codes link in the Time and Expense Setup group box. Click on the Pay Types link on the Services TRC Codes page.	Enter the Pay Types for the TRC. **Note.** This link is only available if the SP Pay Types Enabled check box is selected. You can only view the rate breakdown of the TRC for timesheets with overtime.
Services Procurement Pay Types	SPB_PAY_TYPE	Services Procurement, Define Services Procurement Click the Pay Types link in the Pay Types and Markups group box.	Enter labels for Services Procurement Pay Types. **Note.** This page is only available if the SP Pay Types Enabled check box is selected on the Service Procurement Installation Options page.
Maintain Markups by Service Type	SPB_SRVC_MRKUP	Services Procurement, Define Services Procurement Click the Markups by Service Type link in the Pay Types and Markups group box.	Define maximum vendor markups by service type. **Note.** This page is only available if the SP Pay Types Enabled check box is selected on the Service Procurement Installation Options page.

Page Name	Object Name	Navigation	Usage
Maintain Markups by Region	SPB_RGN_MRKUP	Services Procurement, Define Services Procurement Click the Markups by Region link in the Pay Types and Markups group box.	Define maximum vendor markups by region. **Note.** This page is only available if the SP Pay Types Enabled check box is selected on the Service Procurement Installation Options page.

Creating Services Templates

To set up services templates, use the SPA Time Template component.

Access the Services Template page.



Services Template page

The fields that appear on this page depend on the selected template type. You can define a resource template, which is used for time and expense reporting, or a deliverables template, which is used for progress reporting.

The template determines how the service provider will log time or progress against a work order.

Resource Template Type

Time Report Period — Select a period that indicates how often service providers enter their work hours. The default value is *Weekly.* Other options are: *Daily, Bi-Weekly, Semi-Monthly,* and *Monthly.*

Ending Day of Period — Select the day of the week to specify the ending day for the time reporting period. The default value is *Friday.*

Allow for more than 24 hours — Select if a service provider is allowed 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.

Use Overtime	Select if service providers enter a TRC on the Time/Expense Summary page. If cleared, the system uses the default TRC entered on the Services Procurement Business Unit Options page to calculate time and expense totals and invoice amounts.
Overtime Rules	Click to access the Overtime Rules page. This link appears if you selected the Use Overtime check box.
Use Expenses	Select if service providers report expenses with time reports. **Note.** This check box is only accessible if the Use Expenses check box on the Services Procurement Business Unit Definition page is selected.
Use Comments	Select to allow service providers and provider contacts to enter comments or concerns on the timesheet and progress log.
Use Ratings	Select if the performance of a service provider during the time period will 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 24–Hour Clock	Select if you want the service provider to enter time using stop and end times rather than total hours worked.
Rounding	Select whether you want to round up or down to the hour. Select *None* if you do not wish to round the minutes.
Precision	Select the number of precise minutes for rounding. Options are: *Six,Twelve,Fifteen,Twenty,*and *Thirty.*
Default Start and End Time	Enter the default start and end times to be defaulted onto the timesheet. The user can override these values.
Break Duration (Mins)	Enter the break duration in number of minutes. The break duration will be subtracted from the total time difference between the start and end dates. For example, if you have a start time of 8:00 am and end time of 5:00 pm with a 30 minute break duration, 8.5 hours will be recorded for the day.

Deliverables Template Type

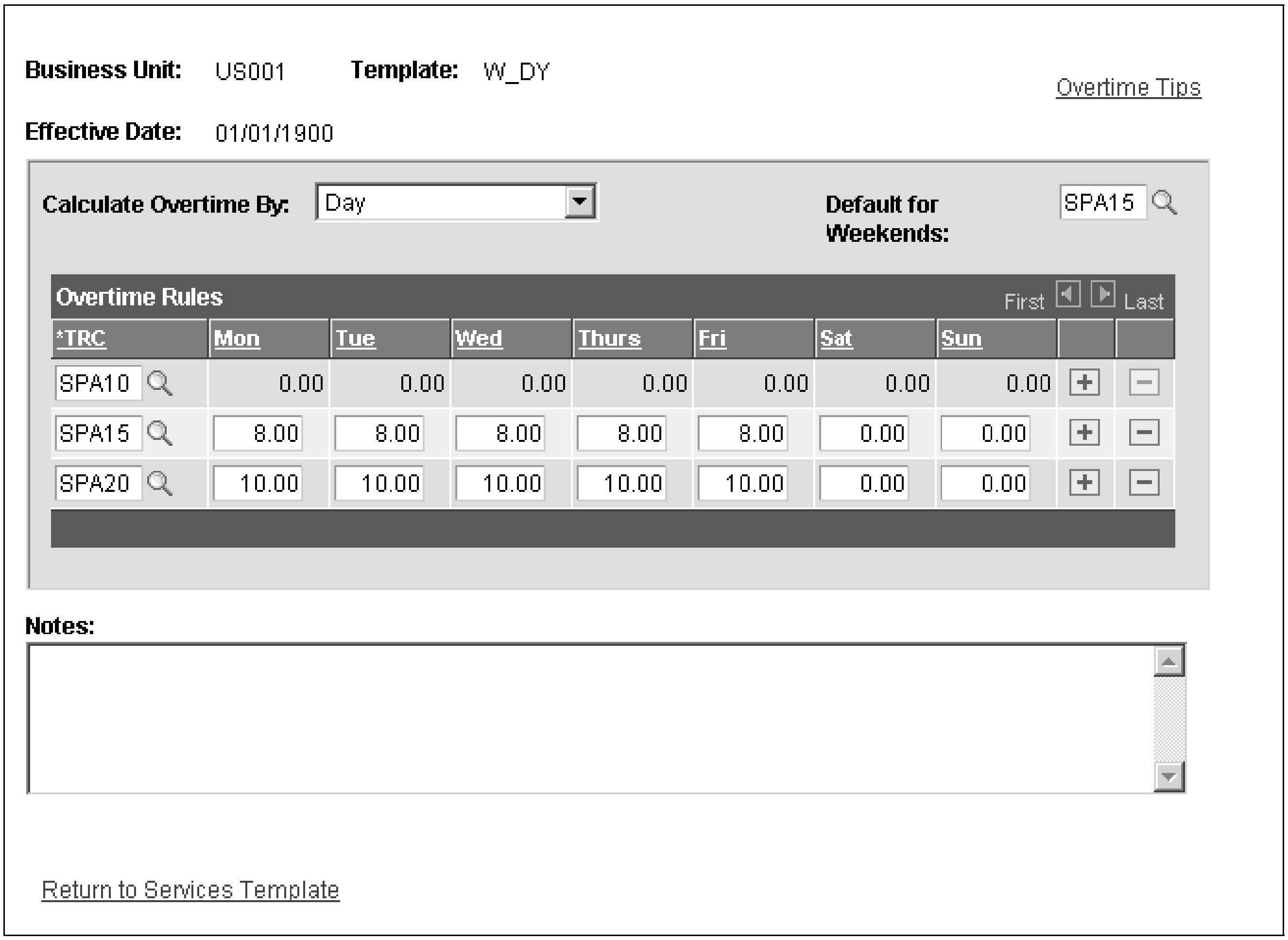
Settlement Options	Select to determine how services are settled, based on progress log entries. Your options include: • *Fixed Amount:* payments are made based on a fixed amount against milestone activities. The supplier enters the amount to be paid for each milestone on the progress log. • *Milestone:* payments are made when agreed upon milestones are met. The amount paid is defined on the work order. For example, you could agree to pay your construction company 25% of the total fee when the

foundation is complete. The supplier selects the milestone on the progress log and the amount is filled in and the supplier can not change it.

- *Percentage:* payments are made based on the progress log entry for percentage of the total work order amount.
- *Rate Based:* payments are based on an agreed upon rate for the quantity of work performed for each activity.

Defining Overtime Rules

To set up overtime rules, click the Overtime Rules link on the Services Template Component.



Overtime rules

Overtime rules are used to calculate the hours by TRC code when time is entered. If pay types are enabled on the Services Procurement Business Unit, overtime rules may also be used to indicate that different supplier rates are to be used, depending on pay types linked to a TRC code.

Calculate Overtime By

You can opt to calculate overtime by *Day* or by *Time Period.*

If by day is selected, then the daily threshold matrix is available for entry. If by time period is selected, then the period thresholds are available for entry. For the daily option, the hours for that day are split out by TRC code when entering time. For the period option, standard hours will exist for each day, up until the first or second threshold is reached on the time line.

Default for Weekends Select the default time reporting code for weekends. For example, if you pay double time for working the weekends, select a time reporting code with a multiplication factor of 2.

TRC Enter the Time Reporting code to be paid for working hours between the current threshold and the next threshold. In the page shot above, you will pay standard time for up to 8 hours. time and a half between 8 and 10 hours and double time after 10 hours. Weekends will be paid at time and a half.

Defining Expense Distance Rates

Access the 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 will 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

To set up expense types, use the Expense Types Component.

Access the Expense Types1 page.

Use expense types to identify and classify valid business expenses that service providers incur.

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.

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 TRC Codes

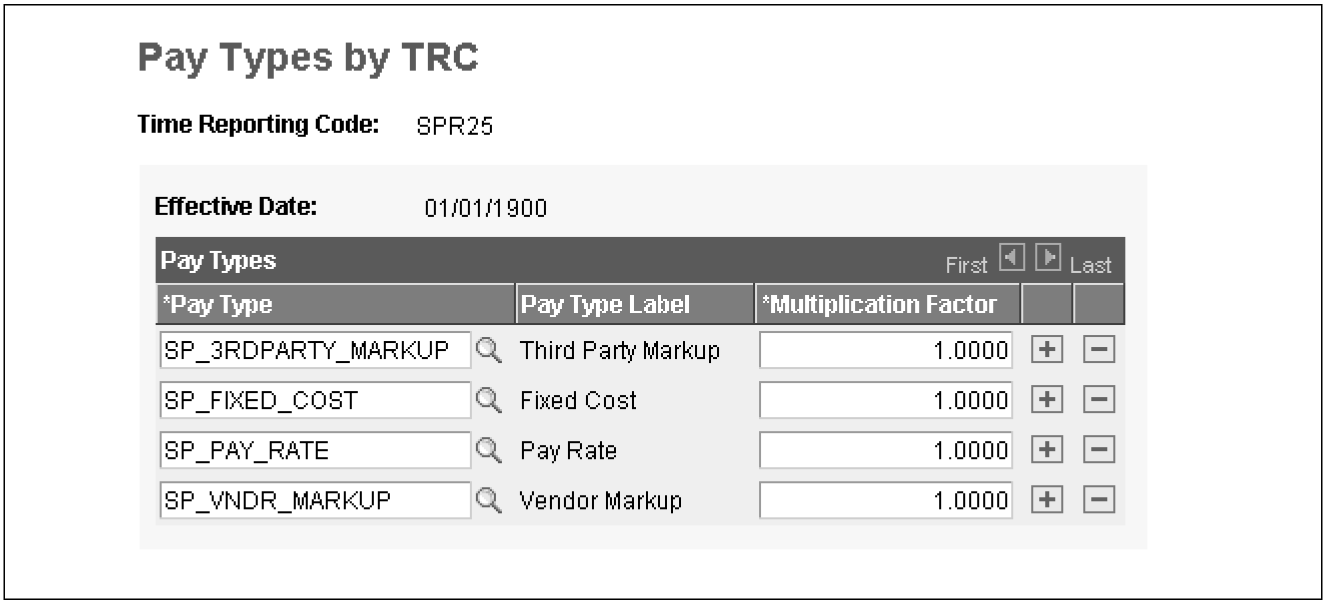
To set up time reporting codes, access the Services TRC Codes page.

The system uses TRC information as a multiplication factor when determining the amount used to update the associated work order as well as for invoicing. A TRC is associated with every time and expense line.

TRC Type	Displays the TRC type. PeopleSoft Services Procurement uses only hourly (H) TRC types. TRC types of amount (A) and units (U) do not apply to this application.
Multiplication Factor	Define the multiplication factor for the TRC. The system uses the value that you enter when calculating time and expense amounts.
Pay Types	Associate pay types with time reporting codes. Available only if pay types are enabled in the Services Procurement Installation Option page.

Pay Types by TRC

To access the pay types by TRC, click on the Pay Types link on the Services TRC component.



Pay Types by TRC page

Use pay types by TRC to determine how you pay your supplier. For example, you can have an agreement that you pay all pay types (pay rate, fixed cost, 3rd party markup, vendor markup) for hours 0 - 8. After 8 hours you might only pay the pay rate and fixed cost, and no markups. In this case you would create two TRCs, one with all 4 pay types, one with only pay rate and fixed cost. You would then create a services time template with overtime enabled. On the overtime rules you will use the two new TRCs 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 will pay to the supplier

Multiplication Factor Select the multiplication factor for the pay type. The value defaults from the Services TRC multiplication factor, but you can override the value.

Setting Up PeopleSoft Services Procurement Pay Types

To set up pay types, use the Services Procurement Pay Types component.

Access the Services Procurement Pay Types page

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.

Entering Markups by Service Type

Defining markups by service type allows you to 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 checks to see if 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 will be done on the vendor markups.

To set up Markups by Service Type, access the Maintain Markups by Service Type page.

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

Max 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.

Entering Markups by Region

Defining markups by region allows you to set limits on the vendor markups for particular region. You can define the maximum markup as an amount or as a percentage. When the vendor bids on a requisition, the system checks to see if 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 will be done on the vendor markups.

To set up markups by region, access the Maintain Markups by Region page.

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

Max 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.

Setting Up Users

User registration is a key step in implementing a PeopleSoft Services Procurement system.

This section provides an overview of user roles and discusses how to:

- Set up requesters.
- Register service coordinators.
- Register provider contacts.
- Register service providers.
- Set up user profiles.
- Set up user preferences.
- Set up requester user defaults.
- Set up role actions.

Understanding User Roles

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

Enterprise users:

- Requester.
- Service coordinator (employee).
- Approver.
- Services procurement analyst.
- Administrator.
- Invoice manager.

Supplier users:

- Service provider.
- Provider contact.
- Service coordinator (nonemployee).
- 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 Services Procurement Person ID to automatically generate the person ID.

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.

Pages Used to Set Up Users

Page Name	Object Name	Navigation	Usage
Requester Setup	REQUESTOR_TBL	Services Procurement, Define Services Procurement Click the Requester link in the Services Users Setup group box.	Set up requesters.

Page Name	Object Name	Navigation	Usage
Register Service Coordinator	SPB_PERSON_PAGE	• Services Procurement, Maintain Users, Service Coordinator • Services Procurement, Define Services Procurement Click the Service Coordinator link in the Services Users Setup group box.	Register service coordinators.
Service Coordinator Information	SPB_COORDINATOR_PG, SPB_COOD_EMPL_PG	Click the Service Coordinator Information link on the Register Service Coordinator page.	Enter employee and vendor details.
Person Registration Phone and Email Details	SPB_USR_PH_EM_PAGE	Click the Phone and Email Details link on the Register Service Coordinator page.	Enter phone and email contact information.
Register Provider Contact	SPB_SP_PERS_PAGE	• Services Procurement, Maintain Users, Provider Contact • Services Procurement, Define Services Procurement Click the Provider Contact link in the Services Users Setup group box.	Register provider contacts.
Provider Contact Information	SPB_PROV_CNTCT_PG	Click the Provider Contact Information link on the Register Provider Contact page.	Enter vendor details.
Register Provider Contact Phone and Email Details	SPB_USR_PH_EM_PG2	Click the Phone and Email Details link on the Register Provider Contact page.	Enter phone and email contact information.
Register Service Provider	SPB_PERS_PROV_PAGE	• Services Procurement, Maintain Users, Service Provider • Services Procurement, Define Services Procurement Click the Service Provider link in the Services Users Setup group box.	Register service providers.
Service Provider Information	SPB_PROVIDER_PG, SPB_INDP_PROV_PG	Click the Service Provider Information link on the Register Service Provider page.	Enter vendor details, locations, and project information.

Page Name	Object Name	Navigation	Usage
Provider Skills	SPB_PROV_SKILL_PG	Click the Provider Skills link on the Service Provider Information page.	Enter provider competencies.
Register Service Provider Phone and Email Details	SPB_USR_PH_EM_PG3	Click the Phone and Email Details link on the Register Service Provider page.	Enter phone and email contact information.
Maintain Service Provider	SPB_PERS_PROV_PAGE	Services Procurement, Define Services Procurement Click the Service Provider link in the Services Users Setup group box.	Maintain service providers.
User Profiles - General	USER_GENERAL	PeopleTools, Security, User Profiles, User Profiles, General	Define general profiles.
User Profiles - ID	PSOPRALIAS	PeopleTools, Security, User Profiles, User Profiles Select the ID tab.	Define ID profiles.
User Profiles - Roles	USER_ROLES	PeopleTools, Security, User Profiles, User Profiles Click the Roles tab.	Define role profiles.
User Profiles - Workflow	USER_WORKFLOW	PeopleTools, Security, User Profiles, User Profiles Click the Workflow tab.	Define workflow profiles.
Process Group Permission	ACL_PROCESS_GROUPS	PeopleTools, Security, Permissions and Roles, Permission List Click the Process tab, and then click the Process Group Permission link.	Define process group permissions.
User Preferences	PV_OPR_LINKS	Services Procurement, Define Services Procurement Click the User Preferences link in the Services Users Setup group box.	Enter overall and procurement preferences.
Overall Preferences	OPR_DEF_TABLE_FS1	Services Procurement, Define Services Procurement Click the User Preferences link in the Services Users Setup group box. Click the Overall Preferences link on the User Preference page.	Capture the default business unit and default setID for the requester, and add all other users.

Page Name	Object Name	Navigation	Usage
Procurement Preferences	OPR_DEF_TABLE_PM1	Services Procurement, Define Services Procurement Click the User Preferences link in the Services Users Setup group box. Click the Procurement Preferences link on the User Preference page.	Enter requester preferences. Without the procurement preference, the requester is not permitted to create requisitions.
Service Requester Defaults	SPB_REQ_USR_DEF_PG	Services Procurement, Maintain Users, Service Requester Defaults	Set up preferences for requester user defaults. When you create a new requisition or work order, data from this page appears by default on the requisition and work order pages.
Service Coordinator Defaults	SPB_SRVC_USRDEF_PG	Services Procurement, Maintain Users, Service Coordinator Defaults	Set up preferences for service coordinators. To set up defaults for service coordinators, use the Service Coordinator Defaults component.
Role Actions	PV_ACTION	Services Procurement, Define Services Procurement Click the Role Actions link in the Services Users Setup group box.	Add your user roles to delivered role actions.

Setting Up Requesters

Access the Requester Setup page.

Note. A user profile must be created for the approver before you can set up the requester.

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, the system allows you to 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.

Registering Service Coordinators

To register service coordinators, use the Service Coordinator component.

Access the Register Service Coordinator page.

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

A service coordinator is an employee or nonemployee 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.

Registering Provider Contacts

To register provider contacts, use the Provider Contact component.

Access the Register Provider Contact page.

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

Registering Service Providers

To register service providers, use the Service Provider component.

Access the Register Service Provider page.

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

A service provider is a person who can record and view time and expense information.

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 make the service provider 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.

Do not change the value *NEXT* for the Person ID field when adding a service provider. The system generates the person ID.

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 should be 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.

Setting Up User Profiles

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, you must register them on the User Setup page.

To set up user profiles:

1. Access the User Profiles page and enter a user ID, using all capitals.
2. On the User Profiles - General page, enter the required values, particularly email and address information.

   Note. To run either the Datamart Application Engine process, the Invoicing Application Engine process, or Crystal reports, 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:

User Roles	Role Names
Requester	EMPLOYEE PeopleSoft User SP_INVOICE_MANAGER SP_REQUESTER
Service Coordinator	EMPLOYEE / Supplier-External-User PeopleSoft User SP_COORDINATOR
Service Provider	SP_PROVIDER Supplier-External-User
Service Provider Contact	SP_PROVIDER_CONTACT SP_SUPPLIER_INVOICE_APPROVER Supplier-External-User
Approver	EMPLOYEE EOPP_USER PeopleSoft User SP_APPROVER SP_REQUESTER
Administrator	EMPLOYEE EOPP_USER PeopleSoft User SP_ADMINISTRATOR Security Administrator

Warning! The *Person ID* selected on the user profile *Services Procurement Person* field *MUST* be unique. The person ID is used for sending 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 or Crystal reports, in the Process Group field, select *POALL, GLALL, FSALL,* or *TLSALL*.

Setting Up User Preferences

Access the User Preferences page.

You must set up user preferences for all requesters. You must also enter user preferences for service coordinators so that service coordinators can authorize requesters to create and manage requisitions. 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

Service Requester Defaults allow for easier service requisition entry. Defaults defined on this page are used on the requisition, simplifying the requisition entry process.

To set up service requester defaults, access the Service Requester Defaults page

Projects BU	Enter the default Projects business unit. If the default project BU is already defined for the project user preferences, the value will be display only.
Project	Enter the default Project for which the requester will be entering service requisitions.
Service Type	Select the default service type.
Project Role	Select the default role/service.
Service Coordinator	Select the default service coordinator who will be sourcing the requisition.

Time Approver Select the default time approver. Valid values are users who have at least one of the roles defined in the role query *SP_TIME_APPROVER*

Invoice Approver Select the default invoice approver. Valid values are users who have at least one of the roles defined in the role query *SP_APPROVER*

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

Requisition Notification Method Select the notification method for requisitions.

Notify on End Date/Consumption Select *Yes*to enable work order alerts. The process scheduler must be running in order for notifications to occur.

Days in Advance for Alert Enter the number of days before the work order end date that the system should notify the user that the work order is nearing the end date.

Alert when % Consumed Enter the work order consumption percentage at which the system needs to notify the user.

Alert Notification Method Select whether the alert notification must be sent using a worklist only or email and worklist.

Role to Notify Select the role that the system needs to notify of the work order. Values are: *Inv Approv*, *Requestor*, or *Time Appr*.

May Enter Work Order Select if the user can add new work orders.

May Extend Work Order Select if the user is authorized to extend the duration of the work order contract.

Note. Selecting this check box enables users to extend work order agreements.

Authorized to Source to Preferred Suppliers Select if this user is authorized to source requisitions to preferred suppliers.

Note. Selecting this check box enables users to source requisitions to preferred suppliers on the Sourcing Details section of the requisition.

Setting Up Service Coordinator Defaults

To set up service coordinator defaults, access the Service Requester Defaults page.

Projects BU Enter the default Projects business unit. If the default project BU is already defined for the project user preferences, the value will be display only.

Project Enter the default Project for which the requester will be entering service requisitions.

Service Type Select the default service type.

Project Role Select the default role/service.

Time Approver Select the default time approver. Valid values are users who have at least one of the roles defined in the role query *SP_TIME_APPROVER*

Invoice Approver	Select the default invoice approver. Valid values are users who have at least one of the roles defined in the role query *SP_APPROVER*
Allow Time/Expense Overage %	Select the default tolerance for time and expense.
Requisition Notification Method	Select the notification method for requisitions.
Notify on End Date/Consumption	Select *Yes*to enable work order alerts. The process scheduler must be running in order for notifications to occur.
Days in Advance for Alert	Enter the number of days before the work order end date that the system should notify the user that the work order is nearing the end date.
Alert when % Consumed	Enter the work order consumption percentage at which the system needs to notify the user.
Alert Notification Method	Select whether the alert notification must be sent using a worklist only or email and worklist.
Role to Notify	Select the role that the system needs to notify of the work order. Values are: *Inv Approv, Requestor,* or *Time Appr.*
May Enter Work Order	Select if the user can add new work orders.
May Extend Work Order	Select if the user is authorized to extend the duration of the work order contract.

Note. Selecting this check box enables users to extend work order agreements.

Authorized to Delegate	Select if this user is authorized to delegate another service coordinator to source a requisition.
Authorized to Change Sourcing Rules	Select if this user is authorized to update the sourcing rules defined on the requisition when sourcing.

Set Up Role Actions

Role actions are used to specify what roles can perform specific actions within the application. The delivered services procurement role actions begin with SP.

SP_APPROVER	Enables you to approve invoices.
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 flags) associated to the project on the requisition.
SP_HIDE_SOURCING_PG	Hides the sourcing preferences functionality from the requisition. It disables the sourcing preferences from the PeopleSoft Services Procurement requisition page, disallowing the requester to specify preferred vendors.
SP_IGNORE_REAPPR	Does not initiatie the reapproval process for the roles assigned to this role action, when the requisition is filled with higher rate.

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_SRVC_COORDINATOR	Determines which user roles can source requisitions.
SP_TIME_APPROVER	Determines which user roles can approve timesheets, expenses and progress logs.
WF_REAAPR_REQUIRED	Enables the user roles to edit a few fields (service coordinator, time approval, Competency Description) on the requisition even after it’s approved or sourced.

Configuring the Supplier Network

Use the supplier network to define and categorize your pool of available suppliers. The supplier pool or network is leveraged to manage the sourcing portion of the requisition process.

This section discusses how to:

- Enter supplier information.
- Manage service supplier information.
- Create the supplier network.
- Search, review, and edit supplier information.

Pages Used to Configure the Supplier Network

Page Name	Object Name	Navigation	Usage
Identifying Information	VNDR_ID1	• Vendors, Vendor Information, Add/Update, Vendor • Services Procurement, Define Services Procurement Click the Supplier Info link in the Services Supplier Network group box.	Enter supplier information.
Address	VNDR_ADDRESS	Click the Address tab from the Identifying Information page.	Enter supplier address information.
Phone Information	VNDR_ADDR_PHN_SEC	Click the Telephone link at the bottom of the Address page.	Record supplier phone numbers.
Location	VNDR_LOC	Click the Location tab from the Identifying Information page.	Enter supplier location information.
Vendor Contacts	VNDR_CNTCT	Click the Contact tab from the Identifying Information page.	Enter contact information.
Service Supplier Info	VENDOR_SPRO_PG	• Services Procurement, Define Service Suppliers, Services Details • Services Procurement, Define Services Procurement Click the Services Supplier Info link in the Services Supplier Network group box.	Manage service supplier information. Enter additional service supplier details.
Supplier Network	SPM_SPLR_BY_BU_PG	• Services Procurement, Define Service Suppliers, Suppliers by Business Unit • Services Procurement, Define Services Procurement Click the Supplier Network link in the Services Supplier Network group box.	Create the supplier network. Associate suppliers with PeopleSoft Services Procurement business units.

Entering Supplier Information

Access the Identifying Information page.

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

Classification	Select *Supplier.*
Status	Select *Approved.*
Persistence	Select *Regular.*

Entering Services Supplier Information

To set up services supplier information, use the Maintain Services Supplier component.

Access the Services Supplier Info page.

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*.
Remit to Location	Select the default remit to location. Values come from the standard vendor table.
Woman Owned	Select if the vendor is woman owned.
Internal Supplier	Select if the supplier is internal.
Minority Owned	Select if the vendor is minority owned.
Include in Invoice Approval	Select if invoices should be routed to the supplier for approval before being routed internally for approval.
Ethnicity	If the vendor is minority owned, selected the ethnicity of the owner.
Score	Displays the supplier score as determined from data analysis.

Creating the Supplier Network

To set up the supplier network, use the Supplier by Business Unit component.

Access the Supplier Network page.

The supplier network is the basic method of defining supplier sourcing rules. If you have not defined suppliers by region/service/service type, the sourcing selection page will allow you to source to any supplier in your network. The supplier network is also used when selecting a vendor on a manual work order.

Score	Click to access the Supplier Scoring Results page, where you can view the total rule score for that supplier.
Maximum Submittal Limit	Enter the maximum number of bids a supplier can submit per requisition.

Setting Up Suppliers by Service Type and Region

To set up services by supplier, use the Services by Supplier component.

This section discusses how to:

- Build the region hierarchy using the tree manager.
- Set up service suppliers by region.

Pages Used to Set Up Suppliers by Service Type and Region

Page Name	Object Name	Navigation	Usage
Region Codes	REGION_CD	Services Procurement, Define Services Procurement Click the Service Region Codes link in the Rate Sheet Definition group box.	Set up region codes.
Tree Definitions and Properties	PSTREEDEFN	Tree Manager, Tree Manager	Build your region tree hierarchy.
Regions by Supplier	SPB_SPLR_REGION_PG	Services Procurement, Define Services Procurement Click the Regions by Supplier link in the Supplier Setup group box.	Associate regions with suppliers.
Suppliers By Region	SPB_REGION_SPLR_PG	Services Procurement, Define Services Procurement Click the Supplier by Region link in the Supplier Setup group box.	Set up service suppliers by region.
Service Types By Suppliers	SPB_ROLETYPEBYSUPL	Services Procurement, Define Services Procurement Click the Service Type By Suppliers link in the Resource group box.	Associate service types with resource suppliers.
Suppliers By Service Types	SPB_SUPLBYROLETYPE	Services Procurement, Define Services Procurement Click the Suppliers by Service Type link in the Resource group box.	Associate resource suppliers with service types.
Regions/Service Types by Supplier	SPB_SPLR_REGSER_PG	Services Procurement, Define Services Procurement Click the Regions/Service Type by Supplier link in the Resource group box.	Associate active resource suppliers with regions and service types, and associate regions and service types with a resource supplier.

Page Name	Object Name	Navigation	Usage
Suppliers by Region/Service Type	SPB_REGSER_SPLR_PG	Services Procurement, Define Services Procurement Click the Supplier by Region/ Service Type link in the Resource group box.	Associate regions and service types with active resource suppliers, and associate resource suppliers with both regions and service types.
Region/Service by Supplier	SPB_SPLR_REGROL	Click the Region/ Service by Supplier link in the Deliverable group box.	Associate regions and services with deliverables suppliers.
Suppliers by Region/Service	SPB_REGROLE_SPLR	Click the Region/ Service by Supplier link in the Deliverable group box.	Associate deliverables suppliers with regions and services.
Services by Supplier	SPB_PROJROLEBYSUPL	Click the Services by Supplier link in the Deliverable group box.	Associate services with deliverables suppliers.
Supplier by Service	SPB_SPLR_PROJROLE	Click the Region/ Service by Supplier link in the Deliverable group box.	Associate deliverables suppliers with services.

Building the Region Hierarchy

Use the region hierarchy tree structure to graphically build your Supplier by Region and Rate Sheets by Region components. 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 should only be used if the Use Region Tree Structure check box is selected on the Services Procurement Installation Options. If the check box is not selected, there is no parent child relationship between the different 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 your 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.

Setting Up Service Suppliers by Region

To set up suppliers by region, use the Suppliers by Region component.

Access the Suppliers By Region page.

Notification Method	Select *Email and Worklist* or *Worklist only* as the default notification method. When you source a requisition to a supplier by region, the default notification method that you select on this page appears by default as the source method.
Max Submittal Limit (maximum submittal limit)	Enter the maximum number of times that a supplier can source a bid for a specific requisition. This integer value can be between 1 and 99.

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

Setting Up Suppliers by Service Type

To set up suppliers by service type, use the Services by Supplier component.

Access the Supplier by Service Type page.

Only suppliers who are type *Resource* or *Both* can be selected.

Setting up Suppliers by Region/Service Type

To set up suppliers by region/service type, use the Suppliers by Region /Service Type component.

Access the Suppliers by Region/Service Type page.

Only suppliers who are type *Resource* or *Both* can be selected.

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

Setting up Suppliers by Service

To set up suppliers by service, use the Suppliers by Service component.

Access the Suppliers by Service page.

Only suppliers who are type *Deliverable* or *Both* can be selected.

Setting up Suppliers by Region/Service

To set up suppliers by region/service, use the Suppliers by Region/Service component.

Access the Suppliers by Region/Service page.

Only suppliers who are type *Deliverable* or *Both* can be selected.

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

Setting Up Logistical Tasks

To set up logistical tasks groups, use the Logistical Task group component. To associate tasks to a task group, use the Assign Tasks to Task Groups component. To assign task groups to service types, use the Assign Task Group to Service Type component.

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.

This section discusses how to define logistical tasks.

Pages Used to Set Up Logistical Tasks

Page Name	Object Name	Navigation	Usage
Logistical Task	SPB_TASK_PG	Services Procurement, Define Services Procurement Click the Logistical Task link in the Logistical Support group box.	Define logistical tasks.
Logistical Task Groups	SPB_TASK_GROUP_PG	Services Procurement, Define Services Procurement Click the Logistical Task Groups link in the Logistical Support group box.	Define logistical task groups.
Tasks by Task Groups	SPB_TASKTOGROUP_PG	Services Procurement, Define Services Procurement Click the Task by Task Groups link in the Logistical Support group box.	Define logistical tasks by task group.
Task Group by Service Type	SPB_ROLE_TASKGP_PG	Services Procurement, Define Services Procurement Click the Task Group by Service Type link in the Logistical Support group box.	Define task groups by service type.

Defining Logistical Tasks

To establish logistical tasks, use the Logistical Task component.

Access the Logistical Task page.

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

Original: Select to associate logistical tasks for a normal work order.

Extension: Select to associate logistical tasks for an extended work order.

Both: Select to associate logistical tasks for both normal and extended work orders.

Execution Type

Select work order execution type. Options 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.

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

Approval Type

Select work order approval type. Options are:

*Pre-approval:*Select if tasks must be completed after creating the work order and before approving the work order. 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 submitting the work order 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 work order release date and before closing the work order. For example, off-board logistical tasks might include collecting laptop or closing the email account after the service provider has quit the job.

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.

Options are: *Invoice Approver, Requester, Time Approver,*and *Other*

Set Up File Attachment Servers

In this section, we discuss how to set up servers to store your event PDFs and XML.

page Used to Attach Files

Page Name	Object Name	Navigation	Usage
Maintain File Att Servers	PV_ATT_SRV_ADMIN	Set Up Financials/Supply Chain, Utilities, Administer File Attachments, Administer Attachment Servers	Used to set up attachments for PDF and XML files included with notifications.

Setting up File Attachment Servers

Access the Maintain File Att Servers page.

1. Click the Add FTP Server button.
2. Enter the Login Name, Password, Server Name of *AUC_ATTACH*, and Pathname.
3. Repeat steps 1 and 2, and create a server named *AUC_TEMP*.

CHAPTER 4

Integrating With Other PeopleSoft and Third-Party Applications

This chapter provides an overview and discusses how to:

- Integrate with an accounts payables application.
- Integrate with PeopleSoft Projects.

Integrating With Accounts Payable 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.

Note. 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.

See Also

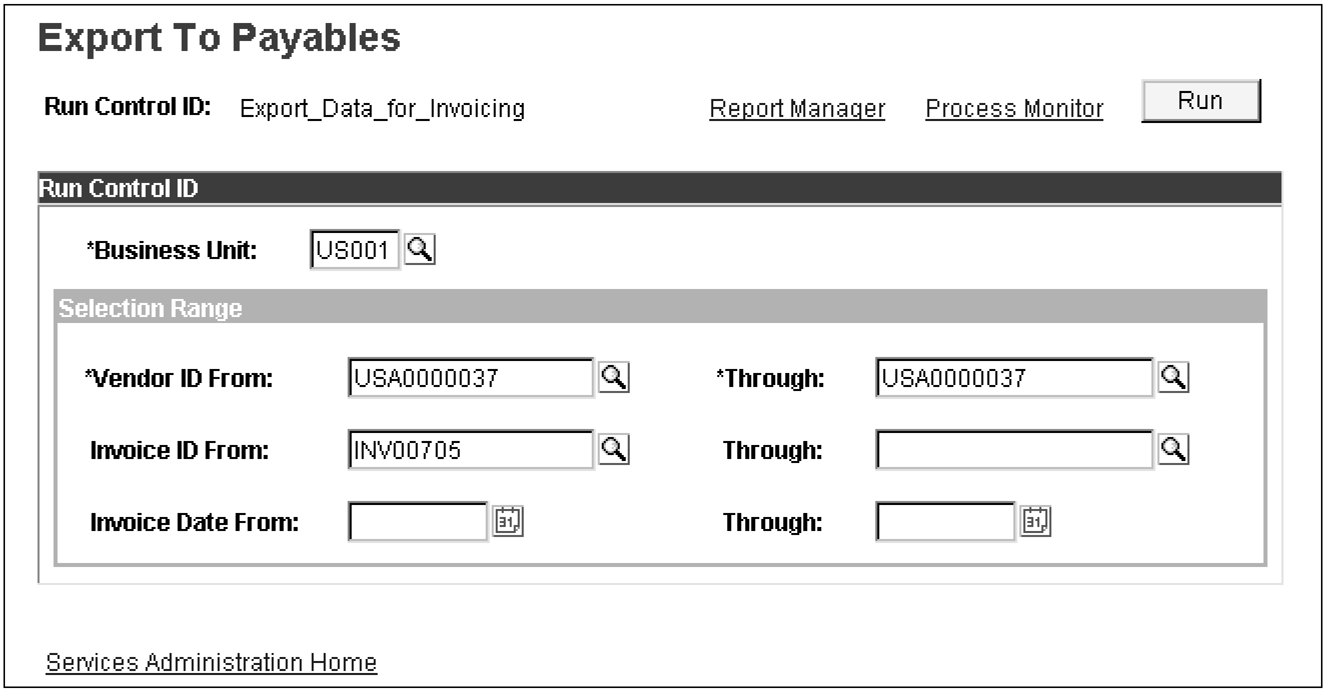
PeopleSoft Payables 8.8 PeopleBook, "Processing Batch Vouchers"

Page Used to Export Services Transactions for Invoicing

Page Name	Object 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.



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 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. After running the Export to Payables process, you use the Voucher Build process in PeopleSoft Payables to generate vouchers for the approved invoices posted to 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 Projects

This section lists a prerequisite and discusses how to export approved time and expense transaction data to PeopleSoft Projects.

Here are the steps:

1. Export approved time and expense information to a staging table.
2. In PeopleSoft Projects, run the process to import staging table data into PeopleSoft Project tables.

Note. PeopleSoft Services Procurement only exports resource-based transactions to PeopleSoft Projects. Deliverables-based transactions (progress log data) are not exported to PeopleSoft Projects.

Prerequisite

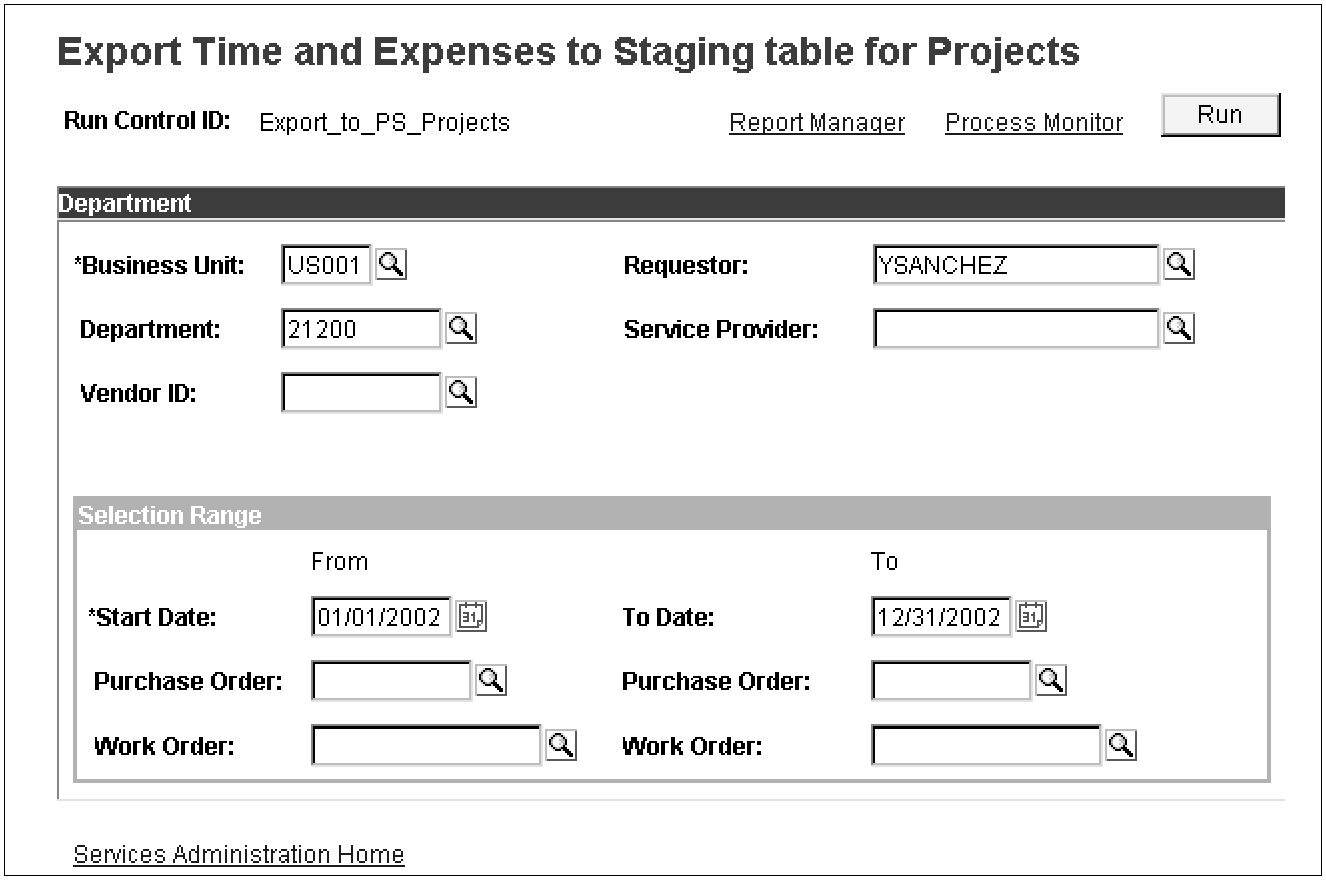
You must obtain the objects required for the integration between PeopleSoft Services Procurement and PeopleSoft Projects. To obtain these objects, you must apply relevant Projects' incidents located on PeopleSoft Customer Connection.

Page Used to Stage Time and Expenses to PeopleSoft Projects

Page Name	Object Name	Navigation	Usage
Export Time and Expenses to Staging table for Projects	SPF_PROJ_EXP	Services Procurement, Manage Projects and Activities, Send Time/Expenses to Projects	Define run control parameters for exporting time and expense data to a staging table.

Exporting Time and Expense Data to PeopleSoft Projects

Access the Export Time and Expenses to Staging table for Projects page.



Export Time and Expenses to Staging table for Projects page

Define the parameters used to export the time and expense data.

Process Results

The PeopleSoft Application Engine process (SPA_PROJ_EXP) exports approved time and expense transaction data from PeopleSoft Services Procurement time and expense tables to the Project Resource staging table (SP_PROJ_RES_STG).

Note. You run the PC_SP_TO_PC Application Engine process in PeopleSoft Projects to load the staged data into Projects.

CHAPTER 5

Implementing PeopleSoft Services Procurement Workflow

This chapter provides an overview of the workflow process and discusses how to:

- Configure the workflow system.
- Set up work order workflow.
- Use requisition approval workflow.
- Use work order approval workflow.
- Reassign tasks.

Understanding Workflow

PeopleSoft Services Procurement provides an easy-to-use workflow implementation process. All the steps in PeopleSoft Services Procurement workflow are performed using PeopleSoft Internet Architecture pages rather than underlying PeopleCode. Consequently, functional users can design and maintain workflow.

PeopleSoft Services Procurement leverages the PeopleSoft eProcurement workflow engine. Services requisitions use the same workflow rules as the PeopleSoft eProcurement requisition, so if you are using both applications, you only have to set up workflow for requisitions once. PeopleSoft Services Procurement 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. Approvals can be role based or driven by views. For work orders approvals, the system looks at the work order requestor's supervisor ID set on the User Profile - Workflow page to send the approval.

Also, PeopleSoft Services Procurement workflow provides email notifications and worklists for all activities in the requisition fulfillment 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 in the requisition fulfillment process.
- Automate parts of the sourcing process by defining sourcing rules on the Automatic Sourcing page.

See Also

"Preface," page xxiii

PeopleTools 8.44 PeopleBook: Workflow Technology

Configuring the Workflow System

This section discuss how to:

- Use the Maintain Workflow page.
- Set up workflow notifications.
- Specify automatic sourcing rules.

Pages Used to Configure the PeopleSoft Services Procurement Workflow System

Page Name	Object Name	Navigation	Usage
Maintain Workflow	PV_ADM_WORKFLOW	Services Procurement, Define Services Procurement Click the Maintain Workflow link in the Workflow Setup group box.	Configure a workflow system.
Workflow Notifications	SPB_WF_NOTIFY	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Workflow, Workflow Notifications • Services Procurement, Define Services Procurement Click the Workflow Notifications link in the Workflow Setup group box.	Enable or disable notifications for activities in the requisition fulfillment process.
Automatic Sourcing	SPF_AUTOSOURCE	Services Procurement, Define Services Procurement Click the Automatic Sourcing link in the Workflow Setup group box.	Specify the rules for automatic sourcing.
Define Template	WL_TEMPLATE	Services Procurement, Define Services Procurement Click the Notification Templates link in the Workflow Setup Group box.	Specify the content of email notifications that are used in PeopleSoft Services Procurement workflow.
Blackberry Email Responses	WL_TEMPL_RESP	Click the Blackberry Email Response tab from the Define Templates page.	Create email responses.

Using the Maintain Workflow page

Access the Maintain Workflow page.

You begin configuring PeopleSoft Service Procurement workflow options on the Maintain Workflow page. The Maintain Workflow page is the focal point for configuring your PeopleSoft Services Procurement workflow system.

Setting Up Workflow Notifications

To set up workflow notifications, use the Workflow Notification component.

Access the Workflow Notifications page.

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.

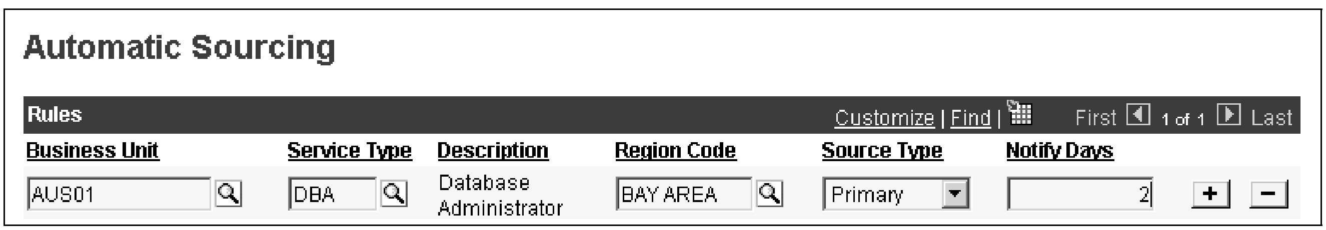
Note. You cannot configure Client Bid Response notification on this page. The notification method for client bid response is the same as the method chosen during sourcing.

A warning appears if both the email and worklist options are disabled for an activity.

Specifying Automatic Sourcing Rules

To set up autosource rules, use the Autosource component.

Access the Automatic Sourcing page.



Automatic Sourcing page

By filling in the Service Type field, you can 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 notify days. Once the notify days is 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 your selections on this page. So 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 enables you to not have to manually source each requisition.

- If service type and region code have values, the system looks for suppliers by service type and region and match 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 looks 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 fill in.

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.

Setting Up Work Order Workflow

This section discusses work order setup.

Pages Used to Set Up Work Order Workflow

Page Name	Object Name	Navigation	Usage
Approval Transaction Registry	SAC_AW_TXN	Set Up Financials/Supply Chain, Utilities, Approvals, Approval Transaction Registry	Set up the transaction registry.
Criteria Definition	SAC_CRITERIA	Click the Criteria link for a path or a step.	Define criteria for workflow approvals.
User List	SAC_USER_LIST	Set Up Financials/Supply Chain, Utilities, Approvals, User List	Set up user list definitions.
Approval Process	SAC_AW_PRCS_MAIN	Set Up Financials/Supply Chain, Utilities, Approvals, Approval Process	Define workflow approval process stages.
Generic Templates	WL_TEMPLATE_GEN	Set Up Financials/Supply Chain, Utilities, Approvals, Generic Templates	Use to add or change workflow notification templates.

Using Workflow Approval Setup

This section discusses workflow approval setup.

PeopleSoft Service Procurement delivers work order workflow preconfigured. We recommend using the delivered workflow configuration as is, but you can make minor adjustments for your business practices. We recommend that you understand the workflow technology before making any changes.

Changing Approval Criteria

To change workflow approval criteria:

1. Access the Approval Process Definition using the SP_WORKORDER value.

2. Click Criteria to access the Criteria page. For each path and step, you can set up criteria the system uses to determine whether you go down that path or execute 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 execute.

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 work orders.

   See *PeopleSoft eProcurement 8.8 PeopleBook*, “Using Workflow and Managing Approvals,” Defining Approval Workflow Processes.

Changing Approvers

To modify approvers:

1. Access the User List page using the SP_WORKORDER value.
2. The system is set up to use the value for the Supervisor field listed on the User Profile - Workflow page. If you want the workflow to select an approver by role, you change the User List Source to Role, and select a role from the prompt table.

   See *PeopleSoft eProcurement 8.8 PeopleBook*, “Using Workflow and Managing Approvals,” Defining User-List Definitions.

   See *PeopleSoft eProcurement 8.8 PeopleBook*, “Using Workflow and Managing Approvals,” Attaching Workflow Roles to Users.

Changing 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.

   See *PeopleSoft eProcurement 8.8 PeopleBook*, “Using Workflow and Managing Approvals,” Defining Notifications for Approval Workflow.

   See *PeopleSoft eProcurement 8.8 PeopleBook*, “Using Workflow and Managing Approvals,” Defining the Approval Transaction Registry.

Using Requisition Approval Workflow

This section discusses how to use the requisition approval process.

See Also

PeopleTools 8.44 PeopleBook: Workflow Technology

Pages Used for Requisition Approval Workflow

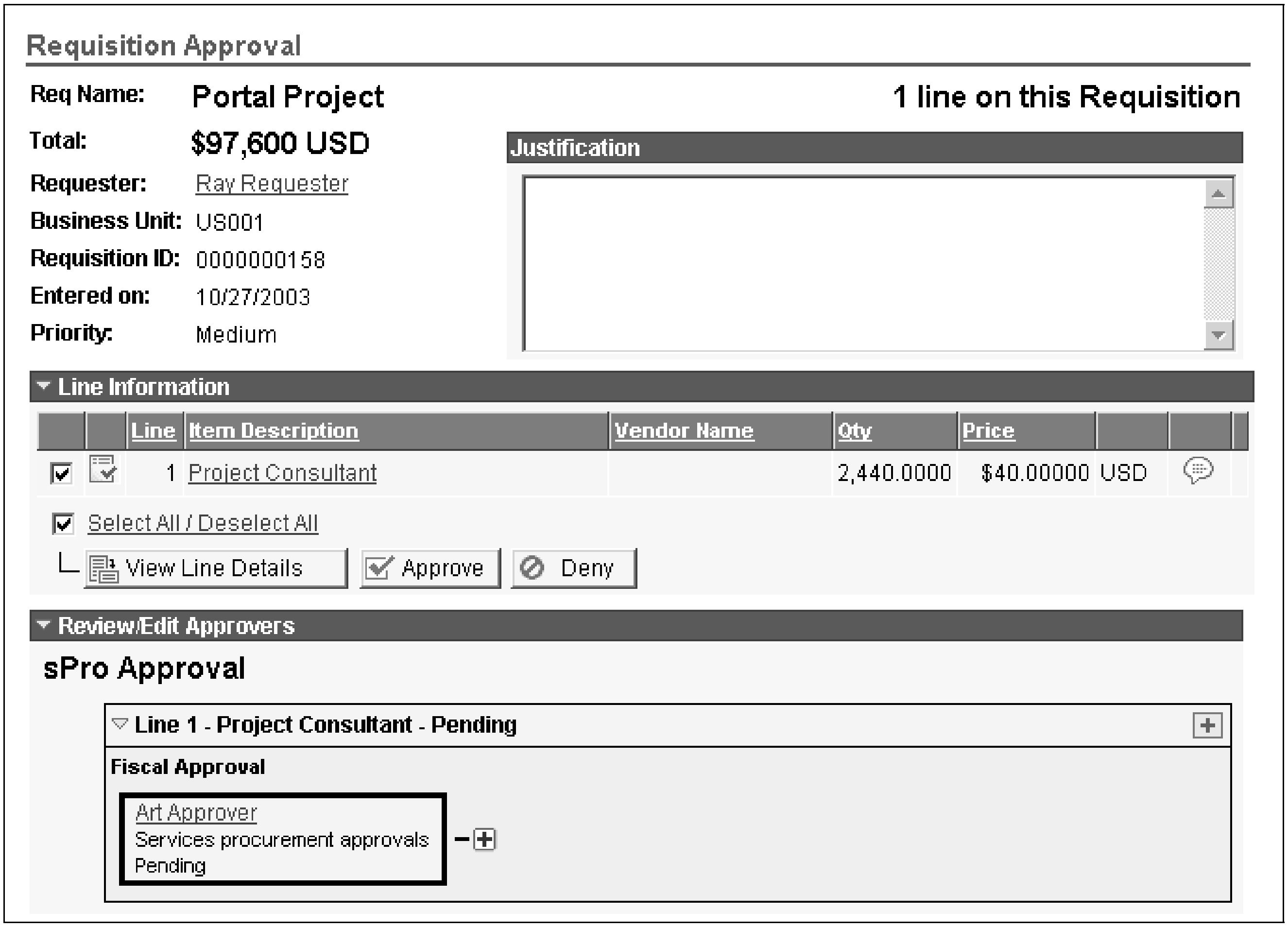
Page Name	Object Name	Navigation	Usage
Requisition Review	PV_REQ_APPROVAL	Home, Worklist. Select the requisition ID that needs approval.	Approve, deny, or hold a requisition during the workflow approval process.
Item Description	PV_NEW_ITM_DESCR	Click the linked item.	View the requisition line item description.
Comments	PV_REQ_APPLN_WK_COMMENTS	Click the Comments button.	View requisition comments.

Using the Requisition Approval Process

Use the Requisition Approval page to approve, deny, or hold 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.

Note. The user must have a workflow role designed for requisition approval, or else the user must be the requester who entered the requisition.

Access the Requisition Approval Process page.



Requisition Approval page (page 1 of 2)

Requisition Approval page (page 2 of 2)

Deny	Click to deny this requisition. A worklist entry is sent to the original requester with any comments the approver enters.
Hold	Click to pause requisition approval. Workflow doesn't proceed until you remove the hold.
Comment	Enter any comments explaining why you are approving or denying this requisition.

View Request Details Click to view detailed summary for the request.

Review/Edit Approvers

Click to enter another approver or reviewer for this work order. This approver is added after your approval. The system adds the work order to the new approver's Worklist and the approver must approve the work order before it can continue through the approval process. Any combination of approvers and reviewers can be added to this work order by adding rows using the Insert Approver button.

User ID Enter the ID for the user that you add as an approver or reviewer of this requisition.

Note. Once 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 on the worklist of the service coordinator responsible for sourcing the requisition.

Using the Work Order Approval Workflow

This section discusses how to use the work order approval process.

See Also

PeopleTools 8.44 PeopleBook: Workflow Technology

Paged Used for Work Order Approval Workflow

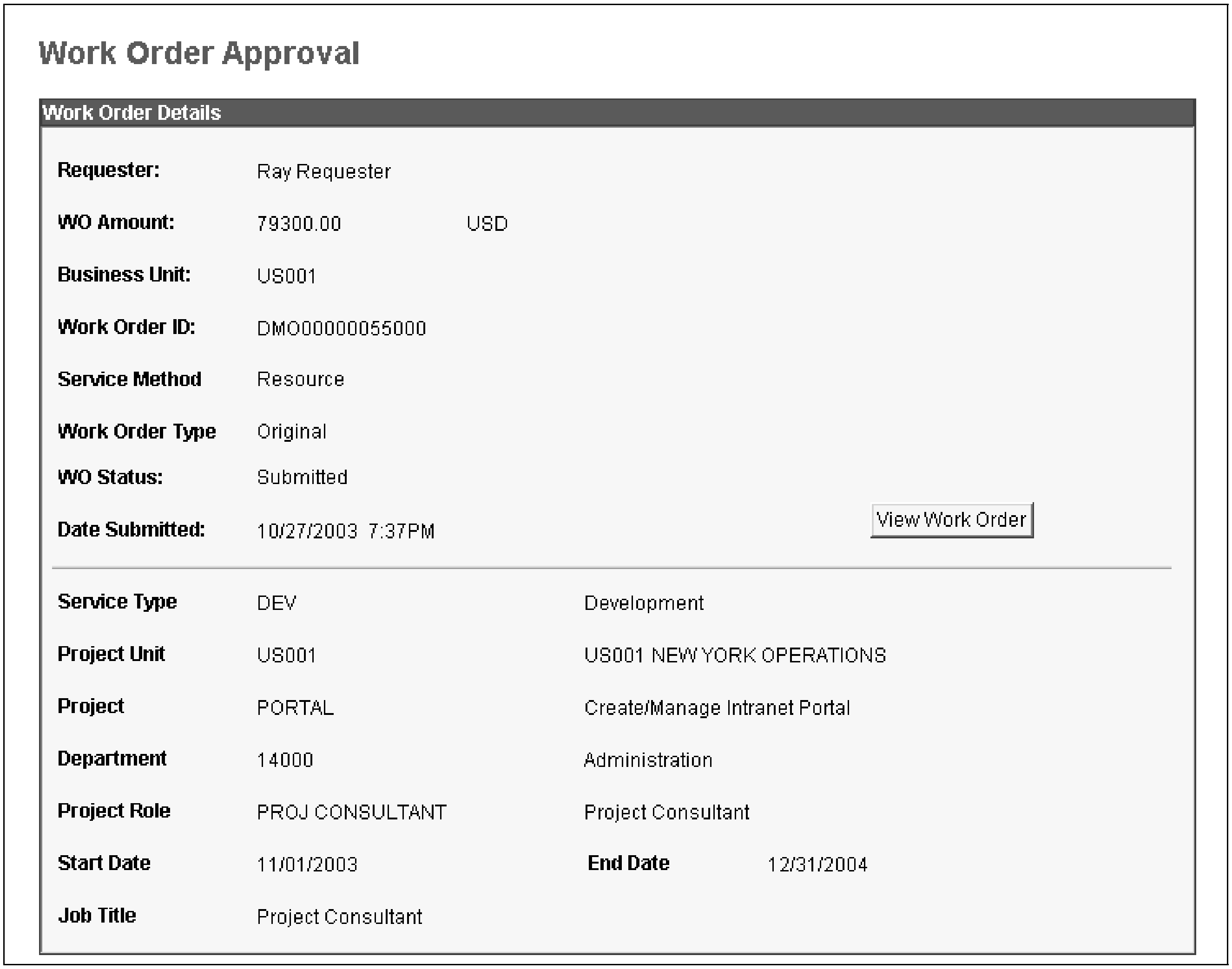
Page Name	Object Name	Navigation	Usage
Work Order Approval	SPF_WO_APPR_PG	Home, Worklist. Select the link to the work order ID that needs approval.	Approve or deny a work order during the workflow approval process.
Work Order Details	SPF_WO_REQ_VEN_DT	Click the View Work Order button on the Work Order approval page.	View additional information about the work order that you are asked to approve.

Using the Work Order Approval Process

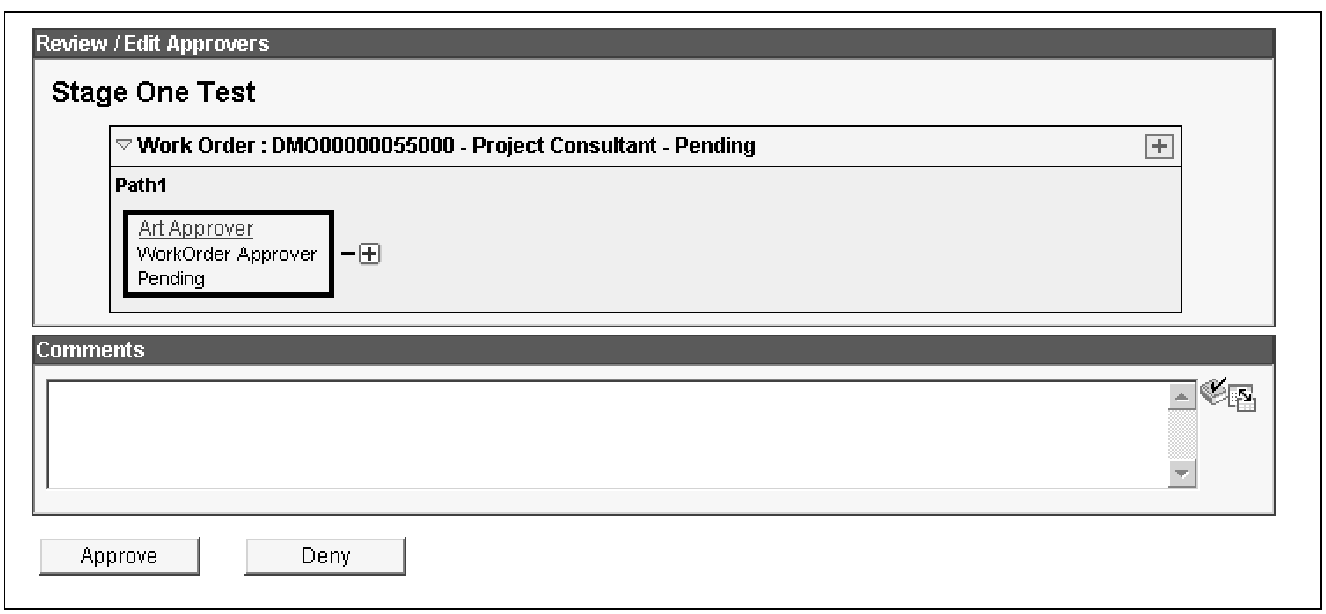
Use the Work Order Approval page to approve or deny a work order during the workflow approval process. You can also add approvers and reviewers to the workflow routing.

Note. The user must have a workflow role designed for work order approval.

Access the Work Order Approval page.



Work Order Approval page (page 1 of 2)



Work Order Approval page (page 2 of 2)

View Work Order Click to view detailed summary of the work order.

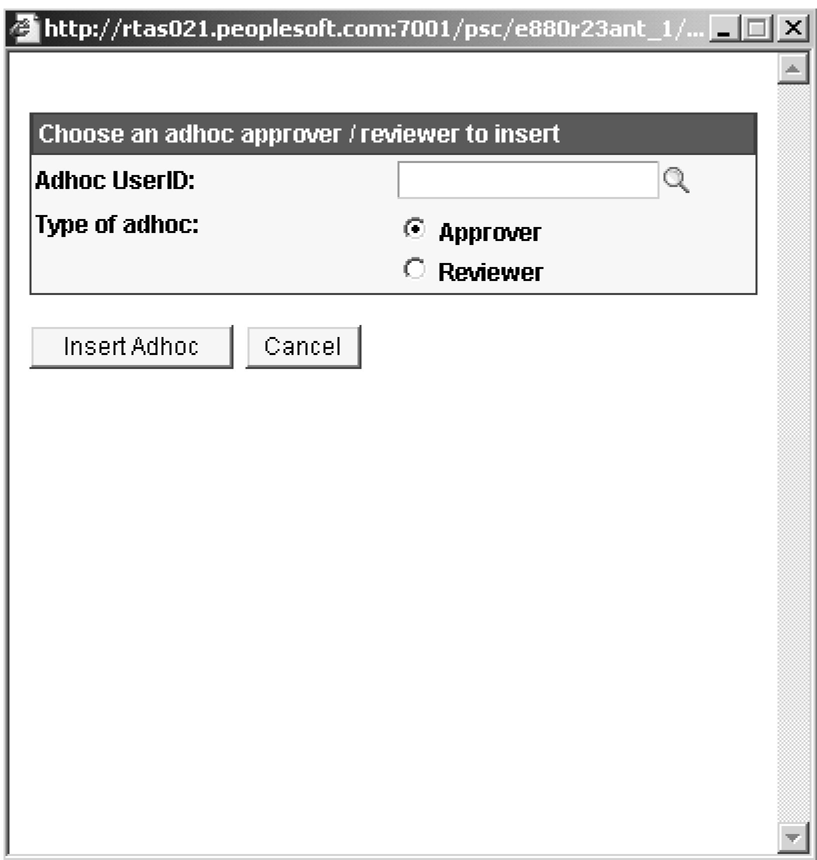
Deny Click to deny the work order. A worklist entry is sent to the original requester with any comments the approver enters.

Comment Enter any comments explaining why you are approving or denying this work order.

Review/Edit Approvers

Click to enter another approver or reviewer for this work order. This approver is added after your approval. The system adds the work order to the new approver's Worklist and the approver must approve the work order before it can continue through the approval process. Any combination of approvers and reviewers can be added to this work order by adding rows using the Insert Approver button.

User ID Enter the ID for the user that you add as an approver or reviewer of this work order.



Select an ad hoc approver.

Note. Once a work order is fully approved, it is removed from the reviewer's To Do List whether or not it has actually been reviewed. The work order then appears on the worklist of the user responsible for the work order's logistical tasks.

Reassigning 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 their during a specific date range. The system administrator can also assign a user's tasks either during a specific date range or indefinitely to another user.

This section discusses how to:

- Reassign tasks to another user temporarily.
- Reassign specific tasks to another user.

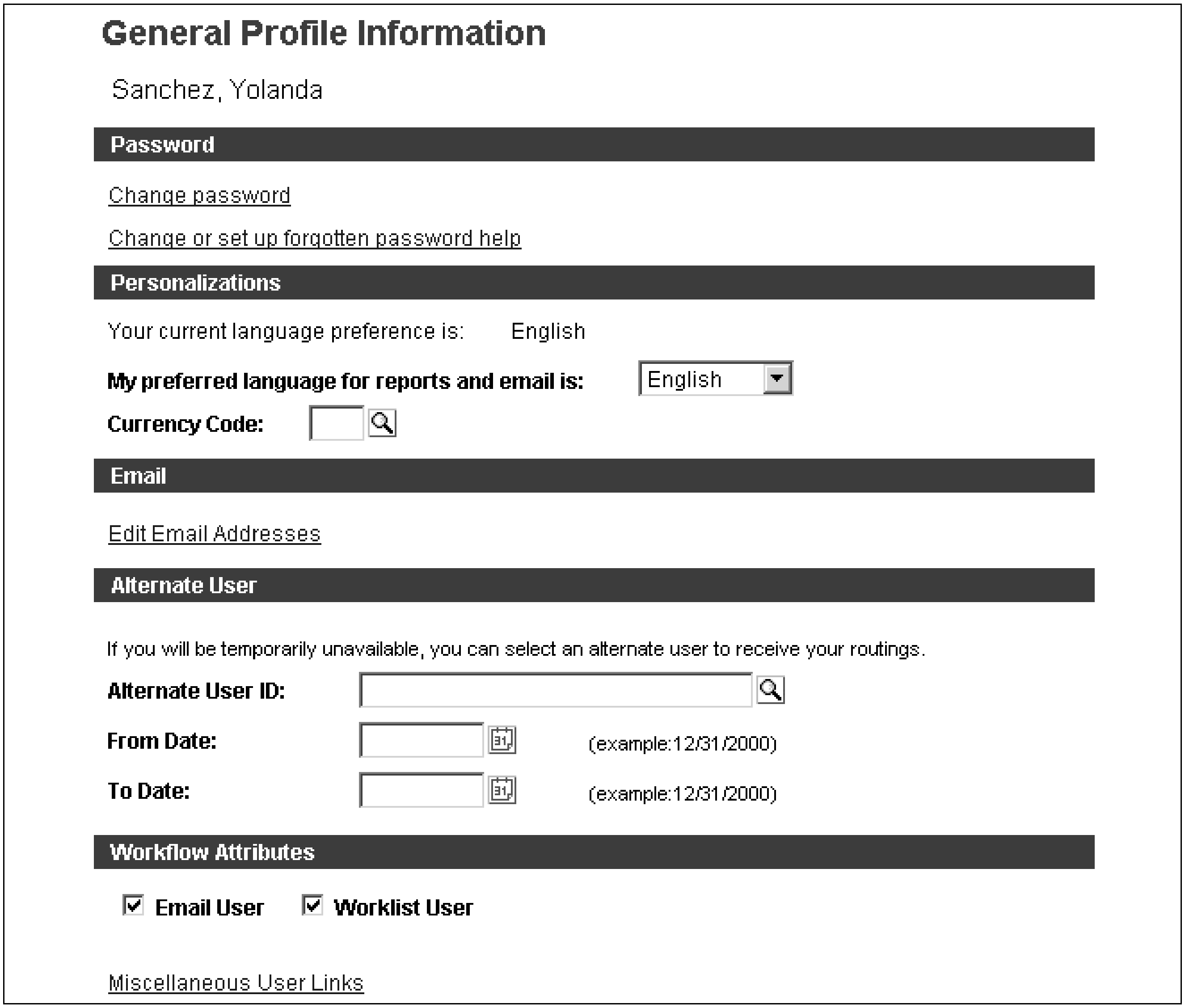
Note. The user who assigns the task and the user who is assigned the task must have the same user role. For example, if a requester wants to assign worklist entries, then the user to whom the worklist entries are assigned must also be a requester.

Pages Used to Reassign Tasks

Page Name	Object 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.



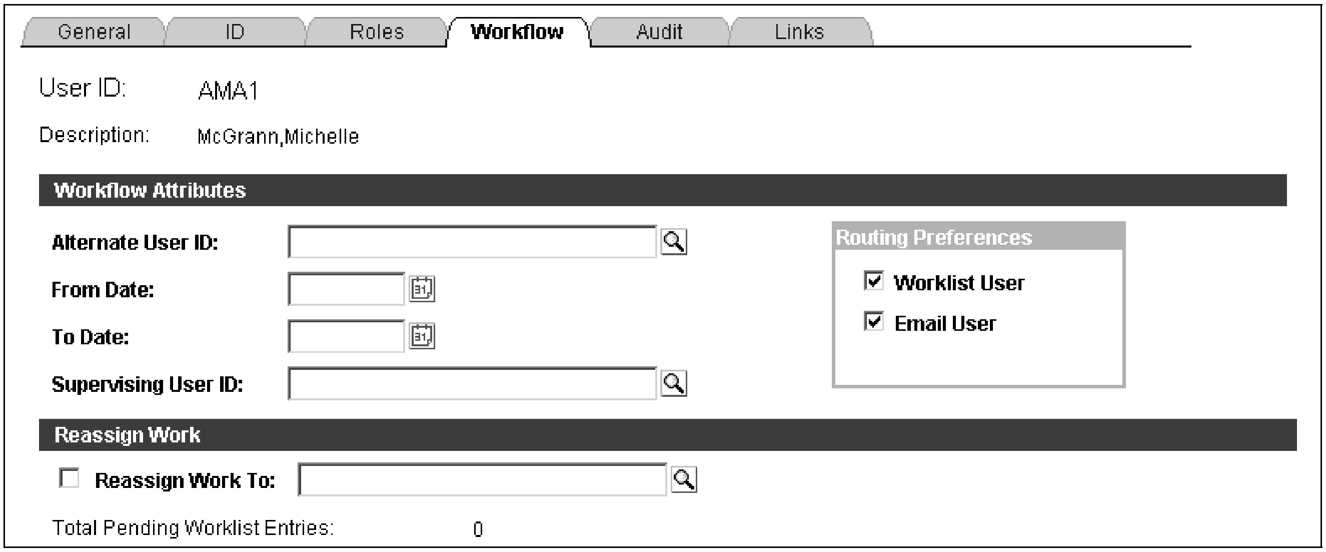
General Profile Information page

Select the Alternate User ID to whom you wish to temporarily reassign your tasks during a specified duration of time.

Alternate User ID Select the user ID for the alternate user.

Reassign Tasks Indefinitely

Access the User Profile Workflow page.



User Profile Workflow page

Use this page to indefinitely reassign tasks to another user.

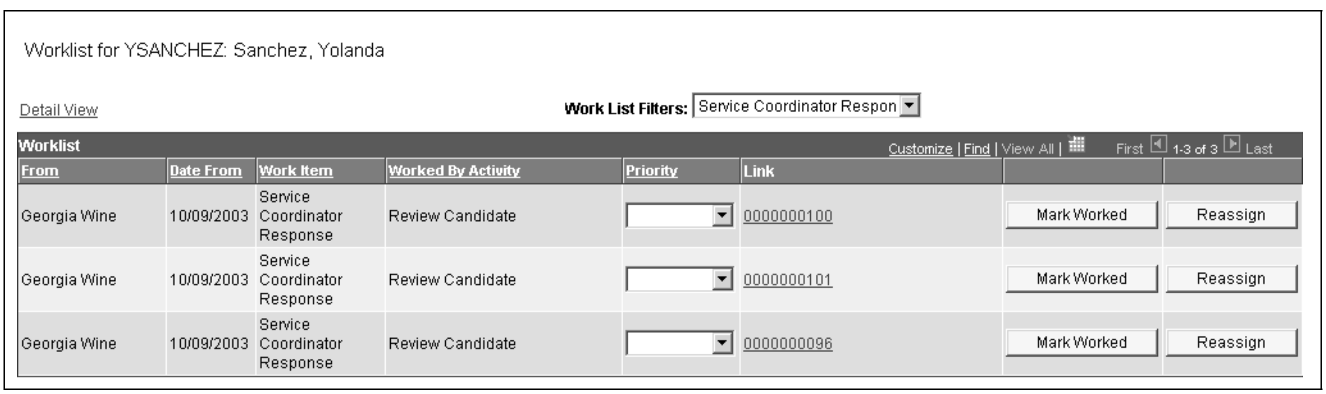
Alternate User ID Enter the Alternate User ID for the user to whom the work will be reassigned.

Supervising User ID Enter the Supervisor User ID for the user to whom the task will be reassigned.

Reassign Work To Select the check box and select the user to whom the all current and future tasks are indefinitely reassigned.

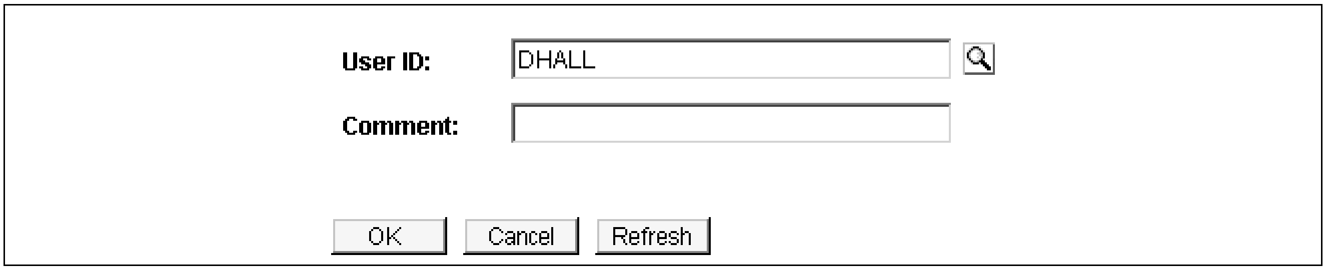
Reassign Specific Tasks

Access the Worklist page.



Worklist page

Click Reassign.



User ID page

User ID Select User ID.

CHAPTER 6

Using Service Contracts

This chapter provides an overview of service contracts and discusses creating service contracts.

Understanding Service Contracts

You must have PeopleSoft Purchasing installed to take advantage of services 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 includes 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 which have a rate associated with them.

When suppliers bid on a requisition, the system checks the role, unit of measure and vendor location to see if they match a current contract. The system defaults the contract rate if less than or equal to the requisition rate, to enforce the contract. If the contract price is less than the requisition rate, the system provides the contract price as a default and does not let the supplier go over that agreed rate. You are not required to award to the bidder with a contract, they are treated like just another bidder. When the requisition is filled, the system uses the contract rate in the filled rate field. The system takes the currency from the contract header, and the merchandise amount is the rate per hour.

The work order then gets generated for the contract rate. If PeopleSoft Purchasing is installed and you are integrating work orders with POs, then when the work order is released, the system overrides the work order rate with the purchase order rate. If a new contract becomes active between the time the supplier bid on the requisition and when the purchase order was created, the purchase order uses the most current contract price.

For example, you could have a contract with a supplier to provide construction services at the rate of $45 an hour. You source a requisition for a contracting job, and the supplier bids $48 an hour for the job. The system overrides the entered bid rate with the contract rate, and requires the supplier to bid at or below the contract rate.

Creating Service Contracts

This section discusses how to create service contracts.

Pages Used to Create Service Contracts

Page Name	Object Name	Navigation	Usage
Contract	CNTRCT_HDR	• Services Procurement, Requisition Fulfillment, Maintain Contracts • Purchasing, Procurement Contracts, Add/Update Contracts	Use to create service contracts.
Maintain Details - Details for Line	CNTRCT_PRC_UOM_SEC	Click the Line Details button on the Contracts page.	Enter rates for service contracts.

Creating Service Contracts

To create a service contract:

Note. You must enable service contracts on the Installation Options - Services Procurement page to add service contracts.

See *PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Defining PeopleSoft Services Procurement Installation Options.

1. Access the Contracts page.
2. Create a new contract using the *General Contract*, *Purchase Order*, or *Release to Single PO Only* Contract Type and enter an Item Type of *Role*.
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 Setting Up Procurement Options 8.8 PeopleBook, "Using Voucher and Order Contracts"

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 provides the contract rate as a default if less than or equal to the requisition rate.

Using Service Contracts with Purchase Orders

To check for contract rates with purchase orders:

1. Create a work order. Once the work order is approved, create a PO.
2. If the supplier, role, currency, and location match the contract, the system provides uses the contract rate if it is less than the work order rate.

CHAPTER 7

Managing Projects

This chapter provides an overview of projects and discusses how to:

- Create projects.
- Manage projects.

Understanding Projects

PeopleSoft Services Procurement facilitates managing projects by enabling service providers to log time and progress 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 Manage Services Activities page to define activities by project.

See Also

Chapter 3, "Implementing Your PeopleSoft Services Procurement System," page 21

Prerequisites

You must set up the following attributes before entering project information:

- Project business units and business unit options.
- Project types.

See Also

"Preface," Common Elements Used In This PeopleBook, page xxiv

Chapter 3, "Implementing Your PeopleSoft Services Procurement System," Setting Up Business Units, page 25

Chapter 3, "Implementing Your PeopleSoft Services Procurement System," Setting Up Project Definitions, page 53

Creating Projects

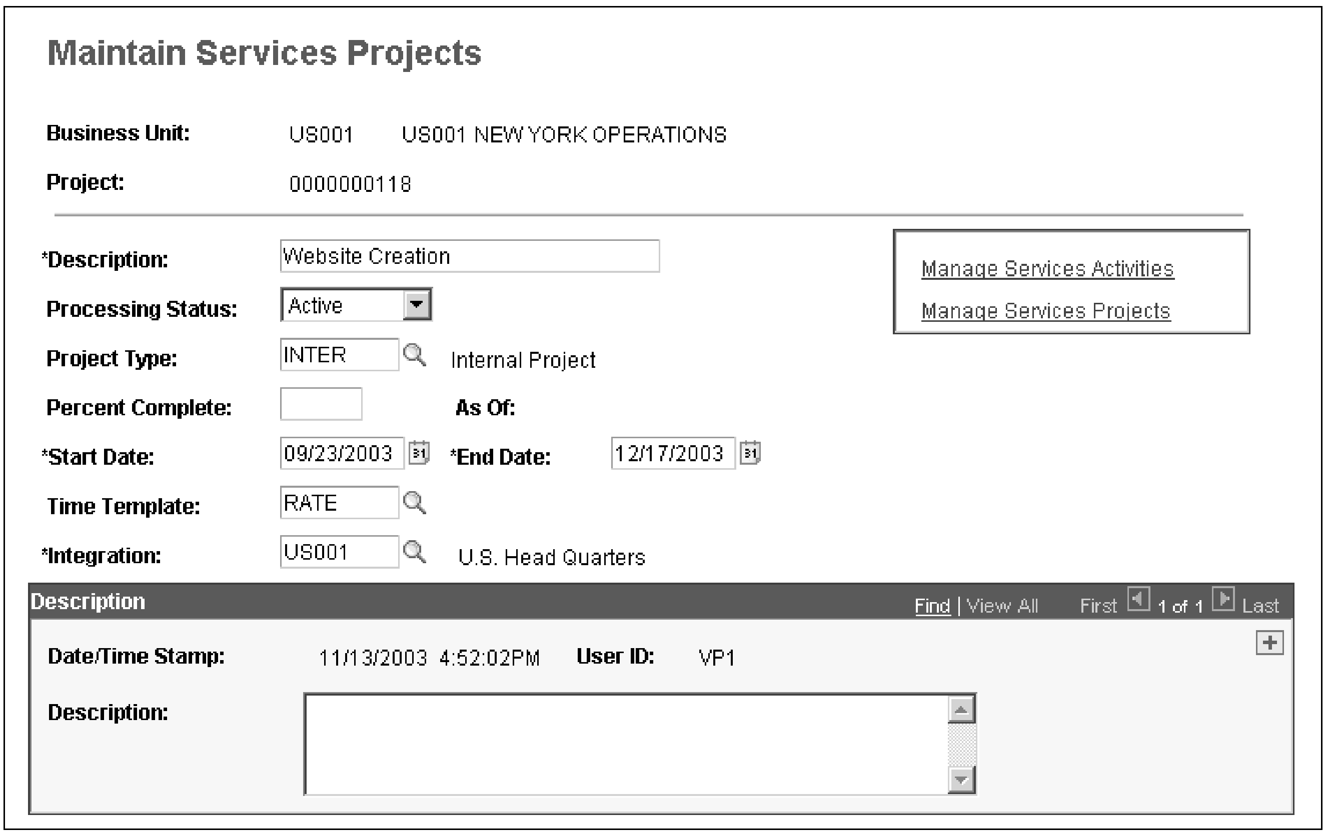
This section discusses how to enter general project information.

Pages Used to Create a Project

Page Name	Object Name	Navigation	Usage
Manage Services Projects	SPA_MANAGE_PROJ	Services Procurement, Manage Projects and Activities, Manage 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 Services Project link on the Manage Services Projects page.	Enter general project information.

Entering General Project Information

Access the Maintain 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.

See *PeopleSoft Project Costing 8.8 PeopleBook*, “Creating and Maintaining Projects”.

Project Type Select a project type to group similar projects together.

Start and End Dates Enter the project start and end dates. These are provided as a default on the service requisition and work order.

Time Template Select the default format to appear on the work order. The time templates in the drop-down list box are specific to the project business unit.

Note. The SP_ENFORCE_PROJ_ATTR role action enforces the project default time template on the requisition and work order. When creating a service requisition or work order, users who have one of the roles associated to this role action must adhere to the overtime and expense settings on the project's default time template. For example if the template does not allow overtime or expenses, the user can't select the overtime check box or enter an expense rate or amount. If the user does not have one of the roles defined on the role action, they can override the project's default time template overtime flag and expense settings.

Integration This field appears if you have installed PeopleSoft Projects. Enter a business unit to define the Projects-General Ledger integration template that the system uses to send transactions from Projects to PeopleSoft General Ledger.

See Also

PeopleSoft Project Costing 8.8 PeopleBook, "Structuring PeopleSoft Project Costing"

Managing Projects

This section discusses how to:

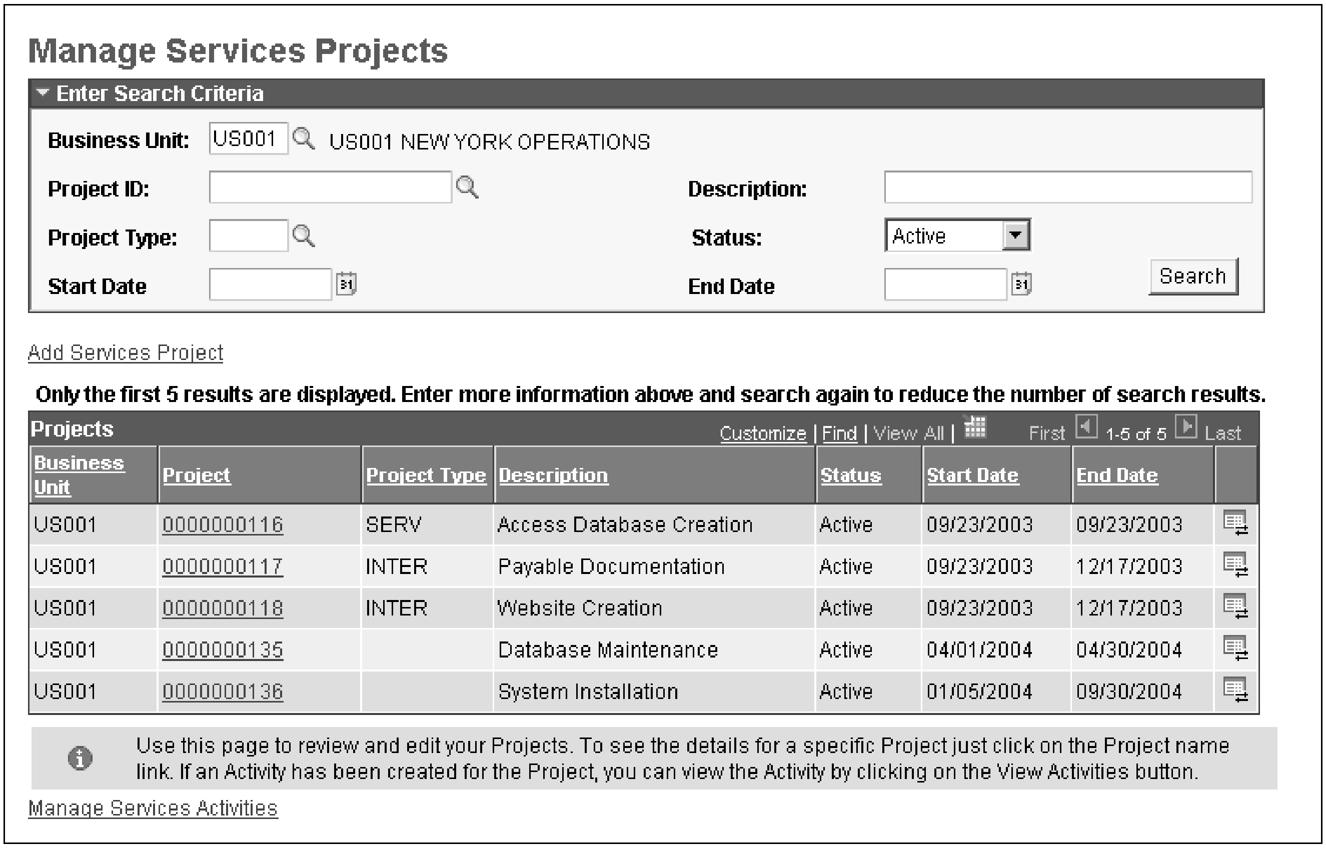
- View, search, and sort projects.
- Modify general project details.
- Modify project status.

Pages Used to Manage Projects

Page Name	Object Name	Navigation	Usage
Manage Services Projects	SPA_MANAGE_PROJ	Services Procurement, Manage Projects and Activities, Manage 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 Services Project link from the Manage Services Projects page.	View or modify general project information.

Viewing, Searching, and Sorting Projects

Access the Manage Services Projects page.



Manage Services Projects page

Roster

Project Click a project name link to access the Project General page in display-only mode.

Click the Activities button to access the Manage Services Activities page and view a list of activities for the project.

Modifying General Project Details

Access the Maintain Services Projects page in Edit mode.

Modify the Description, Project Type, Processing Status, Project Type, Percent Complete, Start Date, End Date, and Time Template fields as required.

Note. You can't modify Business Unit or Project ID for an existing project. If the project is no longer valid, you can change the status to *Inactive.*

CHAPTER 8

Managing Activities

This chapter provides an overview of activities in PeopleSoft Services Procurement and discusses how to:

- Define activities by project.
- Manage activities.

Understanding Activities in PeopleSoft Services Procurement

Activities are specific tasks that you add to a project. Any project for which you incur costs directly must contain at least one activity.

You use activities to further define projects, and they are also tied to timesheets and progress logs. From a financial perspective, they are used to break down the various costs that are associated with a project.

See Also

“Preface,” Common Elements Used In This PeopleBook, page xxiv

Prerequisite

You must create a project in PeopleSoft Services Procurement before you can assign activities to it.

See Also

Chapter 7, “Managing Projects,” Creating Projects, page 105

Defining Activities by Project

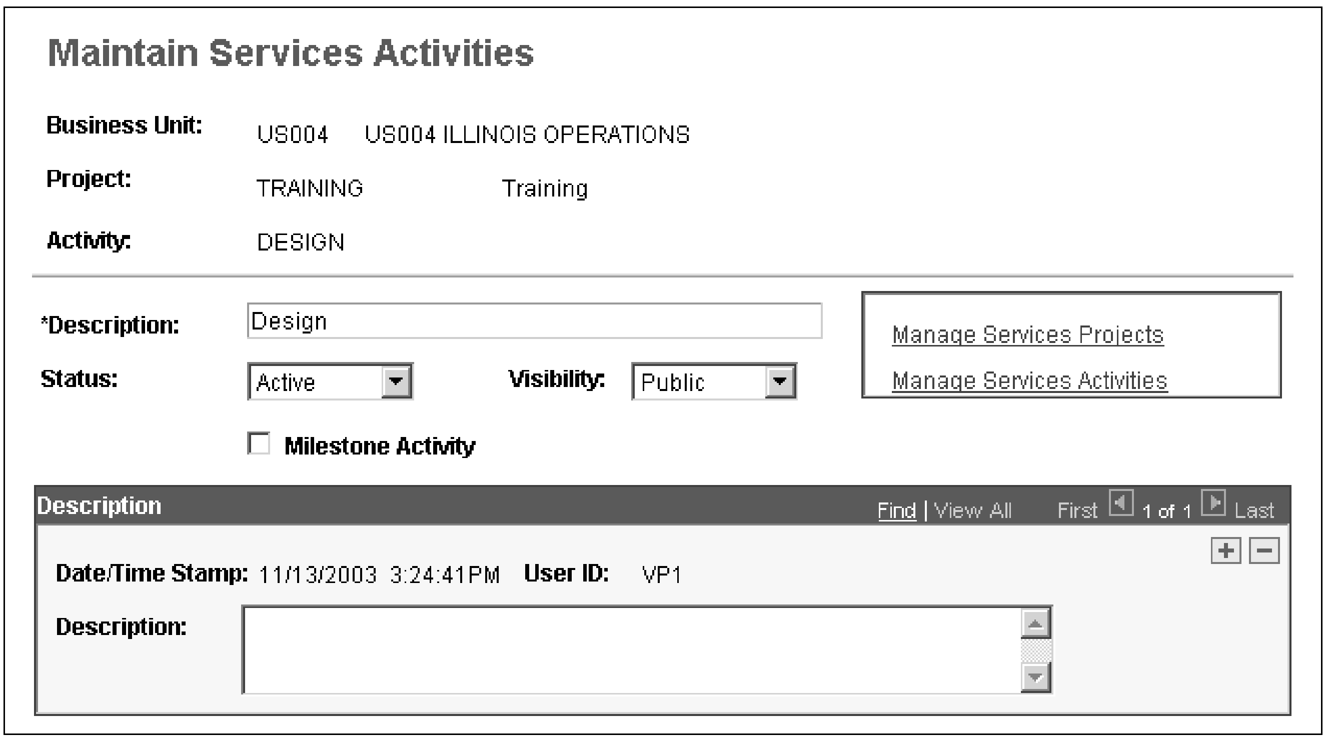
This section discusses how to enter activity information.

Pages Used to Define Activities

Page Name	Object Name	Navigation	Usage
Manage Services Activities	SPA_MANAGE_ACT	Services Procurement, Manage Projects and Activities, Services Activities	View, search, and sort the list of available activities. Access the activity that you want to modify.
Maintain Services Activities	SPA_PROJ_ACT	• Click the Add Services Activity link from the Manage Services Activities page. • Click a linked Activities from the Manage Services Activities page.	Enter activity information.

Entering Activity Information

Access the Maintain Services Activities page.



Maintain Service Activities page

Activity Description Enter the activity description

Status Enter the activity status of Active or Inactive

Milestone Activity Select to specify that the activity is based on milestone deliverables. If the check box is selected, progress logs can be logged against this milestone activity. If the check box is cleared, time and expenses are logged against the activity.

Managing Activities

This section discusses how to:

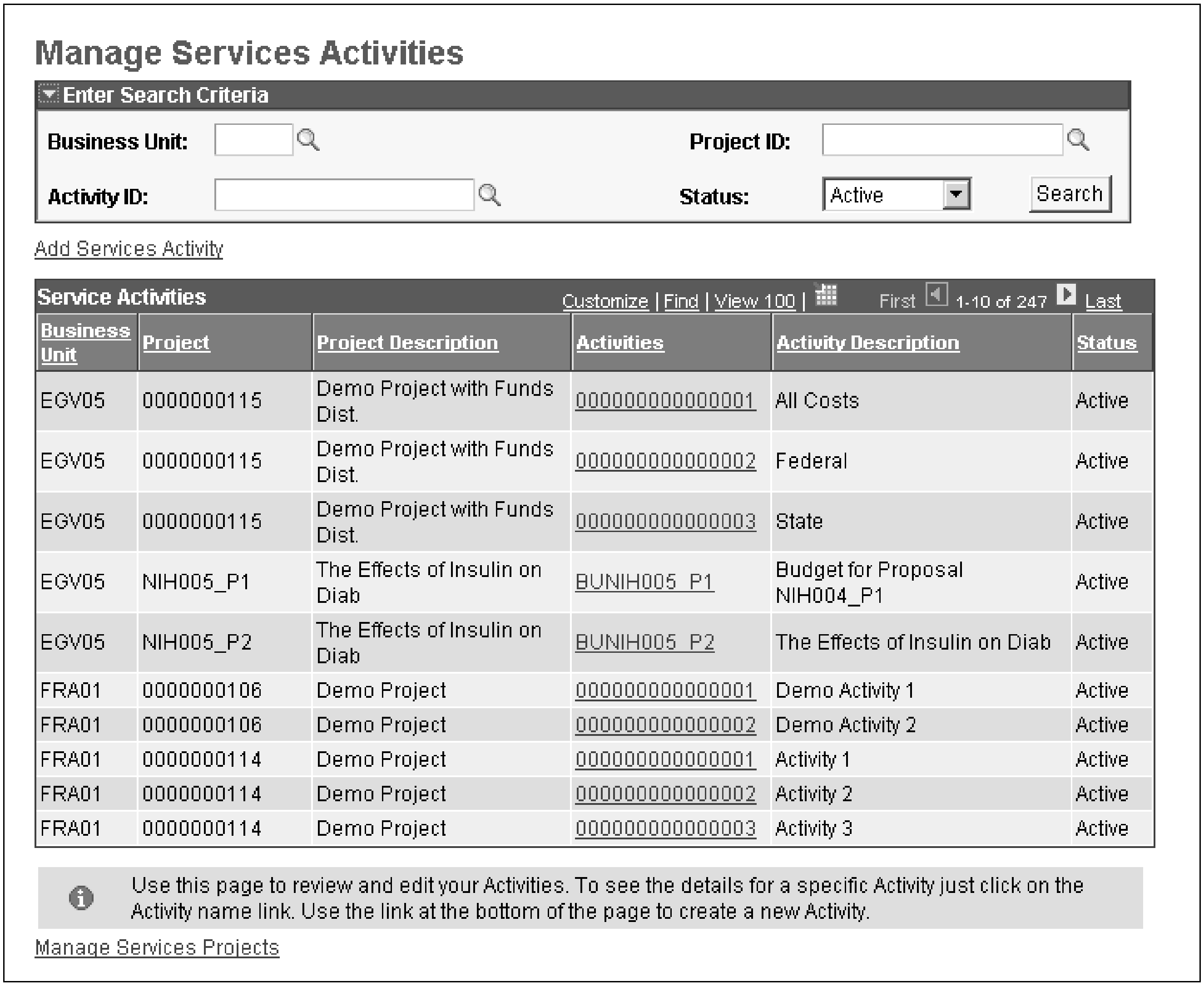
- View, search, and sort activities.
- Modify an activity.

Pages Used to Manage Activities

Page Name	Object Name	Navigation	Usage
Manage Services Activities	SPA_MANAGE_ACT	Services Procurement, Manage Services Activities	View, search, and sort the list of available activities. Access the activity that you want to modify.
Maintain Services Activities	SPA_PROJ_ACT	• Click the Add Services Activity link from the Manage Services Activities page. • Click the Activities link from the Manage Services Activities page.	View or modify activity information.

Viewing, Searching, and Sorting Activities

Access the Manage Services Activities page.


Manage Services Activities

Enter Search Criteria

Business Unit: Project ID:

Activity ID: Status: Active Search

Add Services Activity

Service Activities Customize | Find | View 100 | First 1-10 of 247 Last

Business Unit	Project	Project Description	Activities	Activity Description	Status
EGV05	0000000115	Demo Project with Funds Dist.	000000000000001	All Costs	Active
EGV05	0000000115	Demo Project with Funds Dist.	000000000000002	Federal	Active
EGV05	0000000115	Demo Project with Funds Dist.	000000000000003	State	Active
EGV05	NIH005_P1	The Effects of Insulin on Diab	BUNIH005_P1	Budget for Proposal NIH004_P1	Active
EGV05	NIH005_P2	The Effects of Insulin on Diab	BUNIH005_P2	The Effects of Insulin on Diab	Active
FRA01	0000000106	Demo Project	000000000000001	Demo Activity 1	Active
FRA01	0000000106	Demo Project	000000000000002	Demo Activity 2	Active
FRA01	0000000114	Demo Project	000000000000001	Activity 1	Active
FRA01	0000000114	Demo Project	000000000000002	Activity 2	Active
FRA01	0000000114	Demo Project	000000000000003	Activity 3	Active

Use this page to review and edit your Activities. To see the details for a specific Activity just click on the Activity name link. Use the link at the bottom of the page to create a new Activity.

Manage Services Projects

Manage Services Activities page

Search and Sort Activities

Enter search criteria and click Go. The search results appear in the activity roster at the bottom of the page.

Roster

Activities Click the activity name link to access the Add Services Activity page in View mode.

Modifying an Activity

Access the Add Services Activity page in edit mode.

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 9

Creating and Managing Requisitions

This chapter provides an overview of requisitions and discusses how to:

- Create resource requisitions.
- Create deliverables based requisitions.
- Manage service requisitions.

Understanding Requisitions

This section lists prerequisites and common elements and discusses requisitions.

Prerequisites

Before you enter requisitions into the system, you must:

- Be authorized to process requisitions on the User Preferences page.
- Have identified your user ID as a requester on the Requester Setup page, where you add defaults for requisitions.

See Also

PeopleSoft Setting Up Procurement Options 8.8 PeopleBook, "Defining Procurement Options," Defining Requesters

Requisitions

Requesters can use PeopleSoft Services Procurement to create and maintain service requisitions. After you enter and submit a requisition, you send it to the approver for approval. Approved requisitions are then matched 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.

Resource Requisitions

Resource requisitions enable you to request the services of an individual service provider. Upon awarding the requisition event to the supplier, the requester generates a services work order and memorializes these attributes as terms and conditions. Upon the work order release, the service provider creates timesheets, and you pay them an hourly rate for each hour worked.

You can track the resource requisition all the way through invoicing.

Deliverables Based Requisitions

Deliverables based requisitions 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 deliverable-based requisitions, so a statement of work defines the requirements.

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 event to the supplier, the requester generates a services work order and memorializes these attributes as terms and conditions. Upon the work order release, the service provider records time against a progress log, and you pay your service provider based on milestones, percentages, a fixed amount, or rates.

For example, if it you have a percentage based requisition, the service provider reports the percentage complete against a progress log and you pay the supplier when that percentage of work is done. Or, you could list project milestones and pay the service provider an agreed upon amount when each milestone is completed.

You can track the deliverables based requisition all the way through invoicing.

Supplier Rate Breakdown and Resource Requisitions

When you fill a service requisition, the requester enters a bill rate, which is the rate paid to the supplier. When suppliers bid on this requisition, they can enter up to four types of pay rates: the service provider pay rate, any additional incurred costs, and standard and third-party markup rates, if applicable. The sum of the rates is the bid rate. This enables service coordinators to track the rate breakdown and set limits on the supplier markup rates.

After you fill a service requisition with an agreed upon bill rate, the system generates a work order that shows the rate breakdown. You can not edit the rates if the work order is linked to a requisition.

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 which pay types are applicable. 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. 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 to determine the pay rate for the supplier.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Defining User Preferences,” Defining Overall User Preferences

“Preface,” page xxiii

Chapter 18, “Supplier Scoring for PeopleSoft Services Procurement,” page 295

Multicurrency with 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 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 negotiations between service providers and service coordinators to occur in currencies other than the requisition currency.
- Enable users to create expense sheets in a currency different from the work order currency.
- Create invoices in the vendor location currency, even if different from the requisition or work order currency.

If multicurrency requisitions are enabled, the system displays the requester's currency 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 system displays the purchasing business unit currency and the user is not allowed to change it.

The system calculates the transaction currency in the requisition line from the base currency that you define for the selected business unit. The currency conversion exchange rate is based on the rate type that you define for the selected business unit. The system stores the rate type and rate date for currency conversion. The rate type that is defined in the Purchasing business unit definition is the default rate type. The effective rate date is the date when the requisition is submitted for approval.

Creating Service Resource Requisitions

This section provides an overview of the requisition process and discusses how to:

- Enter service requisition information.
- Enter scoring criteria.
- Enter supplier information.
- Enter sourcing details.
- Suggest a vendor.

Creating a Services Resource Requisition

To complete the service requisition process:

1. Access the Create Requisitions page, add a requisition name.
2. Access the Create Requisitions - Services page.

   The service type, service, project business unit, project, time approver and service coordinator default from the service requester defaults. The location defaults from the requester setup ship-to location.
3. Select a Service Type with a Service Method of *Resource.*
4. Enter the service. The system defaults the job title, scope of work , competencies, education level, experience, telecommute and travel required fields based on attributes associated with the service.

5. Enter a project business unit and project. These are required fields. The start and end date default from the project. If the project start date is in the past, the current date defaults to the start date.
6. Because this is a resource based requisition, you must enter a rate and unit of measure for the service.
7. If expenses are allowed for the requisition, enter the expense rate and unit of measure or just the expense amount.
8. Click the Scoring Criteria link on the Create Requisitions - 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.
9. Service Coordinator and time approver default from Requester defaults.
10. Click the Go to Submit Requisition button at the bottom of the page to navigate to the requisition checkout page.

    Use this page to update the requisition name or to add comments.
11. Click the Shipping Info link on the Requisition Checkout page.

    Use this page to enter distribution information for the requisition.
12. Click the Save and Preview Workflow button to save the requisition and preview the approval routings.
13. Click the Save and Submit button to save the requisition and submit it for approval.

See Also

“Preface,” page xxiii

Chapter 3, “Implementing Your PeopleSoft Services Procurement System,” page 21

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Items,” Defining General Item Information

PeopleSoft Managing Items 8.8 PeopleBook, “Working With Items,” Using Units of Measure

PeopleSoft Purchasing 8.8 PeopleBook, “Defining Purchasing Item Information,” Defining Purchasing Item Attributes

PeopleSoft Purchasing 8.8 PeopleBook, “Defining PeopleSoft Purchasing Business Units and Processing Options,” Establishing Purchasing Options

Pages Used to Create Service Resource Requisitions

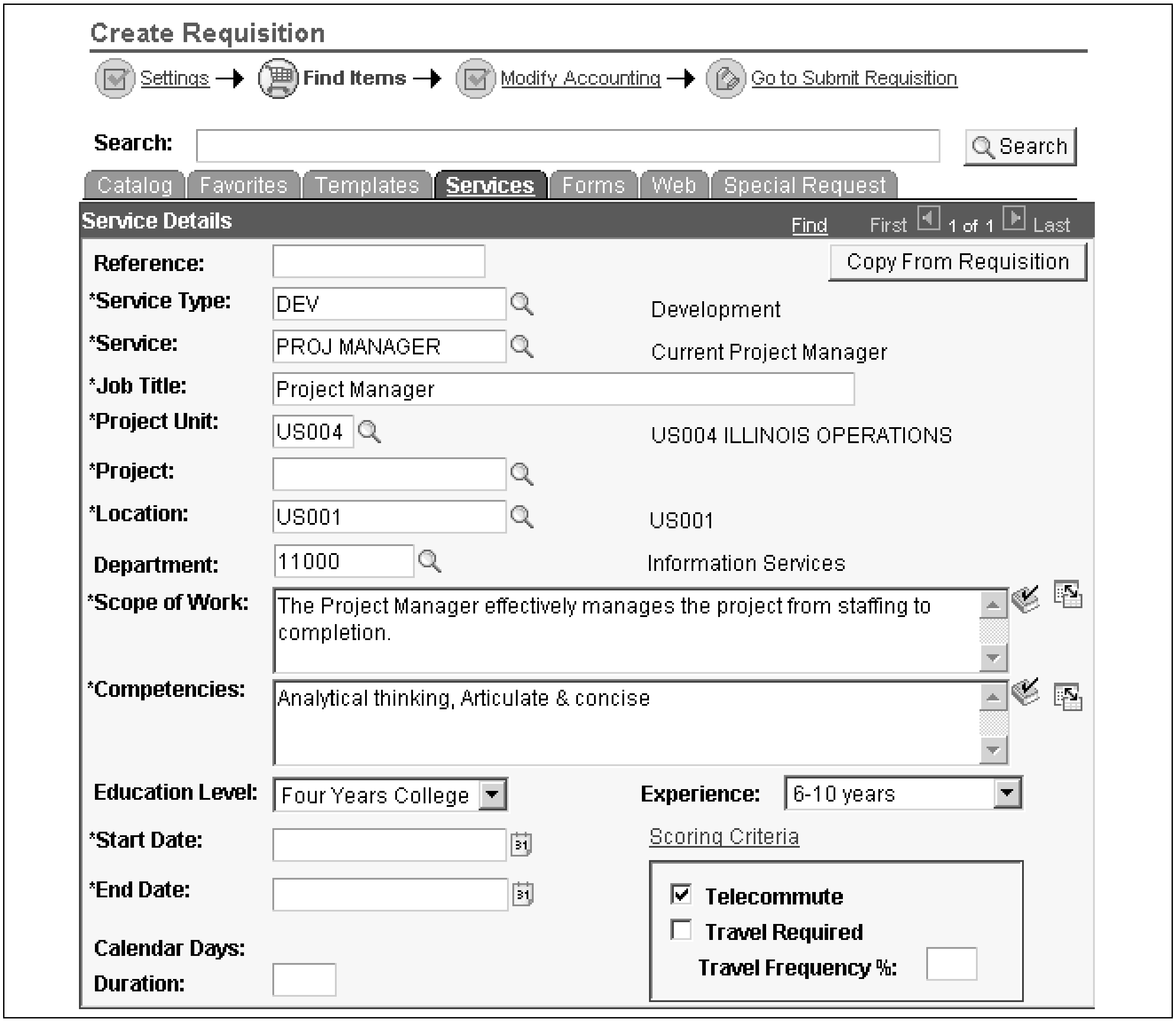
Page Name	Object Name	Navigation	Usage
Services	SPF_REQ_INFO_PG	Services Procurement, Create Requisition Click the Services tab.	Enter basic service requisition information.
Bid Factors by Requisition Line	SPF_BDFTR_REQ_PG	Click the Scoring Criteria link on the Services page.	Adjust the weightings of each bid factor to determine its level of importance.
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.
Currency Information	EXCH_RT_DTL_INQ	Click 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 isn't in the system yet.
Requisition Checkout	PV_REQ_FORM	Click the Go to Requisition Checkout button on the Services page.	Save the requisition and submit for approval.
Shipping and Accounting	PV_REQ_DISTRIB_DET	Click the Split Shipping and Accounting button on the Requisition Checkout page.	Update shipping and accounting information.
Line Comments	PV_REQ_COMMENTS	Click the Comments button on the Requisition Checkout page.	Enter line comments.

See Also

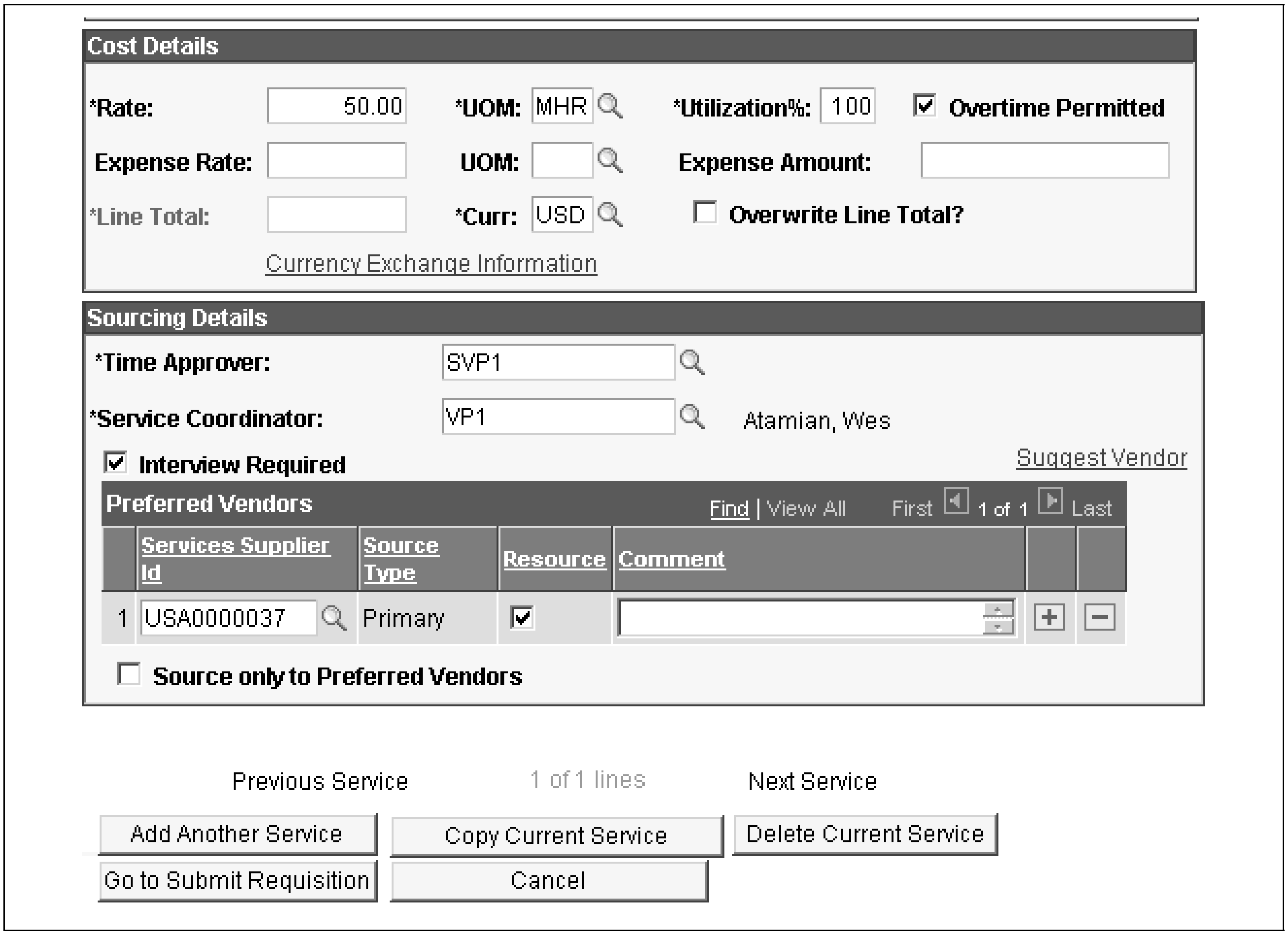
PeopleSoft eProcurement 8.8 PeopleBook, "Creating Requisitions in PeopleSoft eProcurement"

Entering Requisition Information

Access the Create Requisition - Service page.



Create Requisition - Service (page 1 of 2)



Create Requisition - Service (page 2 of 2)

Note. If you defined the project role attributes, the system populates many of the fields in the Service Details section of the Create Service Request page automatically. If you defined a rate sheet for the role region currency combination, the system automatically populates the rate with the default rate that you define on the rate sheet.

If you define defaults on the Requester User Defaults page, many of the fields on the requisition appear by default from that page.

Service Details

Service Type

Select the project service type for this requisition; for example, information technology, professional, or hardware engineering. Initially defaults from the service requester defaults, if they are defined.

Service

Select the specific service/role that is to be performed; for example, Java Developer. You can only select services linked to the service type specified above. Initially defaults from the service requester defaults, if they are defined.

Job Title

Enter the internal classification of the position. Defaults from the service/project role description.

Project Unit Enter the PeopleSoft Project Costing business unit that is associated with the requisition line. Initially defaults from the service requester defaults, if they are defined.

Project Identify the project that is associated with the service requisition. Use the project search to locate an existing project. The project must have a status of active. Initially defaults from the service requester defaults, if they are defined.

Location Select the location where the job is performed. Initially defaults from the Requester Defaults.

Scope of Work Enter the scope of the project in this free-form field. Defaults from the comments field on the service/project role attributes.

Competencies Enter a brief description of the skills that a candidate must possess to fill the position. Defaults from the competencies defined on the service/project role attributes.

Education Enter the minimum education level that a candidate must possess to fill the position. Defaults from the competencies defined on the service/project role attributes.

Experience Enter the number of years of experience that a candidate must possess to fill the position. Defaults from the competencies defined on the service/project role attributes.

Start Date and **End Date** Enter the dates on which the job begins and ends.

Note. The start and end date appear by default from the project, if it's defined. If the project start date is in the past, the start date defaults to the current date.

Calendar Day Displays the number of days between the start and end date.

Duration Enter the number of working days between the job start date and end date. The system defaults a value after enter the start and end dates, but it can be overridden. The system uses this for calculating the quantity and units of measure. It adds a unit of measure for that number of days to the requisition. This is a default value that is defined in the installation parameters.

Telecommute Select if the job allows candidates to work from home.

Travel Required Select if the job requires a candidate to travel.

Travel Frequency Enter the percentage of time that travel is required.

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 factors 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.

Cost 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 project role and region. The tolerance amount for the rate sheet is checked 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, you receive either an error or a warning message.

UOM (unit of measure)

Select the unit of measure that you define for the business unit, or select a unit of measure from the list of available values.

Currency

Select 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 on 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.

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 UOM.

Note. The expense fields may not be available if the requestor has the role action *SP_ENFORCE_PROJ_ATTR* and the default time template on the project determines that expenses are not allowed.

UOM (unit of measure)

Select the unit of measure that you define for the business unit, or select a unit of measure from the list of available values.

Expense Amount (unit of measure)

Enter the total expense amount for the requisition. The system calculates the value using the expense rate and UOM, but you can override the value.

Line Total (unit of measure)

Displays the total for rate and expense for the duration of the requisition.

Overwrite Line Total (unit of measure)

Select the *Overwrite Line Total* check box to increase the line total calculated by the system. The line total can not be less than the system calculated total.

Utilization % Enter the percentage of time that the candidate spends in a workday. For example, if the candidate typically works a half-day, the utilization is 50 percent.

Overtime Permitted Select if overtime is permitted for this requisition. The system calculates overtime if the unit of measure is defined as hourly. The default value comes from the project's default time template, if it exists.

If you select this check box, the system validates that the unit of measure equals the hourly unit of measure that is defined on the Service Procurement Installation Options page. If the unit of measure definitions are not the same, the system displays an error message indicating that overtime is permitted for hourly rates only.

Note. The Overtime Permitted check box may not be available if the requestor has the role action *SP_ENFORCE_PROJ_ATTR* and the default time template on the project determines that overtime is not allowed.

Sourcing Details

Time Approver Select the name of the person who approves timesheets that are related to this requisition line. Initially defaults from the service requester defaults, if they exist.

Note. The time approver must have one of the roles defined in the *SP_TIME_APPROVER* role action.

Service Coordinator Select the name of the person who is responsible for filling the requisition line. Initially defaults from the service requester defaults, if they exist.

Note. The service coordinator must have one of the roles defined in the *SP_SRVC_COORDINATOR* role action.

Interview Required Select if a candidate interview is required. Defaults from the service/project role attributes.

Suggest Vendor Click to access the Suggest Vendor page, where you can suggest a vendor who does not yet exist in the system.

Preferred Vendors

The preferred vendors grid is hidden for users having a role defined for the *SP_HIDE_SOURCING_PG* role action.

Services Supplier ID Enter the name of the service supplier to whom you want to source the requisition. This is an instruction page for the service coordinator.

Source Type Displays the source type from the following values: *Primary, Secondary,* and *Tertiary.*

Resource Select to indicate if the supplier is also a payroll resource.

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 flag is only available if the requester is authorized to source to preferred vendors on the Service Requester Defaults.

Buttons

Add Another Service — Click to add another service requisition line.

Copy Current Service — Click to copy the current service requisition line.

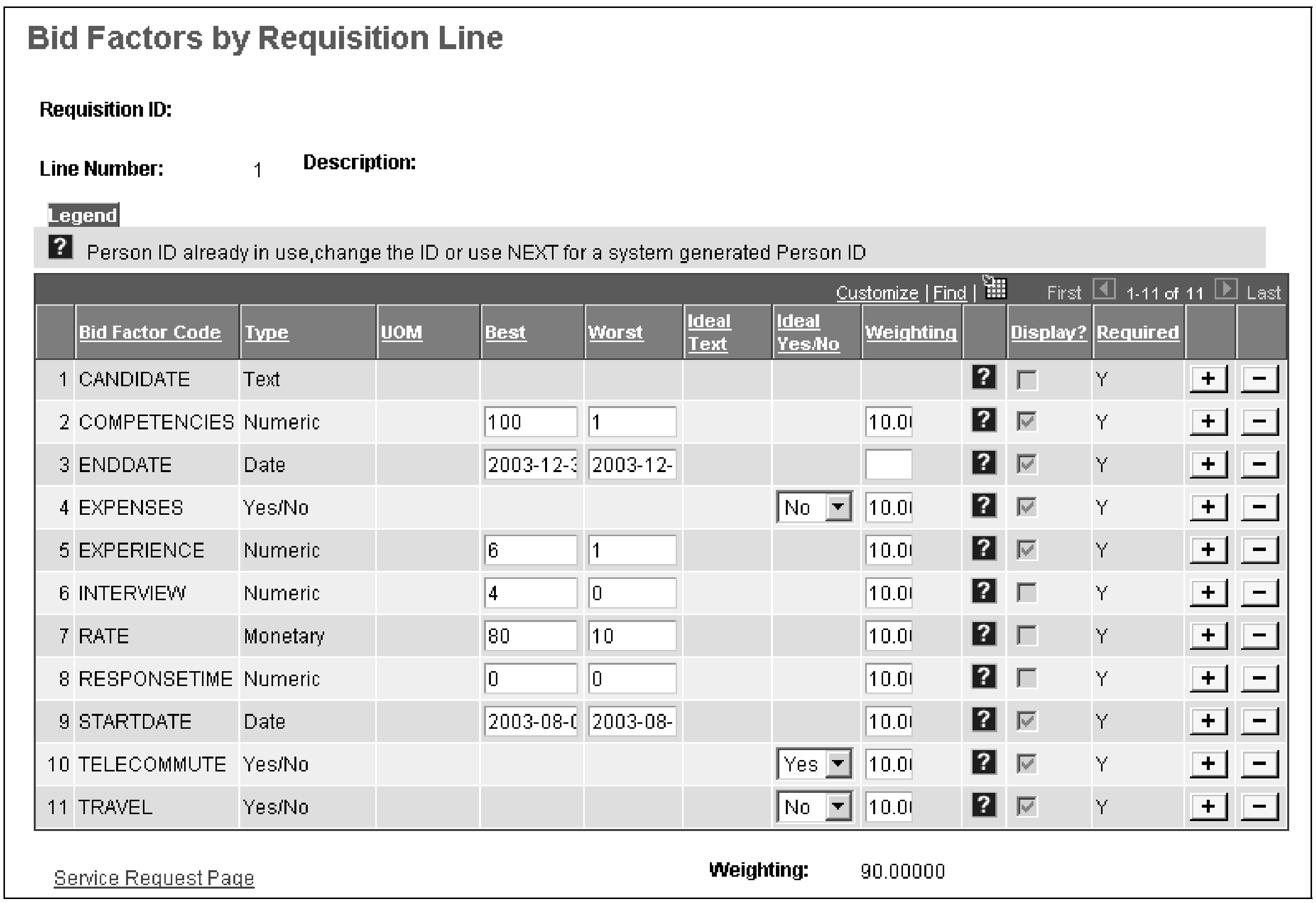
Delete Current Service — Click to delete current service requisition line.

Go to Submit Requisition — Click to navigate to the requisition checkout page where you can submit the requisition for approval.

Entering Scoring Criteria

Access the Bid Factor by Requisition Line page.

On a resource based requisitions, the system defaults every bid factor with a Resource Service type bid factor selected from the Bid Factor Mapping page.


Bid Factors by Requisition Line

Requisition ID:

Line Number: 1 **Description:**

Legend

? Person ID already in use,change the ID or use NEXT for a system generated Person ID

Customize | Find | First 1-11 of 11 Last

	Bid Factor Code	Type	UOM	Best	Worst	Ideal Text	Ideal Yes/No	Weighting		Display?	Required		
1	CANDIDATE	Text							?		Y	+	−
2	COMPETENCIES	Numeric		100	1			10.0	?		Y	+	−
3	ENDDATE	Date		2003-12-3	2003-12-				?		Y	+	−
4	EXPENSES	Yes/No					No	10.0	?		Y	+	−
5	EXPERIENCE	Numeric		6	1			10.0	?		Y	+	−
6	INTERVIEW	Numeric		4	0			10.0	?		Y	+	−
7	RATE	Monetary		80	10			10.0	?		Y	+	−
8	RESPONSETIME	Numeric		0	0			10.0	?		Y	+	−
9	STARTDATE	Date		2003-08-0	2003-08-			10.0	?		Y	+	−
10	TELECOMMUTE	Yes/No					Yes	10.0	?		Y	+	−
11	TRAVEL	Yes/No					No	10.0	?		Y	+	−

Service Request Page **Weighting:** 90.00000

Bid Factors by Requisition Line page

Bid Factor Codes
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 your 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 answer for a particular question.

Ideal Yes/No
Enter the ideal response (yes or no) that a candidate can give for a particular question.

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, you might choose to weigh that bid factor more heavily than others.

Note. The total of all bid factor weightings must equal one.


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, the bid factor question that is associated with that code might be, “How many relevant years of experience does the candidate have?”

Display
Select to display the question to the supplier contact. If you do not select this check box, the question is not visible.

Suggesting Vendors

Access the Suggest a Vendor page.

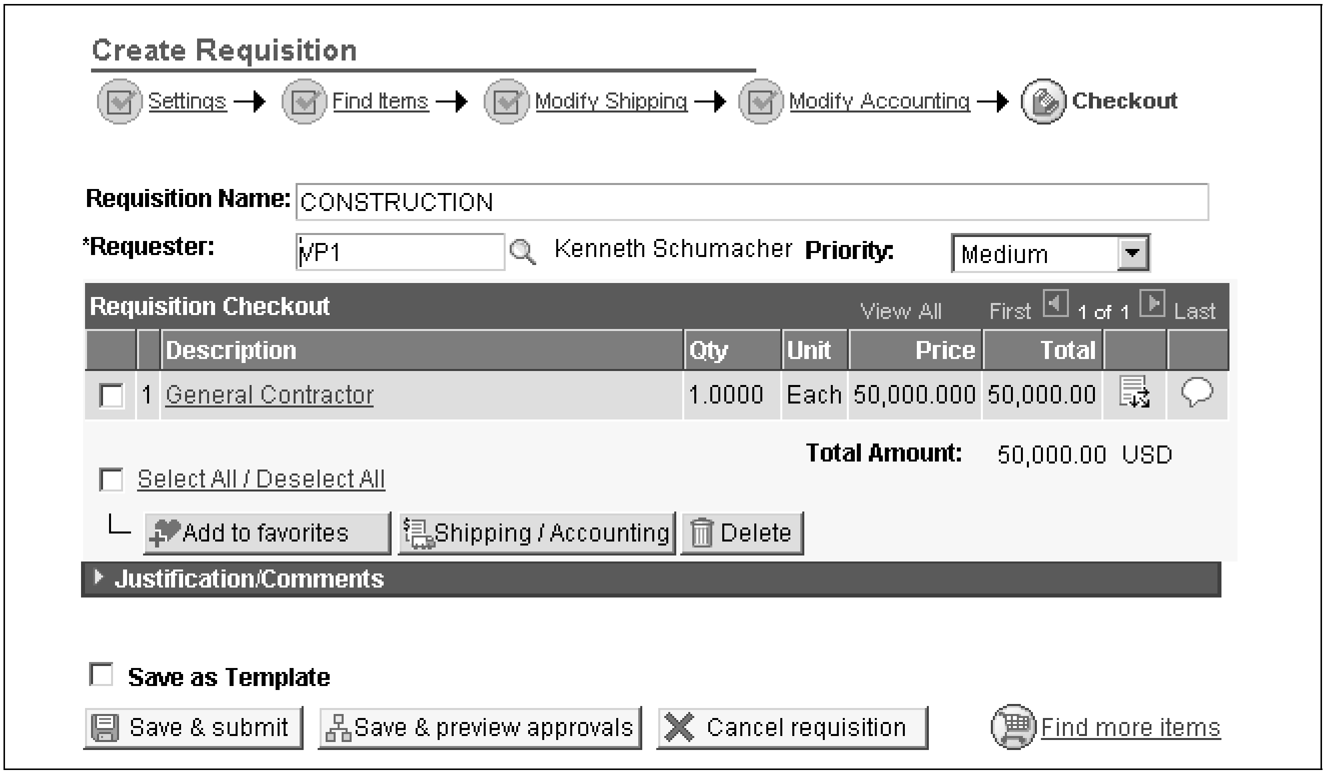
Vendor Name
Enter the name of the preferred vendor.

Contract
Select to indicate that the supplier has signed the service agreement.

Notify the Administrator
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.

Using the Requisition Checkout

Access the Requisition Checkout page.



Requisition Checkout page

Requisition Name	Enter the requisition name.
Requestor	Select the requestor of the service requisition **Note.** You are only allowed to edit the requestor if you are authorized to request on behalf of other users on the requester procurement user preferences page.
Priority	Select the priority of the service requisition. The default is medium priority.
Description	Click the Description field to edit the service requisition.
Shipping and Accounting	Click the Shipping and Accounting button to update the shipping information. The department defaults from the user preferences.
Comments	Click the Comments icon to add comments for the service requisition line. Comments can be shown to the supplier if the Send Comment to Vendor check box is checked.
Save as Template	If you have PeopleSoft eProcurement installed on your system with PeopleSoft Services Procurement, and you have requisition lines for items, you can use this check box to add the line as a catalog item to the template. However, if you click this check box for a PeopleSoft Services Procurement requisition line, you receive an error message since you can't add services to templates.

Creating Deliverables Based Requisitions

This section provides an overview of deliverables requisitions and discusses how to create and maintain them.

Pages Used to Create Deliverables Based Requisitions

Page Name	Object Name	Navigation	Usage
Services	SPF_REQ_INFO_PG	Services Procurement, Create Requisitions Click the Services tab.	Enter basic service requisition information.
Activities by Requisition	SPF_REQLN_ACT	Click the Services Activities link on the requisition.	Associate the activities to be performed by the service provider for this deliverables based requisition. This defaults from the Activities by Service page. This link becomes available when you select a deliverables based service.
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 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 isn't in the system yet.

Creating Deliverables Based Requisitions

To create a deliverables based requisition:

1. Access the Create Requisitions page, add a requisition name.
2. Access the Create Requisitions - Services page.

   Select a Service Type with a Service Method of *Deliverable*.
3. The system defaults job title, scope of work and competencies based on attributes associated with the service.
4. Enter a project, a required field.

   The start and end date default from the project. If the project start date is in the past, the current date defaults to the start date.
5. Because this is a deliverables based requisition, you must enter a price for the entire deliverable rather than hourly rates.
6. The service coordinator and progress log approver are defaulted from Service Requester defaults.
7. The system provides the settlement options as a default from the service.

See Also

Chapter 9, “Creating and Managing Requisitions,” Creating Service Resource Requisitions, page 115

Chapter 7, “Managing Projects,” page 105

Associating Bid Factors to Deliverables Based Requisitions

Access the Bid Factors by Requisition Line page.

For deliverables based requisitions, the system provides bid factors as a default from Bid Factors by Service, Bid Factors By Activity, Bid Factors by Item Category or from Deliverable Service type flag on the Bid Factor Mapping page; the system eliminates duplicates.

Bid factors enables the supplier 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 supplier answers all the bid factor lines and questions associated to each bid factor code when bidding on the services requisition.

Bid factor weightings must equal 100. If you don’t ensure that your bid factors equal 100, the system weighs each bid factor equally. When the service coordinator sources the requisition, they can update the bid factor weightings on the Manage Sourcing page.

See Also

Chapter 10, “Managing Requisition Sourcing,” Managing Sourcing, page 143

Managing Activities by Requisition

Access the Activities by Requisition page.

For deliverables based requisitions, the system links activities for the service onto the requisition. The supplier logs progress against these activities. Bid factors linked to these activities appear on the Bid Factors by Requisition page.

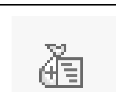
The requestor can add activities if the *Allow Add Activities* check box is selected on the Service/Project Role page. When activities are added to this page, their associated bid factors are added to the Bid Factors by Requisition page.

Managing Service Requisitions

This section discusses how to:

- Manage requisitions.
- Review service requisition details.

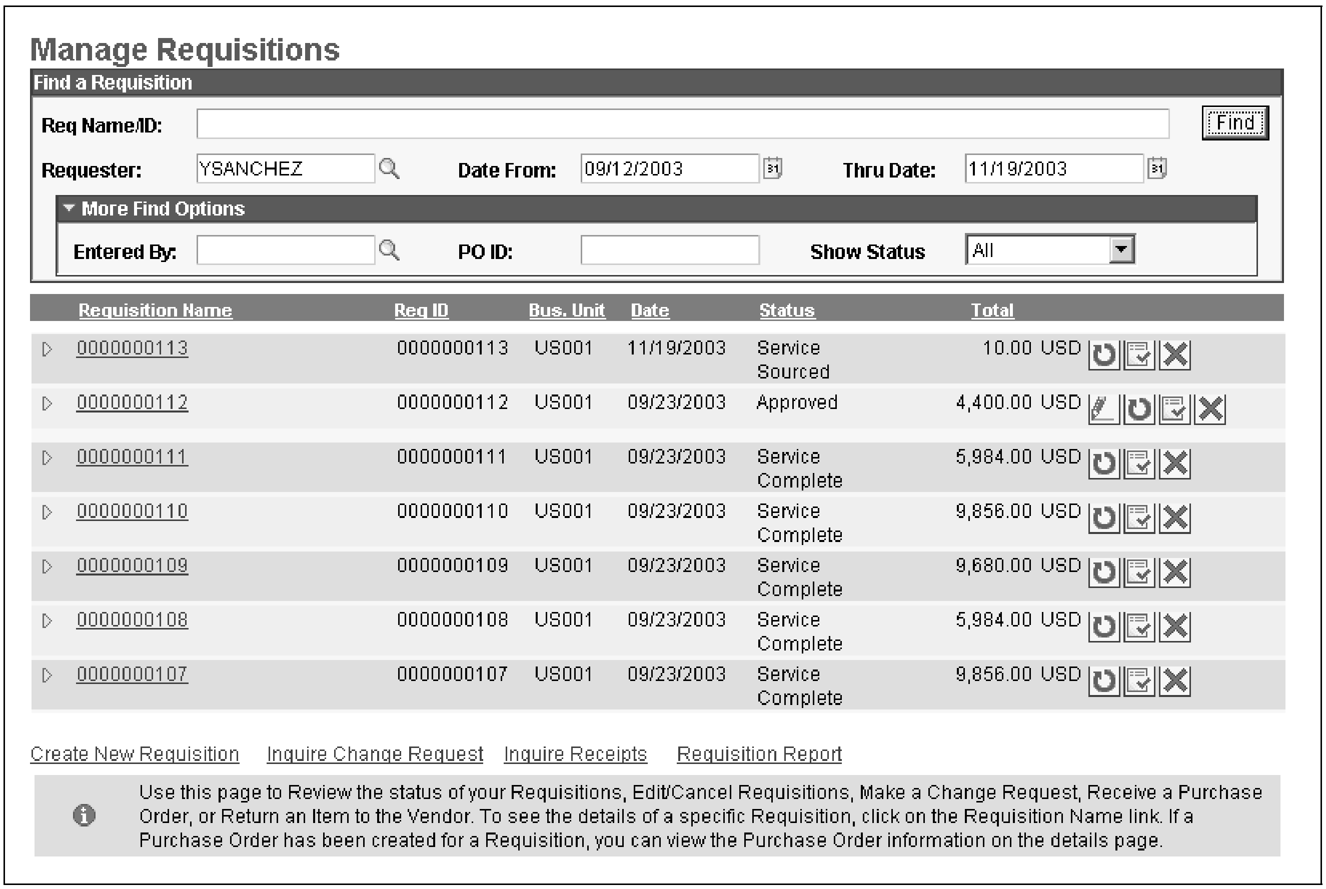
Pages Used to Manage Service Requisitions

Page Name	Object Name	Navigation	Usage
Manage Requisition	PV_REQ_STATUS	Services Procurement, Home page, 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	Click the Edit Requisition link on the Manage Requisition page.	Use to edit a services requisition.
Edit Requisition	SPF_REQ_INFO_PG	Click the linked job title on the Requisition Details page.	Edit a requisition.
Requisition History	SPF_REQ_HISTORY	Click the Requisition History link on the Edit Requisition page.	View the requisition status by date.
Sourcing Selection	SPF_SOURCE_SELECT	Click the Sourcing Selection link on the Edit Requisition page.	Choose lines for sourcing. **Note.** You only have access to the sourcing selection page if you are authorized to source requisitions.
Sourcing Review	SPF_SOURCE_REVIEW	Click the Sourcing Review link on the Edit Requisition page.	Review the sourcing relationship with the supplier. **Note.** You only have access to the sourcing review page if you are authorized to source requisitions.
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.	Use to view VAT calculations and information for the selected schedule or distribution. **Note.** You only have access to VAT information if the Purchasing business unit has enabled VAT on requisitions and VAT is applicable for the requisition.

Page Name	Object Name	Navigation	Usage
Requisition Cycle	PV_REQ_CYCLE_PAGE	Click the Requisition Cycle button on the Manage Requisitions or Requisition Details pages.	View the location of a requisition in the requisition life cycle.
Manage Approvals	PV_APPR_MGR2	Click the Manage Approvals link on the Requisition Cycle page.	Use to view requisitions by approval status.
Requisition Approval Status	PV_REQ_APPROVAL	Click the Approval Status button on the Manage Requisitions page.	View the approval status for a requisition.

Managing Requisitions

Access the Manage Requisitions page.

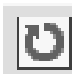


Manage Requisitions page

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.

Requester Select 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 purchase.

PO Number(purchase order) If you have PeopleSoft eProcurement installed, enter a purchase order number to locate the requisition that is associated with that purchase order. Purchase orders apply only to the commodity items (eProcurement requisition lines). Service items are on the purchase order that is generated by the work order, not the requisition.



Click the Requisition Cycle button to access the Requisition Cycle page, where you can view the requisition's status in the requisition process.

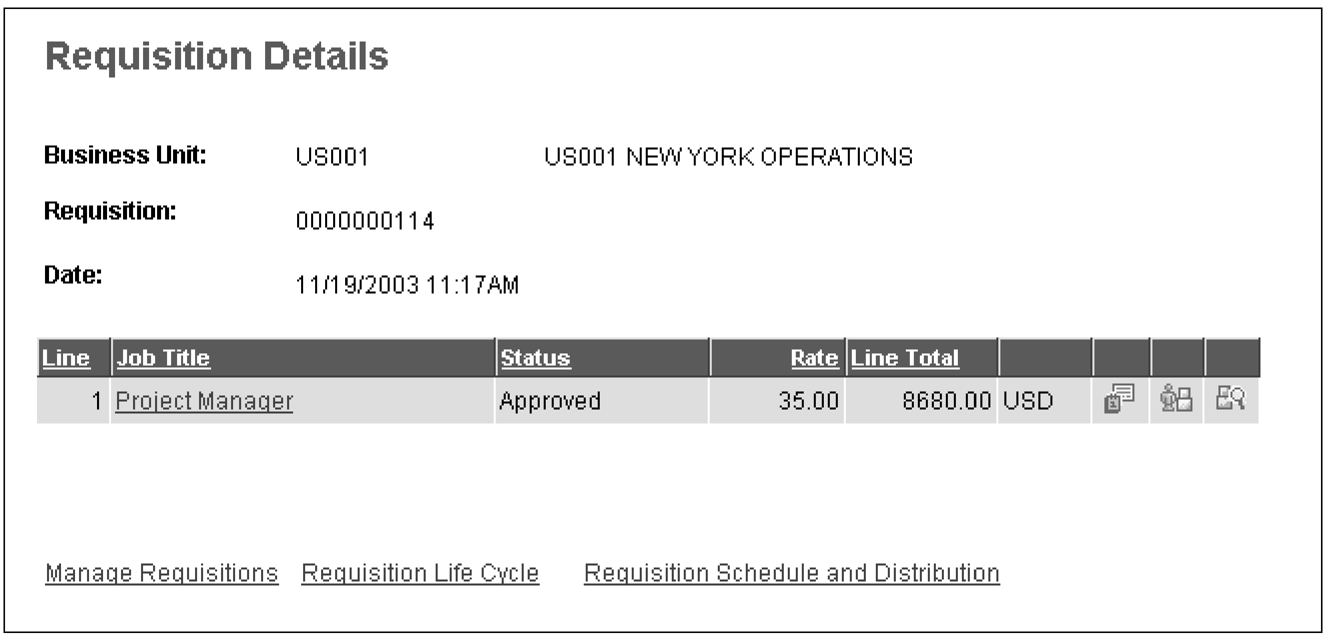
Click the Approval Status button to view the requisition's approval status.

Click the Cancel Requisition button to access the Requisition Details page, where you can cancel this requisition.

Note. You can create commodity items (with PeopleSoft eProcurement) and service items (with PeopleSoft Services Procurement) on the same requisition. Each item has a separate line.

Reviewing Requisition Details

Access the Requisition Details page.



Requisition Details page

Legend

Click the Sourcing Selection button to access the Sourcing Selection page, where you can source the requisition to suppliers in the network.

Note. This button is available only to users who have one of the roles defined for the role action *SP_SRVC_COORDINATOR*.

Click the Sourcing Review button to access the Sourcing Review page, where you can review information that is related to the suppliers to whom the requisition has been sourced. For example, you can view the number of bids that are submitted.

Click the Work Order button to generate a work order for a requisition.

Note. This option appears only if the status of the work order is *Filled.*

See Also

Chapter 13, “Managing Work Orders,” page 175

Chapter 5, “Implementing PeopleSoft Services Procurement Workflow,” page 87

Chapter 10, “Managing Requisition Sourcing,” page 133

CHAPTER 10

Managing Requisition Sourcing

This chapter provides an overview of sourcing and discusses how to:

- Source requisitions.
- Manage sourcing.

Understanding Sourcing

This section lists prerequisites and discusses services sourcing.

Prerequisites

Before you can source a requisition, the following conditions must be met:

- The requisition must be approved.
- Suppliers must be defined for the Business Unit supplier network.

See Also

Chapter 3, “Implementing Your PeopleSoft Services Procurement System,” Configuring the Supplier Network, page 74

Services Procurement Sourcing Rules

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 entered and approved, service coordinators can source the requisitions using pre-defined sourcing rules.

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 are resource based 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.

Suppliers who are deliverables based can be defined by service/project role. This enables you to define which suppliers provide the best service. To further refine the deliverables based supplier list, you can define suppliers by region and service.

On the Services Procurement business unit, you can determine which sourcing rule takes precedence, the region or the service/service type. If you select region, the system looks first for suppliers who match the region and service/service type, then for suppliers matching that region, the service/service type and lastly suppliers by 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

“Preface,” page xxiii

Chapter 18, “Supplier Scoring for PeopleSoft Services Procurement,” page 295

Sourcing Requisitions

This section provides an overview of the requisition sourcing process and discusses how to:

- View the worklist.
- Source requisition requirements.
- Adjust bid factor weightings.
- Reassign approved requisitions.

Understanding the Requisition Sourcing Process

Here is an overview of the process for sourcing a requisition:

1. Access the Worklist page.

   Click the link for the requisition ID that you want to source.

2. Access the Sourcing Selection page.

   Select approved requisitions to source to suppliers that are listed according to the sourcing rules.

3. Access the Reassign Requisition page.

   If the requisition line should be sourced by someone else, 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.

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6. Click the Submit button at the bottom of the Sourcing Selection page to submit requisitions to the selected list of suppliers.

   Note. Clicking the Submit button triggers a PeopleSoft Strategic Sourcing event. All bid factors are associated with this event.

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7. Access the Sourcing Review page.

   Review the list of suppliers to whom you have sourced the requisition.

8. Access the Sourcing History page.

   View the history for individual suppliers.

Pages Used to Source Requisitions

Page Name	Object Name	Navigation	Usage
Worklist	WORKLIST	Home, Worklist	Locate approved requisitions for sourcing using the worklist filter *sPro Approved Requisition*.
Sourcing Selection	SPF_SOURCE_SELECT	From the Worklist page, click the link that corresponds with the requisition ID that you want to source.	Enter sourcing requirements.
Job Summary	SPF_REQ_SUMMARY_PG	Click the linked requisition number.	Provides a summary of the requisition job requirements.
Activities by Requisition	SPF_REQ_ACT	Click the Activities by Requisition link from the Sourcing Selection page.	View activities defined for a requisition. You can add activities only if the service on the requisition has *Allow add activities* selected. **Note.** The Activities by Requisition link is only displayed for deliverables based requisitions.
Bid Factor Weighting	SPF_BDFTR_WEIGHT	Click the Bid Factors Weighting link on the Sourcing Selection page.	Adjust the 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.	If you have the proper permission, change the sourcing preferences for the requisition.
Re Assign Requisition Line	SPF_SRC_REASSIGN	Click the Re-assign link from the Sourcing Selection page.	Reassigns a requisition line to a different service coordinator.
Sourcing Review	SPF_SOURCE_REVIEW	Click the Sourcing Review link on the Sourcing Selection page.	Review sourcing requirements.
Sourcing History	SPF_SOURCE_HISTORY	Click the Sourcing History button on the Sourcing Review page.	Review sourcing history.
Manage Sourcing	SPF_SRC_MANAGE_PG	Services Procurement, Review and Source Requisitions	Review requisitions and source them to suppliers. Check incoming and outgoing bids, generate work orders, view the requisition lifecycle or cancel a requisition.

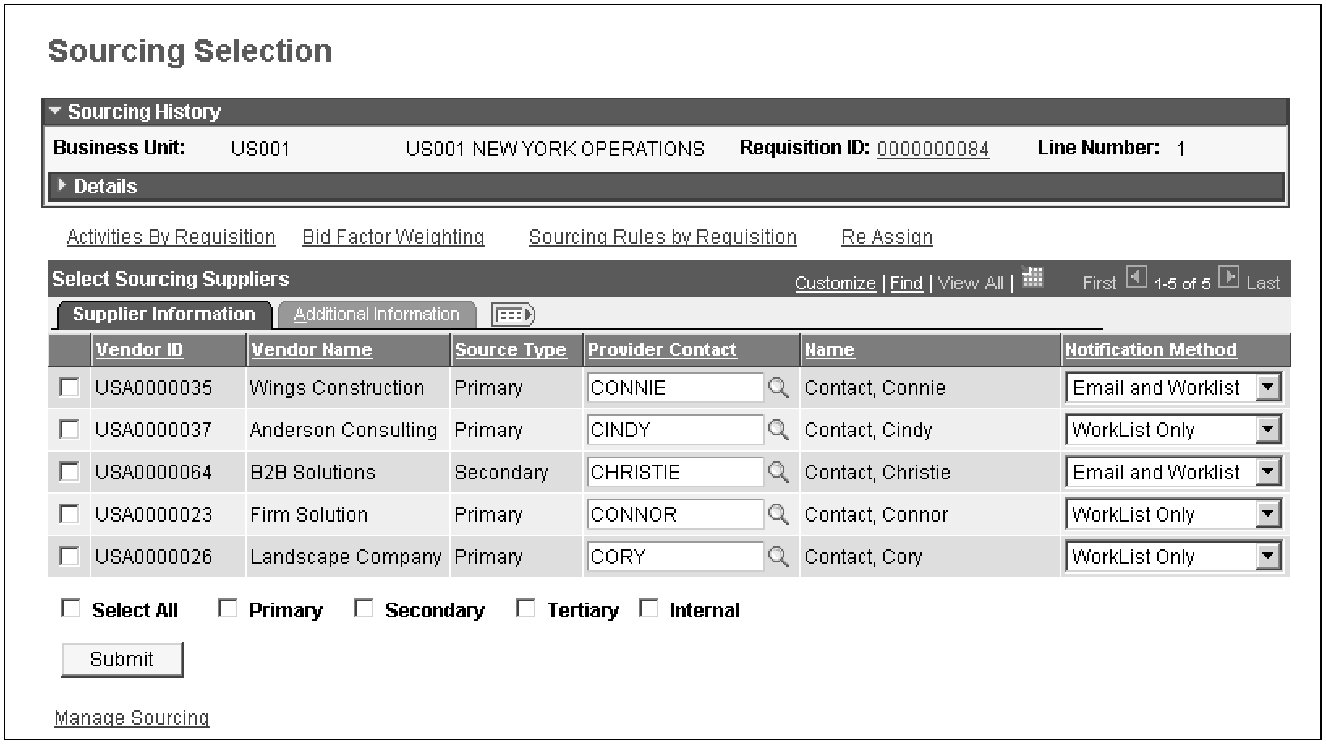
Viewing the Worklist

Access the Worklist page.

Link — Click the link that corresponds to the requisition ID that you want to source using the worklist filter *sPro Approved Requisition*. Clicking this link opens the Sourcing Selection page, where you can source the requisition.

Sourcing Requisition Requirements

Access the Sourcing Selection page.



Sourcing Selection page

Supplier Information

Source Type — Indicates whether the supplier is *Internal, Primary, Secondary,* and *Tertiary.*

Provider Contact — Displays the provider contact name and ID.

Notification Method — Select *Email and Worklist* to send an email notification along with the worklist or *Worklist Only.*

Additional Information

Sourcing Status — Displays the sourcing status *Sourced* or *Unsourced.*

Selection Level — View the Vendor Selection level values.

Options for resource based requisitions are *Region Service Type, Service Type, Region, Preferred,* or *Supplier Network.*

Options for deliverable based requisitions are *Region Service* , *Service, Region, Preferred,* or *Supplier Network.*

Note. The selection level indicates the level from which the supplier is selected. Selection levels are only visible for unsourced lines.

Contract Indicates whether the supplier has a contract.

Note. This field only appears if service contracts are enabled on the Services Procurement Installation Options and if *Include all Contract Suppliers* is selected on the Services Procurement business unit.

 Click the Score Analysis button to view the analyzed score.

See Also

Chapter 3, “Implementing Your PeopleSoft Services Procurement System,” Setting Up Suppliers by Service Type and Region, page 77

Chapter 3, “Implementing Your PeopleSoft Services Procurement System,” Configuring the Supplier Network, page 74

Activities by Requisition

Access the Activities by Requisition page.

Activities by Requisition page

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. Click the

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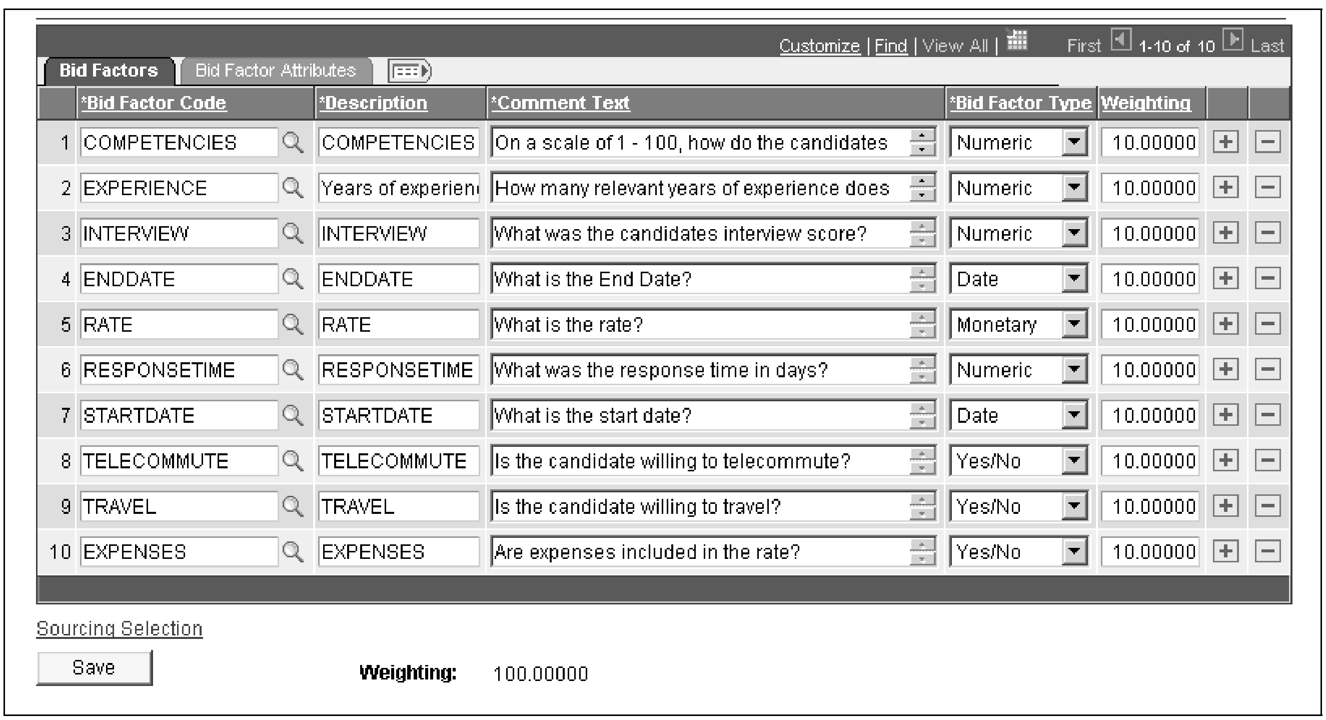
Note. You can only add activities if the service on the requisition has *Allow add activities* selected and the requisition is for a deliverables based service. You can not add activities after the requisition has bee sourced.

Adjusting Bid Factor Weightings

Access the Bid Factor Weighting page.

Bid Factor Weighting page (page 1 of 2)



Bid Factor Weighting page (page 2 of 2)

Comment Text	View the bid factors that are associated with a specific requisition.

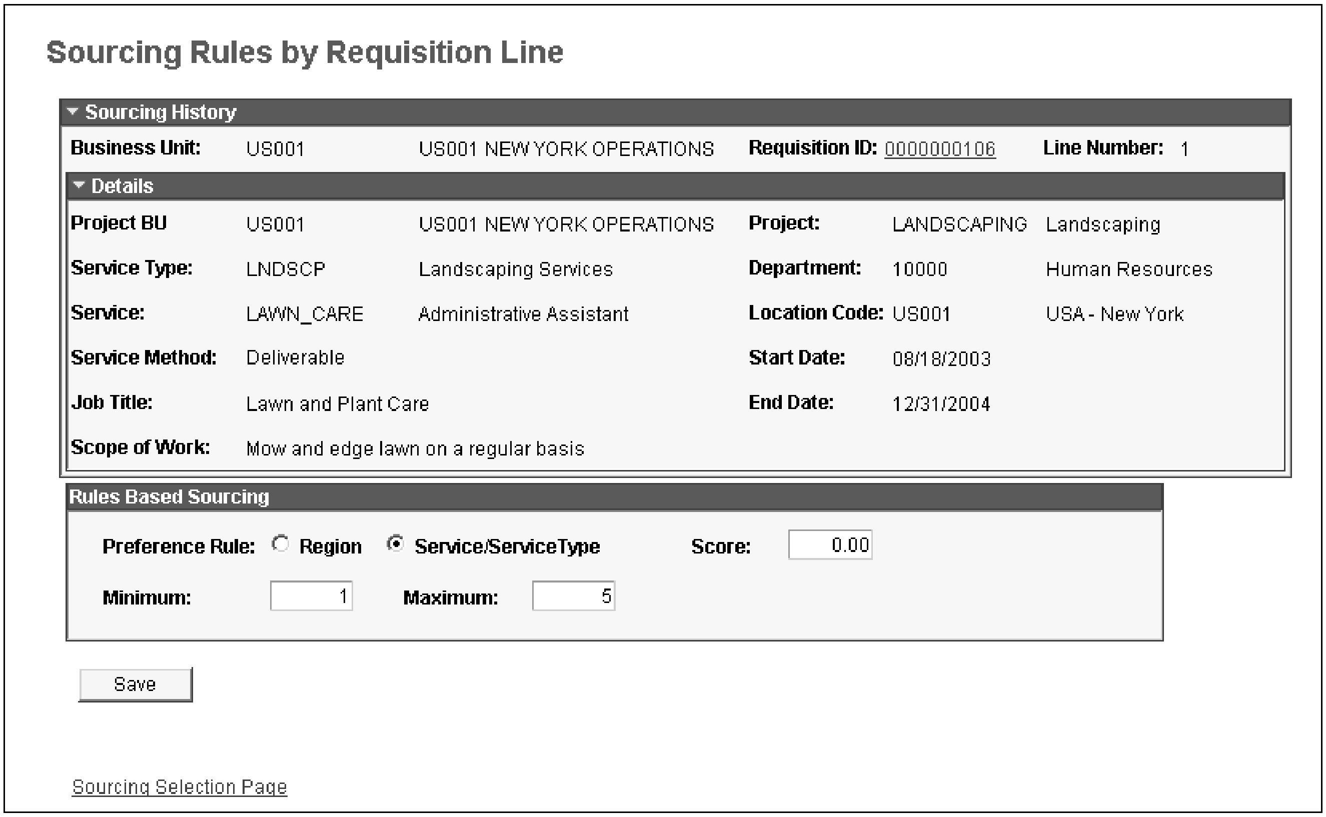
Weighting

Adjust the weightings of each bid factor to determine its level of importance. For example, if the candidate start date were the most important qualification, you would weigh that bid factor more heavily than others.

Note. The total of all bid factor weightings must equal 1.

Managing Sourcing Rules by Requisition Line

Access the Sourcing Rules by Requisition Line page.



Sourcing Rules by Requisition Line page

If the sourcing engine returns too many rows, you can access this page to refine your search. You can only access this page if you have the permissions on the service coordinator defaults.

Preference Rule

Select Region to indicate that it's more important to select suppliers within the same region or Service/Service Type to indicate that it's more important to select suppliers that provide the right service or service type.

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

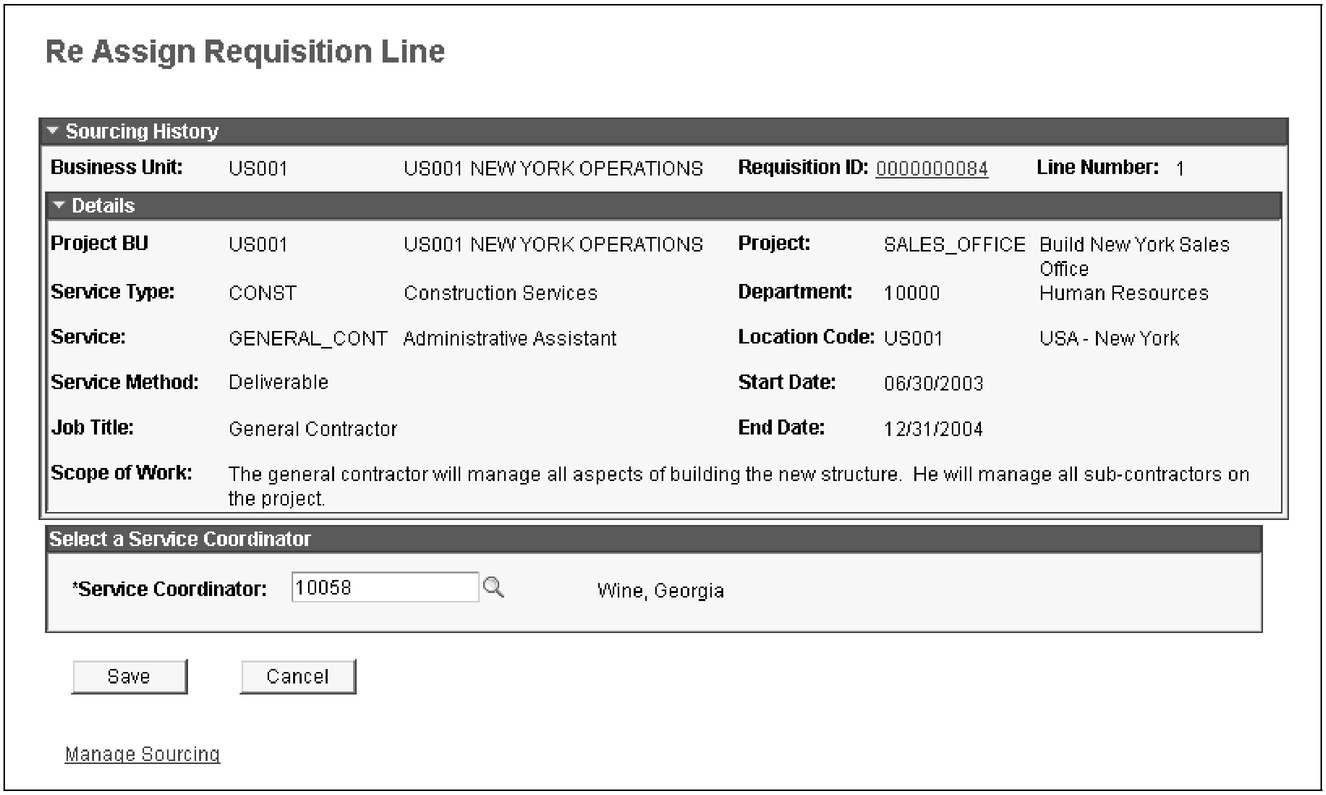
Click to include all suppliers that have an existing contract for the desired role.

Note. This check box is only available for resource based requisitions.

Save Click to save to save changes. Upon clicking the Sourcing Selection page link, the sourcing engine runs again using the new parameters.

Reassigning Requisition Lines

Access the Re Assign Requisition Line page.



Re Assign Requisitions Line page

Service Coordinator Select a service coordinator to reassign the lines.

Viewing the Sourcing Review

Access the Sourcing Review page.

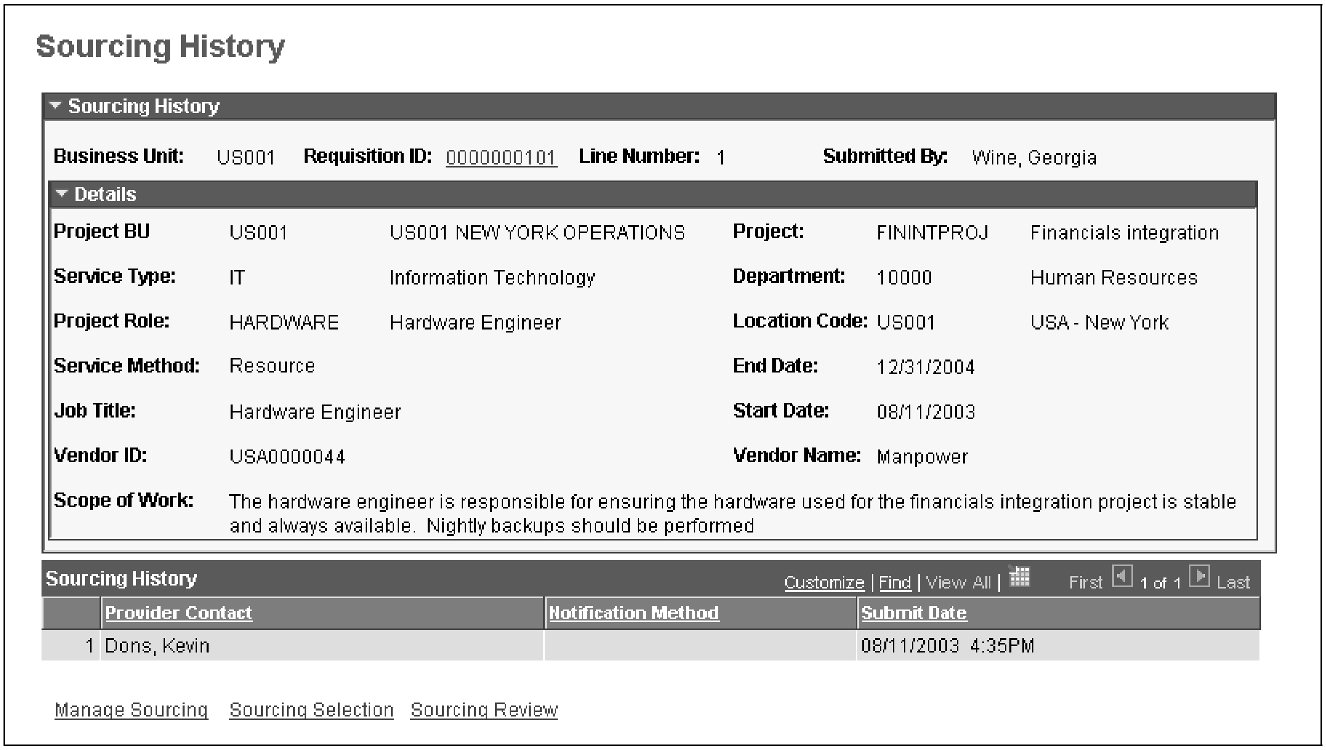
Sourcing Review page

No. of Times Sent View the number of times this vendor has been sourced for this requisition line.

No. of Submittals View number of bids from the supplier.

Viewing the Sourcing History

Access the Sourcing History page.



Sourcing History page

The sourcing history includes the service coordinator that submitted the requisition to be sourced, the vendor contact, the notification method and submit date.

Managing Sourcing

This section discusses how to manage sourcing.

page Used to Manage Sourcing

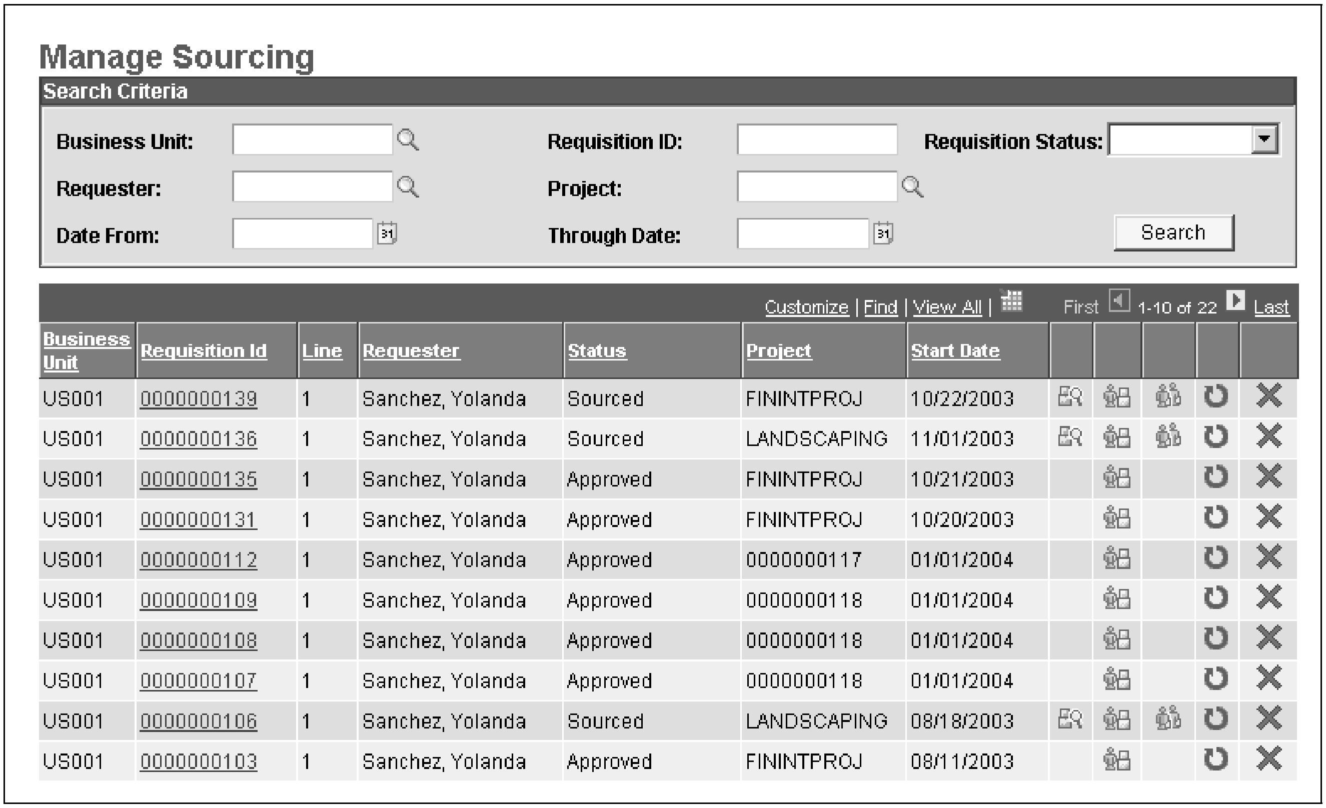
Page Name	Object Name	Navigation	Usage
Managing Sourcing	SPF_SRC_MANAGE_PG	Services Procurement, Review and Source Requisitions	View all the suppliers to whom a requisition was sourced; source a requisition to multiple suppliers.
Sourcing Review	SPF_SOURCE_REVIEW	Click the Sourcing Review button on the Sourcing Selection page.	Review sourcing requirements.
Sourcing History	SPF_SOURCE_HISTORY	Click the Sourcing History button on the Sourcing Review page.	View sourcing history.
Sourcing Selection	SPF_SOURCE_SELECT	Click the Sourcing Select button on the Manage Sourcing page.	Enter sourcing requirements.
Incoming Bid Summary	SPF_CLI_BID_IN	Fulfill Job Requisitions, Maintain Communications Click the Supplier Communications button on the Manage Sourcing page.	View client incoming bids.
Requisition Life Cycle	PV_REQ_CYCLE_PAGE	Click the Requisition Life Cycle button on the Manage Sourcing page.	View the requisition life cycle.
Work Order Details	SPF_WO_REQ_VEN_DT	Click the Work Order button on the Manage Sourcing page.	View or create the related work order.

See Also

Chapter 3, "Implementing Your PeopleSoft Services Procurement System," Setting Up Business Units, page 25

Managing Sourcing

Access the Managing Sourcing page.



Business Unit	Requisition Id	Line	Requester	Status	Project	Start Date
US001	0000000139	1	Sanchez, Yolanda	Sourced	FININTPROJ	10/22/2003
US001	0000000136	1	Sanchez, Yolanda	Sourced	LANDSCAPING	11/01/2003
US001	0000000135	1	Sanchez, Yolanda	Approved	FININTPROJ	10/21/2003
US001	0000000131	1	Sanchez, Yolanda	Approved	FININTPROJ	10/20/2003
US001	0000000112	1	Sanchez, Yolanda	Approved	0000000117	01/01/2004
US001	0000000109	1	Sanchez, Yolanda	Approved	0000000118	01/01/2004
US001	0000000108	1	Sanchez, Yolanda	Approved	0000000118	01/01/2004
US001	0000000107	1	Sanchez, Yolanda	Approved	0000000118	01/01/2004
US001	0000000106	1	Sanchez, Yolanda	Sourced	LANDSCAPING	08/18/2003
US001	0000000103	1	Sanchez, Yolanda	Approved	FININTPROJ	08/11/2003

Manage Sourcing page

The Manage Sourcing page is the central location for maintaining requisitions that need to be sourced and filled. Use the Search and Sort features to streamline search results. After you access the Manage Sourcing page, proceed to the roster area, where you can access the Sourcing Selection page or review sourcing requirements. You can also cancel requisitions here.

 Click to access the Sourcing Review page.

 Click to access the Sourcing Selection page.

 Click to access the Supplier Communication pages.

 Click to access the Requisition Life Cycle page.

 Click to access the Work Order Detail page.

 Click to cancel the selected requisition.

CHAPTER 11

Submitting and Managing Bids

This chapter provides an overview of the bid process for suppliers and discusses how to:

- Submit candidates for resource requisitions.
- Submit bids for deliverables based requisitions.
- View incoming bids and create bid responses.
- View outgoing bids.
- Manage service providers.

Understanding the Requisition Bidding Process

In PeopleSoft Services Procurement, the requisition bidding process enables suppliers to collaborate and communicate with service coordinators to successfully match qualified bids with open service requisitions.

Requisitions can be either resource or deliverables based. If the 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.

PeopleSoft Services Procurement enables your suppliers to:

- Review sourced requisitions.
- Submit bids.
- Review incoming and outgoing bid information.
- View bid history.
- View interview schedules.
- Manage service providers.

The basic task flow of the requisition bidding process for suppliers is as follows:

1. Access the Supplier Sourcing Review page to review requisitions that were sourced to the supplier for consideration.
2. Use the Submit Bid page to submit bids that meet requisition requirements.
3. After the supplier submits a bid to the service coordinator for review and the service coordinator responds, the supplier uses the Incoming Bid Summary page to view the bid response from the service coordinator.
4. The supplier uses the Supplier Bid Response page to respond to the service coordinator.

Note. Negotiation between the supplier and service coordinator is typically an ongoing process. Once the service coordinator chooses the action *Fill Requisition,* 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

"Preface," page xxiii

Prerequisites

A requisition must be sourced to the supplier before they can submit a bid.

Submitting Candidates for Resource Requisitions

This section discusses how suppliers:

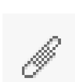
- Submit candidate information for resource requisitions.
- Create candidate profiles.

Pages Used to Submit Candidates for Resource Requisitions

Page Name	Object Name	Navigation	Usage
Supplier Sourcing Review	SPF_SOUR_REVIEW_SP	Fulfill Service Requisitions, Review Reqs/Submit Bids	Review requisitions sourced to the supplier.
Submit Bid	SPF_SUBMITAL_PAGE	Click the Submit Another Bid button on the Supplier Sourcing Review page.	Submit candidate information.
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 Resume Attachment button on the Submit Bid page.	Attach the candidate’s resume to the bid.
Currency Information	EXCH_RT_DTL_INQ	Click the Rate Detail link on the Submit Bid page.	View currency conversion information.
Bid Attachments	SPF_BID_ATTACH	Click the Add Attachment link on the Submit Bid page.	Upload attachments to bid.
Sourcing History	SPF_SOURCE_HISTORY	Click the View History button on the Supplier Sourcing Review page.	View sourcing history.
Comments	PV_SP_REQ_COMMENTS	Click the Comments button on the Supplier Sourcing Review page.	Use to view comments associated with the requisition. **Note.** Comments are only visible if the requester has selected the option to send to the comments to the vendor.

Submitting Candidate Information for Resource Based Requisitions

Access the Submit Bid page.



Click to attach a resume for the candidate.

Note. The supplier must select an existing candidate or create a new candidate profile before attaching a resume.

Create Candidate Click to create attributes and establish competencies for a new candidate.

Note. This button is active only after the supplier selects the Submit New Candidate radio button at the top of the page.

Enter Bid Information

Location

Enter the vendor location to determine the bidding currency. If the vendor location currency is set to *Default* then the Purchasing business unit currency is used.

Action

Displays the *Submit* action by default. Additional actions are available only after the supplier submits a candidate.

Note. 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.

Note. After the supplier submits the first candidate, they can submit additional candidates for the requisition until they reach the maximum number of submittals.

If the system supports vendor rate breakdown, the supplier may enter the pay rate, fixed cost, markup, and third party markup. The sum of the rates is the bid rate.

Pay Rate

Enter base rate for the service provider.

Fixed Cost

Enter fixed overhead rate.

Vendor Markup

Enter the markup rate for the vendor.

Third Party Markup

Enter third party markup rate, if any.

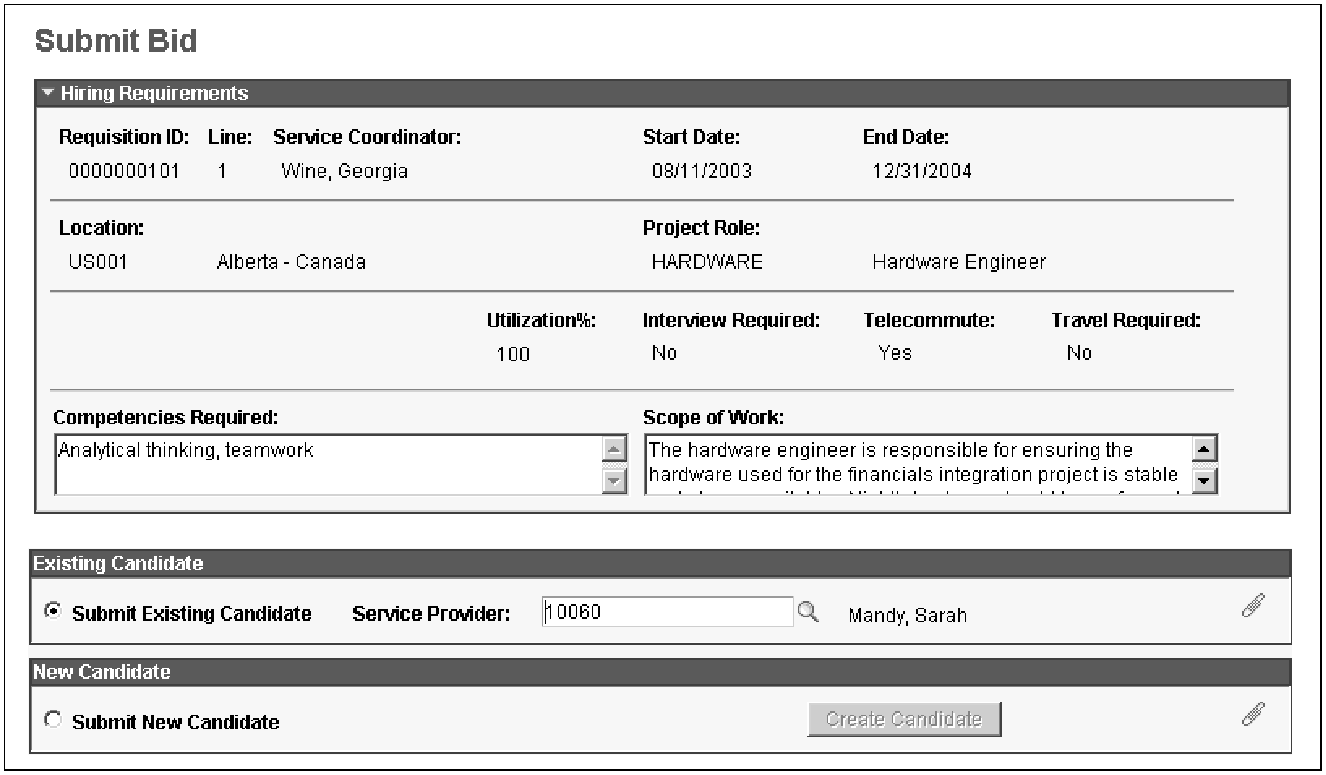
Third Party Vendor

Enter third party vendor name. This is required if you enter a third party markup.

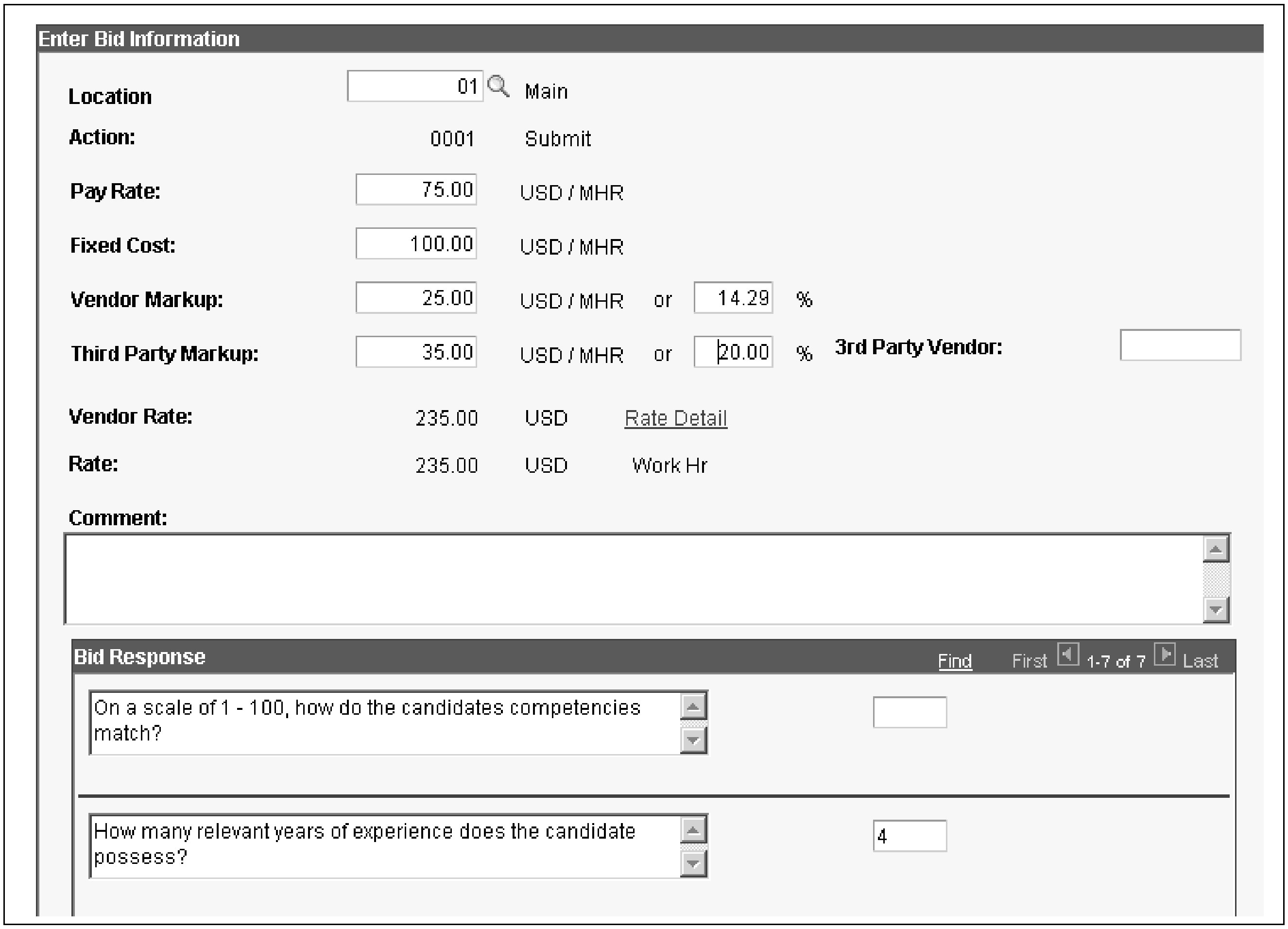
Note. You define the Pay Type field labels on the Services Procurement Pay Types page. Pay type fields are only visible if they are enabled on the Services Procurement business unit.

Create Candidate Profiles

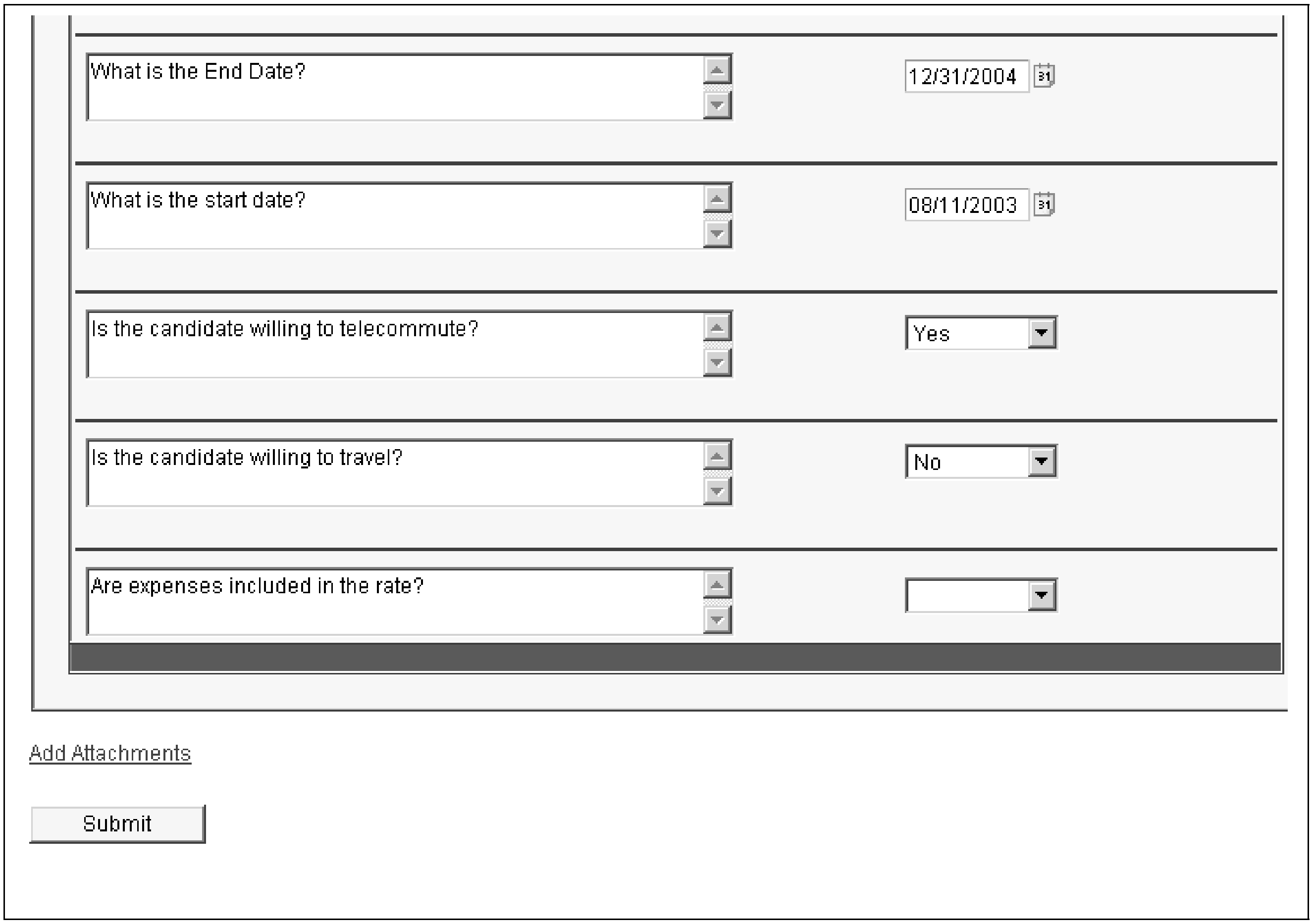
Access the New Candidate page.



Submit Bid page (page 1 of 3)



Submit Bid page (page 2 of 3)



Submit Bid page (page 3 of 3)

Role	Identify the main role of the new candidate.
Competency	Identify the main skills associated with the new candidate.
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.

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.

See Also

Chapter 3, "Implementing Your PeopleSoft Services Procurement System," Setting Up Users, page 63

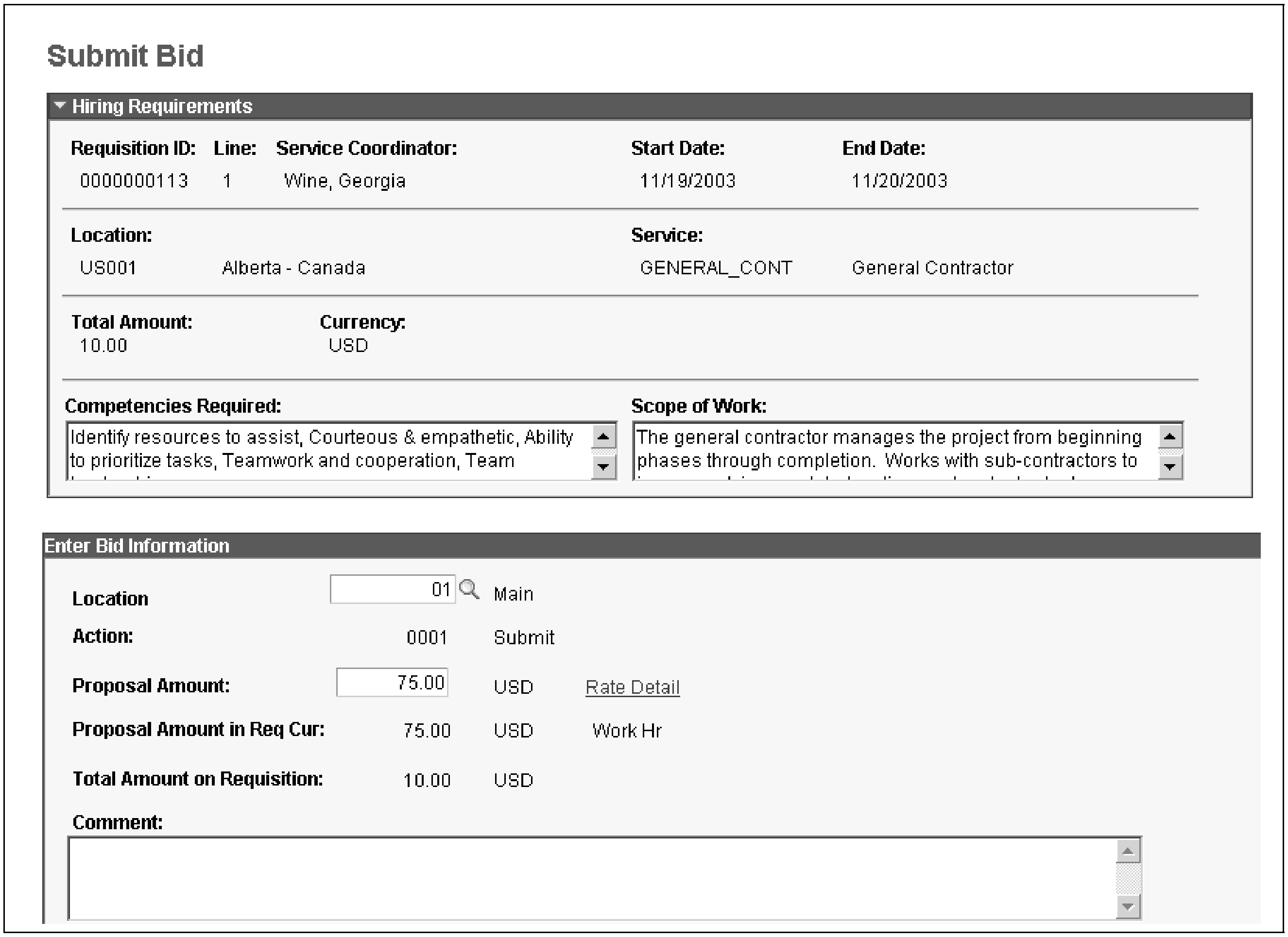
Submitting Bids for Deliverables Based Requisitions

Pages Used to Submit Bids for Deliverables Based Requisitions

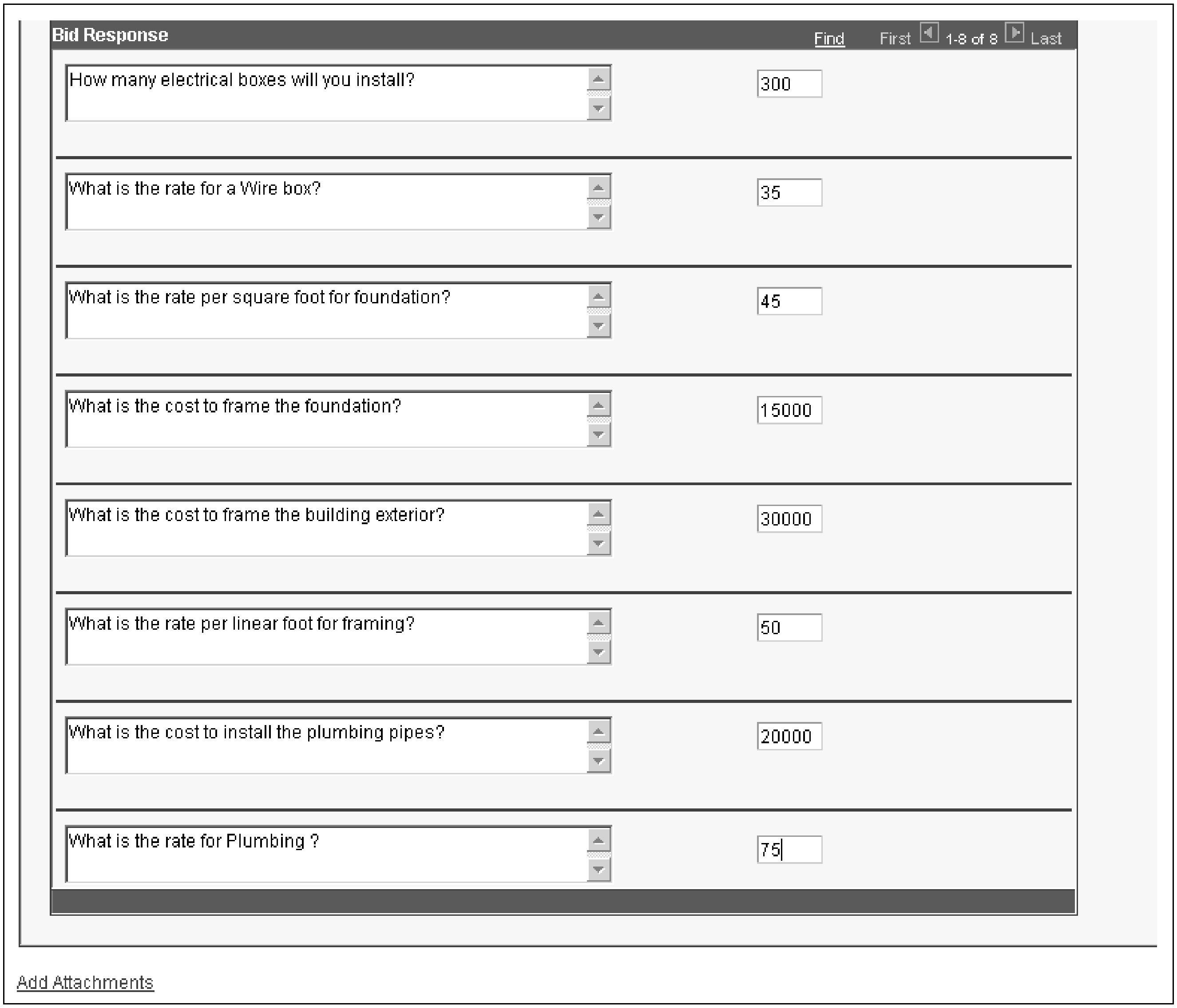
Page Name	Object Name	Navigation	Usage
Supplier Sourcing Review	SPF_SOUR_REVIEW_SP	Fulfill Service Requisitions, Review Reqs/ Submit Bids	Review requisitions sourced to suppliers.
Submit Bid	SPF_SUBMITAL_PAGE	Click the Submit Bid button on the Supplier Sourcing Review page.	Submit bid.
Currency Information	EXCH_RT_DTL_INQ	Click the Rate Detail button on the Submit Bid page.	View currency conversion information.
Bid Attachments	SPF_BID_ATTACH	Click the Add Attachment link on the Submit Bid page.	Upload attachments to bid.
Sourcing History	SPF_SOURCE_HISTORY	Click the View History button on the Supplier Sourcing Review page.	View sourcing history.
Comments	PV_SP_REQ_COMMENTS	Click the Comments button on the Supplier Sourcing Review page.	Use to view comments associated with the requisition. **Note.** Comments are only visible if the requester has selected the option to send to the comments to the vendor.

Submitting Bids for Deliverables Based Requisitions

Access the Submit Bid page.



Submit Bid (page 1 of 2)



Submit Bid (page 2 of 2)

Enter Bid Information

Location Enter the vendor location to determine the bidding currency. If the vendor location currency is set to *Default* then the Purchasing Business unit currency is used.

Action Displays the *Submit* action by default. Additional actions are available only after you submit the bid.

Proposal Amount Enter the total proposal amount for the entire deliverables requisition.

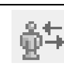
Note. Rates and quantities entered in any bid factor responses do not need to total up to the proposal rate.

Viewing Incoming Bids and Creating Bid Responses

This section discusses how suppliers:

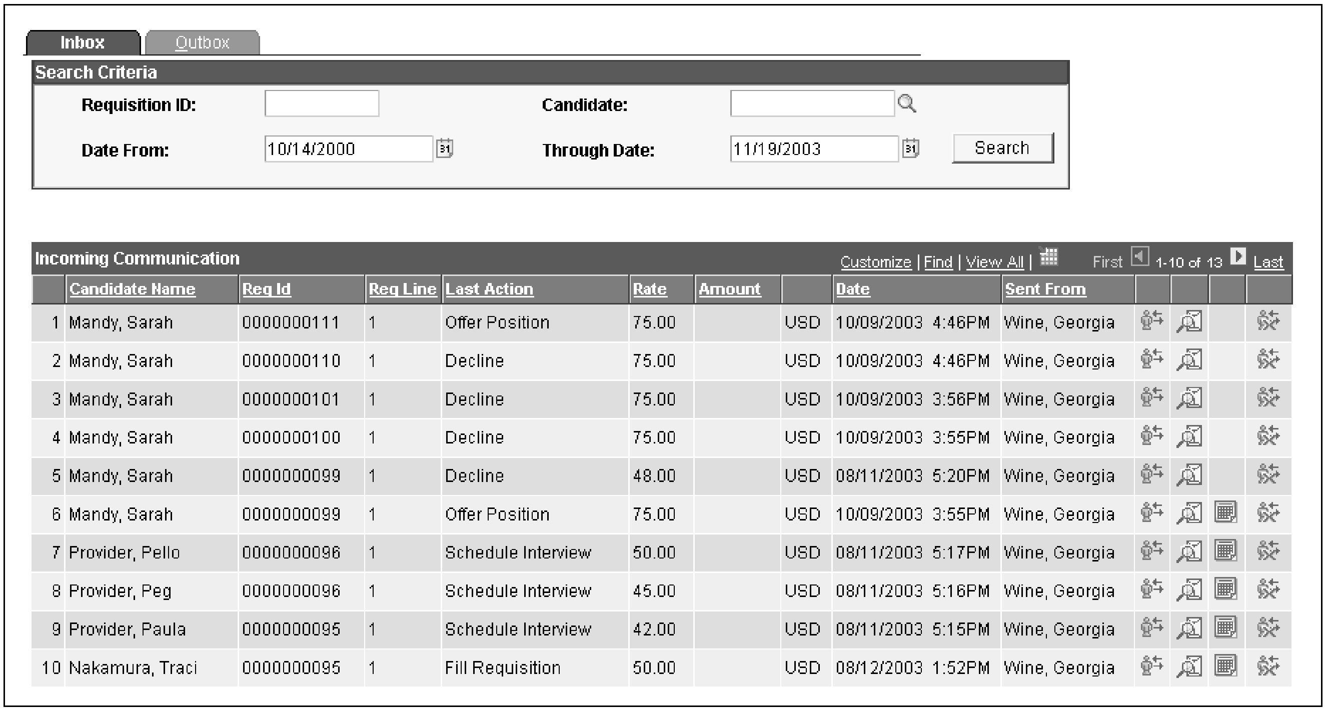
- View incoming bid information.
- Create supplier bid responses.

Pages Used to View Incoming Bids and Create Bids

Page Name	Object Name	Navigation	Usage
Incoming Bid Summary - Inbox	SPF_SUP_COM_IN	Fulfill Service Requisitions, Maintain Bids	View incoming bids.
Supplier Bid Response	SPF_SUP_BIDRSP1	 Click the Create Bid button on the Incoming Bids Summary - Inbox page.	Create bid.
Currency Information	EXCH_RT_DTL_INQ	Click the Rate Detail button on the Submit Bid page.	View currency information.
Bid History	SPF_BID_HISTORY	Fulfill Service Requisitions, Bid History  Click the Bid History button on the Incoming Bid Summary page.	View bid history.
Interview Schedule	SPF_INTERVIEW_SCHD	Click the Interview Schedule button on the Incoming Bid Summary page.	View interview schedules.

Viewing Incoming Bids

Access the Inbox page.



	Candidate Name	Req Id	Req Line	Last Action	Rate	Amount		Date	Sent From
1	Mandy, Sarah	0000000111	1	Offer Position	75.00		USD	10/09/2003 4:46PM	Wine, Georgia
2	Mandy, Sarah	0000000110	1	Decline	75.00		USD	10/09/2003 4:46PM	Wine, Georgia
3	Mandy, Sarah	0000000101	1	Decline	75.00		USD	10/09/2003 3:56PM	Wine, Georgia
4	Mandy, Sarah	0000000100	1	Decline	75.00		USD	10/09/2003 3:55PM	Wine, Georgia
5	Mandy, Sarah	0000000099	1	Decline	48.00		USD	08/11/2003 5:20PM	Wine, Georgia
6	Mandy, Sarah	0000000099	1	Offer Position	75.00		USD	10/09/2003 3:55PM	Wine, Georgia
7	Provider, Pello	0000000096	1	Schedule Interview	50.00		USD	08/11/2003 5:17PM	Wine, Georgia
8	Provider, Peg	0000000096	1	Schedule Interview	45.00		USD	08/11/2003 5:16PM	Wine, Georgia
9	Provider, Paula	0000000095	1	Schedule Interview	42.00		USD	08/11/2003 5:15PM	Wine, Georgia
10	Nakamura, Traci	0000000095	1	Fill Requisition	50.00		USD	08/12/2003 1:52PM	Wine, Georgia

Inbox page

Req ID (requisition ID) View the requisition ID.

Req Line (requisition line) View the requisition line.

Last Action View the action of the incoming bid.

Rate View the rate of pay established for the incoming bid for a resource based requisition.

Amount View the amount established for the incoming bid for a deliverables based requisition.

Click the Create Bid button to enter a bid for the selected requisition.

Click the Bid History button to view the bids to the selected requisition.

Click the Interview Schedule button to access the Interview Schedule page.

Note. The Interview Schedule button appears on the Incoming Bid Summary page only if the service coordinator has scheduled an interview for the bid.

Click the End Communication button to automatically generate a bid response that ends the communication regarding the particular bid. Once communication has been ended, it is no longer possible to consider that bid for that requisition.

Viewing Outgoing Bids

This section discusses how to view outgoing bid information.

Pages Used to View Outgoing Bids

Page Name	Object Name	Navigation	Usage
Outgoing Bids	SPF_SUP_COM_OUT	Fulfill Job Requisitions, Maintain BidsC lick the Outgoing Bids tab.	View outgoing bids.
Bid History	SPF_BID_HISTORY	Fulfill Service Requisitions, Bid History Click the View History button on the Outgoing Bid Summary page.	View bid history.
Interview Schedule	SPF_INTERVIEW_SCHD	Click the Interview Schedule button on the Outgoing Bid Summary page.	View interview schedules.

Viewing Outgoing Bid Information

Access the Outgoing Bids page.

Click the Bid History button to view the bids to the selected requisition.

Click the Interview Schedule button to access the Interview Schedule page.

Note. The Interview Schedule button appears on the Outgoing Bid Summary page only if the service coordinator has scheduled an interview for the bid.

See Also

Chapter 5, “Implementing PeopleSoft Services Procurement Workflow,” page 87

Chapter 12, “Reviewing and Awarding Bids,” page 161

Managing Service Providers

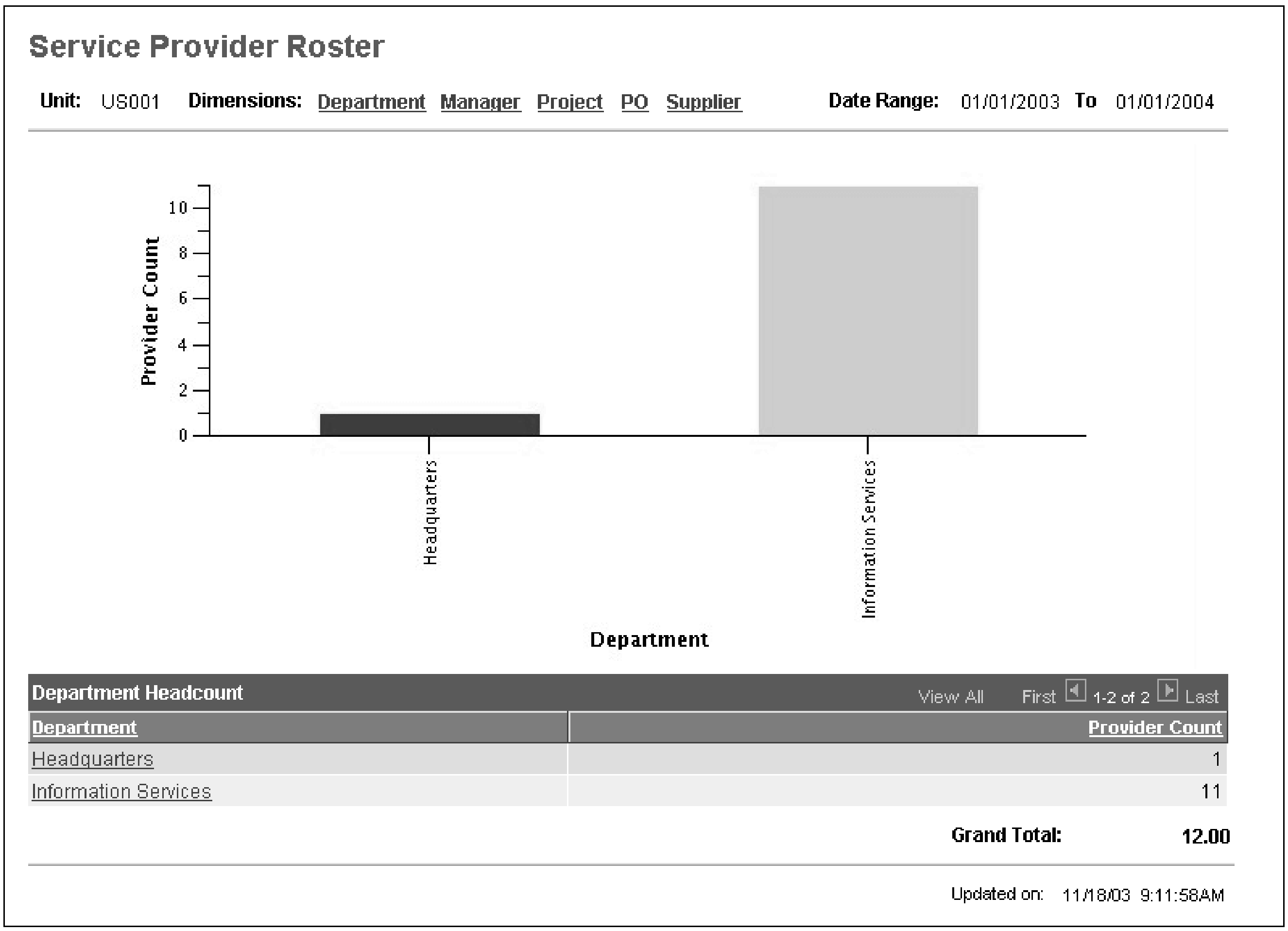
This section discusses how suppliers use the Service Provider Roster to manage service providers.

Pages Used to Manage Service Providers

Page Name	Object Name	Navigation	Usage
Service Provider Roster	SPB_PROV_ROST_PG	Fulfill Service Requisitions, Manage Service Providers	Review and update service provider information.
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.



Service Provider Roster page

Person ID Click to access the Register Service Provider page, where you can review and update service provider information.

Click to view the timesheet history for the specified service provider.

CHAPTER 12

Reviewing and Awarding Bids

This chapter provides an overview of the supplier communication process and discusses how to:

- View incoming supplier bids and create bid responses.
- View outgoing bids.
- Create and maintain interview schedules.

Understanding Supplier Communications

In PeopleSoft Services Procurement, supplier communications enable service coordinators and requesters to collaborate and communicate with suppliers to match qualified bids with open service requisitions.

PeopleSoft Services Procurement enables service coordinators and requesters to perform the following tasks:

- Review incoming 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 Incoming Bids page to view qualified bids submitted by service provider contacts.
2. Use the Incoming Bid Contact Information page to respond to supplier bids.

   Note. A successful bid selection occurs if you choose the action *Fill Requisition.* This action officially ends the bid process between you and the supplier. An email notification is automatically also sent to all bidding service provider contacts to inform them that the request has been filled by another supplier.

3. Use the Outgoing Bids 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 Events page to Analyze bid amounts and line scores for all bids submitted for your requisition request.

   You can also change your bid factor weightings on this page to perform a what-if analysis.
6. Fill the requisition from either the Analyze events page or the Bid Response page.

See Also

"Preface," page xxiii

Prerequisites

Before you can communicate with suppliers about requisitions, a supplier must submit a bid.

Viewing Incoming Supplier Bids and Creating Bid Responses

This section discusses how to:

- View incoming supplier bids.
- Create bid responses.
- Analyze events.
- Post an award.

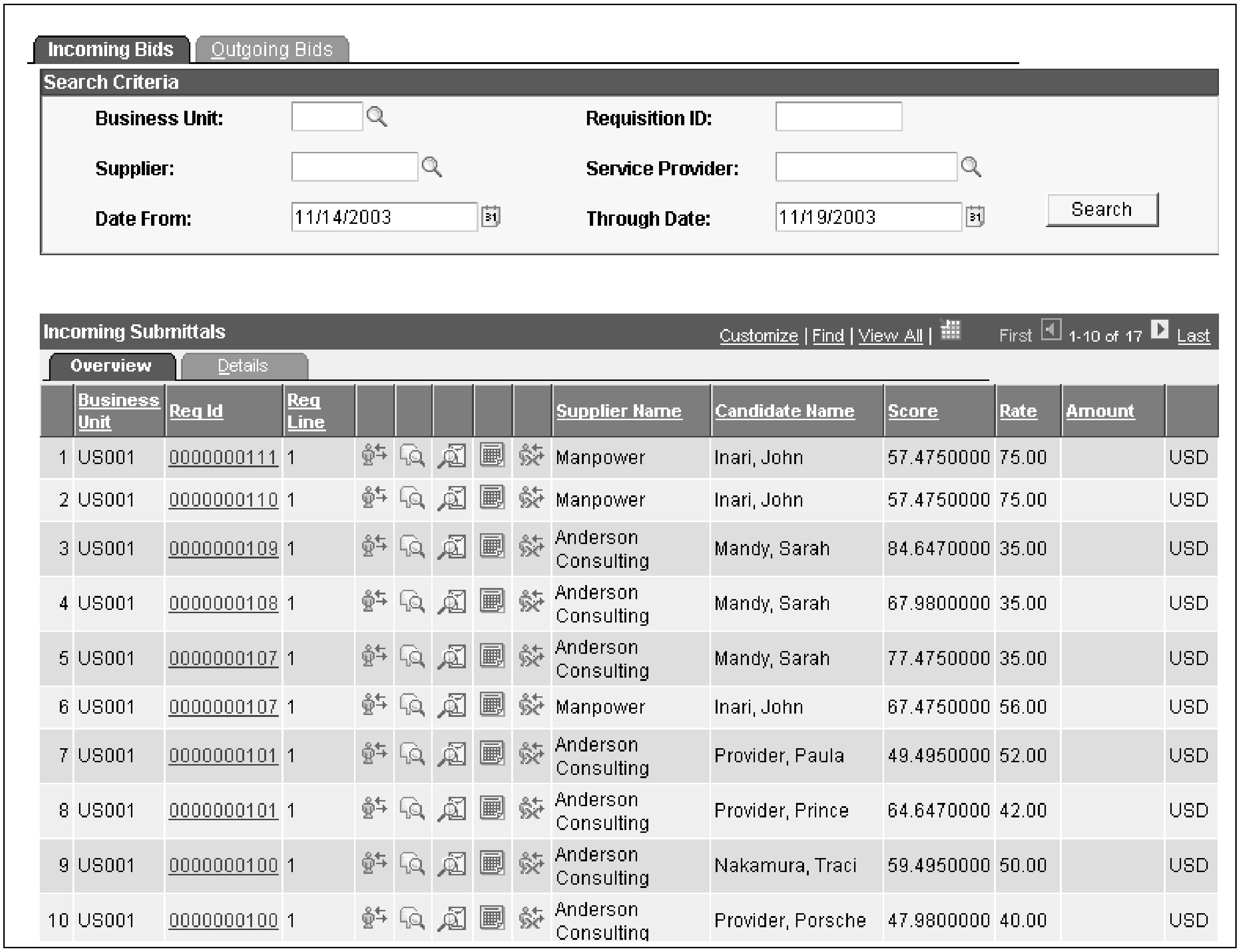
Pages Used to Review Incoming Bids and Create Bid Responses

Page Name	Object Name	Navigation	Usage
Incoming Bids (for service coordinators)	SPF_CLI_BID_IN	Services Procurement, Assess and Award Bids	View incoming bids submitted by suppliers.
Incoming Bids (for requesters)	SPF_REQ_BID_IN	Services Procurement, Review Bids	View incoming bid response details submitted by the service coordinator.
Job Summary Details	SPF_REQ_SUMMARY_PG	Click the linked requisition number or line number on the Incoming Bids page.	View job summary details.
Bid Response (for service coordinators)	SPF_CLIBID_RSP	Click the Contact button on the Incoming Bids page.	View supplier bids and submit bid responses to the supplier or forward the bid to the requester for review. (for service coordinators).
Bid Response (for requesters)	SPF_REQ_BID_RSP	Click the Contact button on the Incoming Bids page.	View supplier candidates and submit bid responses to the service coordinator (for requesters).
Currency Information	EXCH_RT_DTL_INQ	Click the Rate Detail link on the Incoming Bid Contact Information page.	View multicurrency information.

Page Name	Object Name	Navigation	Usage
Analyze Events (for service coordinator)	AUC_AWARD_LN_PG	 Click the Bid Analysis button on the Incoming Bids page.	Analyze bid amounts and line scores for all supplier bids that respond to your requisition request.
Analyze Events - Award Details (for service coordinators	AUC_AWARD_DTL_PG	Select which bid to award and click the Award Details link on the Analyze Events page.	View the details of your events.
Vendor Information (for service coordinators	AUC_AWARD_VNDR	Click the Bidder Name link associated with an event to view.	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.
Bid History	SPF_CLIBID_HIS	Click the Bid History button on the Incoming Bids page.	View the history for your bid responses.
Interview Schedule	SPF_INTERVIEW_SCHD	Click the Interview Schedule button on the Incoming Bids page.	Create and update an interview schedule for a candidate.
Interview Schedule Details	SPF_INTERVIEW_DTL	Click the Evaluate Candidate button on the Interview Schedule page.	View the details for your interview schedule and rate the candidate.

Viewing Bid Responses

Access the Incoming Bids page.



Incoming Bids | Outgoing Bids

Search Criteria

Business Unit:		Requisition ID:	
Supplier:		Service Provider:	
Date From:	11/14/2003	Through Date:	11/19/2003

Search

Incoming Submittals Customize | Find | View All | First 1-10 of 17 Last

Overview | Details

	Business Unit	Req Id	Req Line						Supplier Name	Candidate Name	Score	Rate	Amount	
1	US001	0000000111	1						Manpower	Inari, John	57.4750000	75.00		USD
2	US001	0000000110	1						Manpower	Inari, John	57.4750000	75.00		USD
3	US001	0000000109	1						Anderson Consulting	Mandy, Sarah	84.6470000	35.00		USD
4	US001	0000000108	1						Anderson Consulting	Mandy, Sarah	67.9800000	35.00		USD
5	US001	0000000107	1						Anderson Consulting	Mandy, Sarah	77.4750000	35.00		USD
6	US001	0000000107	1						Manpower	Inari, John	67.4750000	56.00		USD
7	US001	0000000101	1						Anderson Consulting	Provider, Paula	49.4950000	52.00		USD
8	US001	0000000101	1						Anderson Consulting	Provider, Prince	64.6470000	42.00		USD
9	US001	0000000100	1						Anderson Consulting	Nakamura, Traci	59.4950000	50.00		USD
10	US001	0000000100	1						Anderson Consulting	Provider, Porsche	47.9800000	40.00		USD

Incoming Bids page

Req ID (requisition ID) Click the 10-digit requisition ID to view the details of the requisition.

Req Line (requisition line) Displays the requisition line number.

 Click to view the Bid Response page and to respond to the supplier or requester.

 Click to view the Bid Analysis page to compare competing bids.

 Click to view the Bid History page.

 Click to view the Interview Schedule page.

 Click to automatically generate a bid response that end the communication regarding the particular bid. Once communication has been ended, it is no longer possible to consider that bid for a requisition.

Candidate Name Displays the service provider submitted by the supplier.

Note. The candidate name is blank for bids on deliverables based requisitions.

Score Displays the bid factor score associated with the bid responses.

Amount Displays amount in requisition currency for deliverables based requisitions.

Note. The amount is blank for resource based requisitions.

Rate Displays rate in requisition currency for resource based requisitions.

Note. The rate is blank for deliverables based requisitions.

Supplier Name Displays the name of the supplier bidding on the requisition.

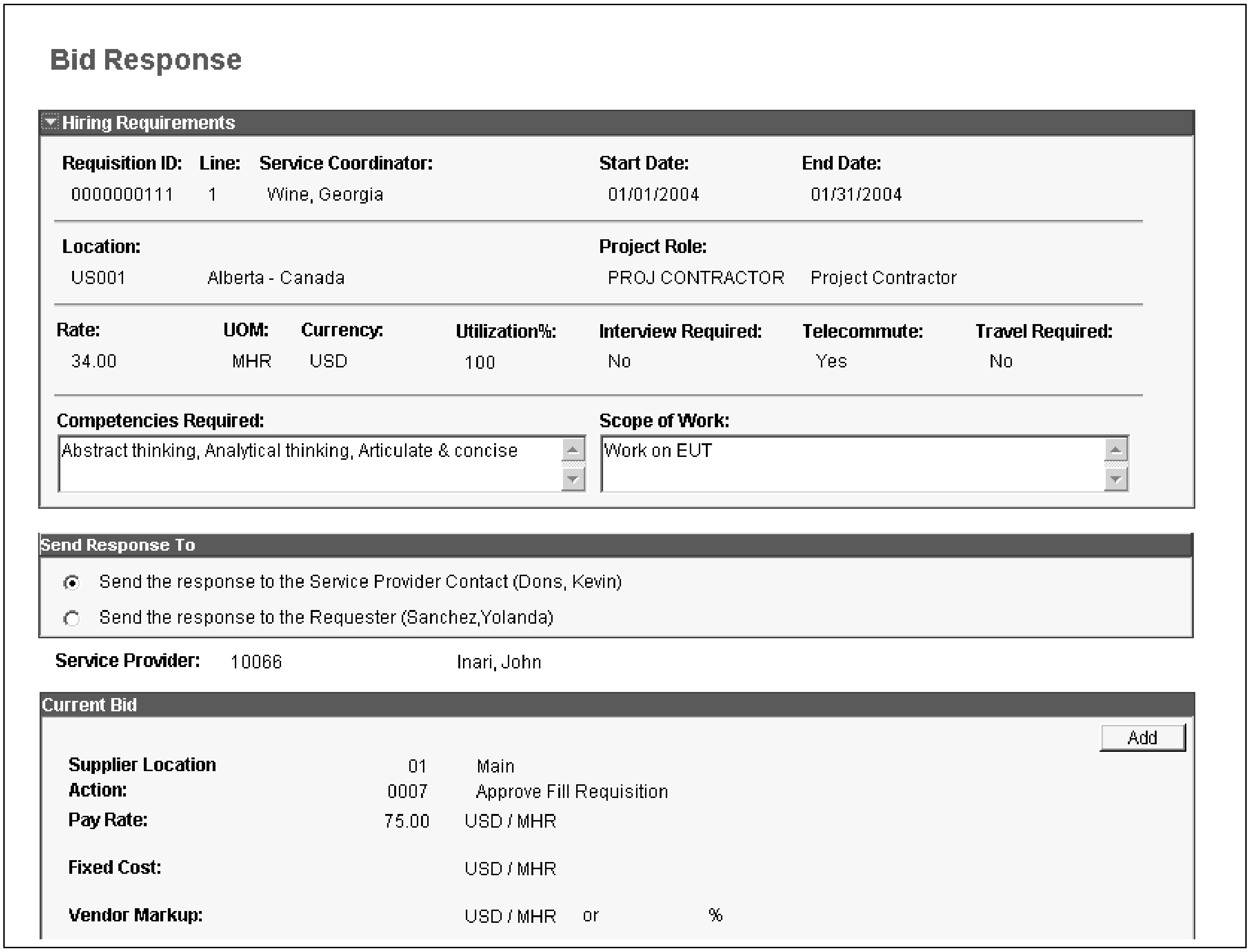
Last Action Review the last actions submitted by the supplier.

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.



Bid Response

Hiring Requirements

Requisition ID:	Line:	Service Coordinator:	Start Date:	End Date:
0000000111	1	Wine, Georgia	01/01/2004	01/31/2004

Location:		Project Role:	
US001	Alberta - Canada	PROJ CONTRACTOR	Project Contractor

Rate:	UOM:	Currency:	Utilization%:	Interview Required:	Telecommute:	Travel Required:
34.00	MHR	USD	100	No	Yes	No

Competencies Required: Abstract thinking, Analytical thinking, Articulate & concise

Scope of Work: Work on EUT

Send Response To

- (selected) Send the response to the Service Provider Contact (Dons, Kevin)
- Send the response to the Requester (Sanchez,Yolanda)

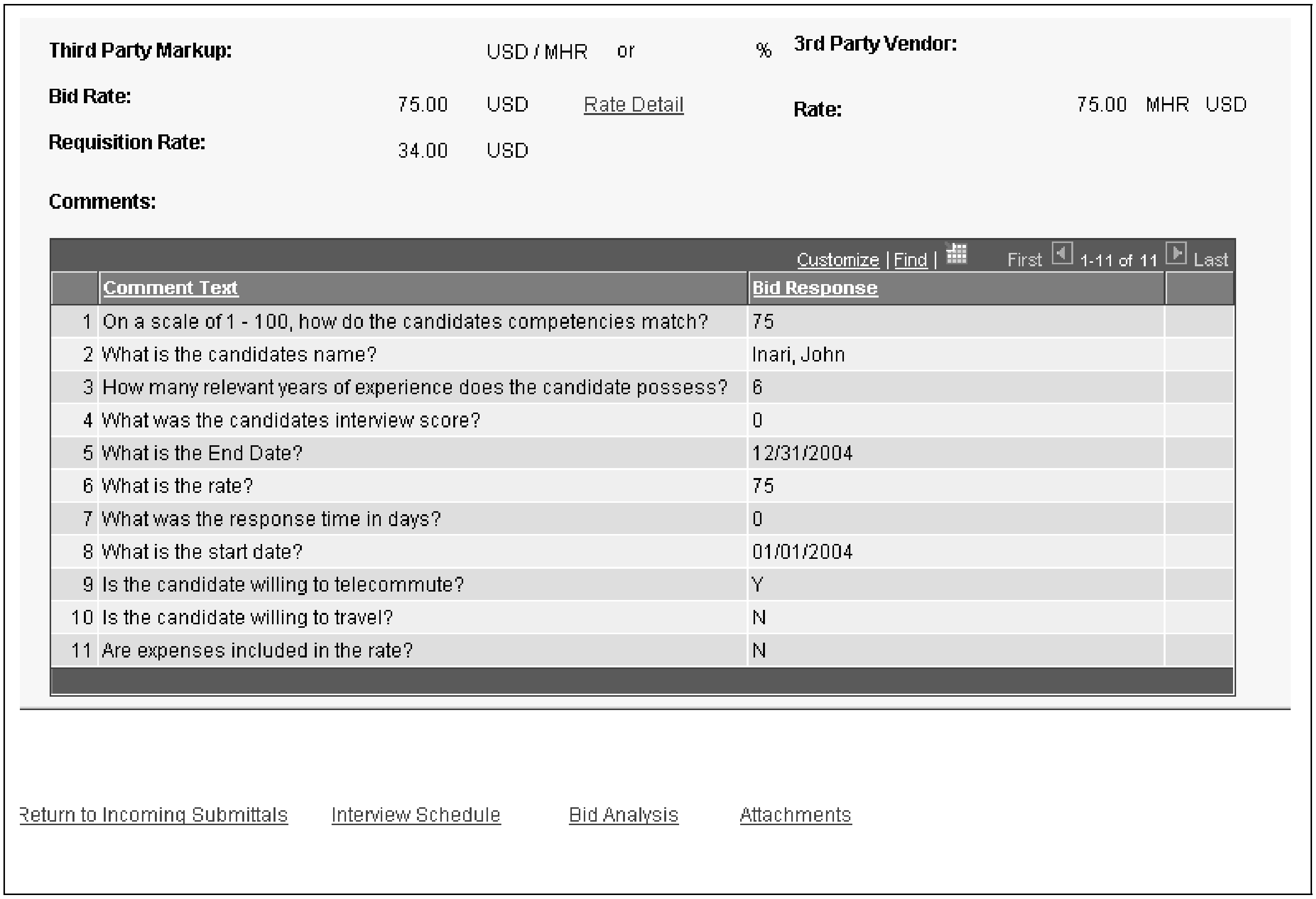
Service Provider: 10066 Inari, John

Current Bid

Add

Supplier Location	01	Main
Action:	0007	Approve Fill Requisition
Pay Rate:	75.00	USD / MHR
Fixed Cost:		USD / MHR
Vendor Markup:		USD / MHR or %

Bid Response (page 1 of 2)



Third Party Markup: USD / MHR or % 3rd Party Vendor:

Bid Rate: 75.00 USD Rate Detail Rate: 75.00 MHR USD

Requisition Rate: 34.00 USD

Comments:

Customize | Find | First 1-11 of 11 Last

	Comment Text	Bid Response	
1	On a scale of 1 - 100, how do the candidates competencies match?	75	
2	What is the candidates name?	Inari, John	
3	How many relevant years of experience does the candidate possess?	6	
4	What was the candidates interview score?	0	
5	What is the End Date?	12/31/2004	
6	What is the rate?	75	
7	What was the response time in days?	0	
8	What is the start date?	01/01/2004	
9	Is the candidate willing to telecommute?	Y	
10	Is the candidate willing to travel?	N	
11	Are expenses included in the rate?	N	

Return to Incoming Submittals Interview Schedule Bid Analysis Attachments

Bid Response (page 2 of 2)

Send Response To

Select the appropriate radio button in this group box to send communications to the requester who originally submitted the requisition or to the service provider 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 only select bid actions that are specific to their communications. Additional bid actions that are intended for the service provider contact are filtered out.

Current Bid

Click the Add button to enter your new bid action response.

Action

Select an action from the available options and optionally respond to suppliers with comments. Options include:

- *Schedule Interview*
- *Offer Position*
- *Fill Requisition*

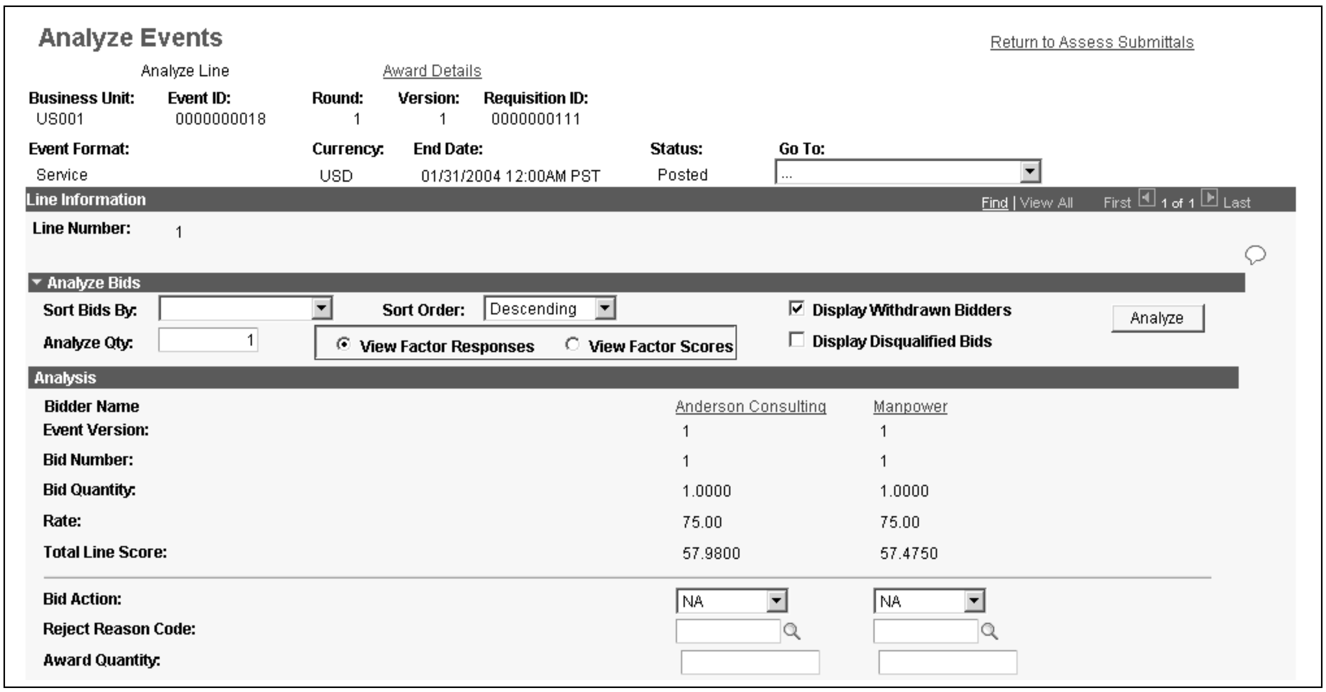
- *Reply*
- *Decline*
- *End Communication*

Note. Once you choose the action *End Communication,* the bid process between the service coordinator and the supplier officially ends.

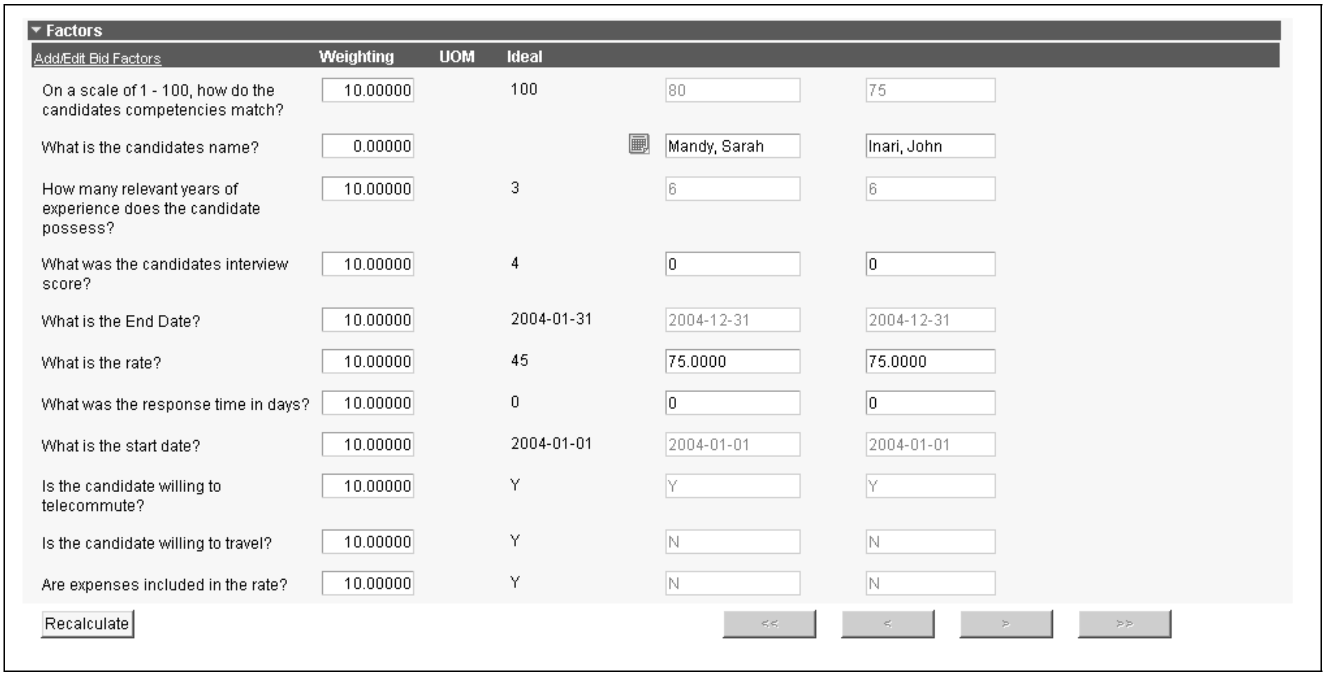
Note. To fill the requisition, click the *Fill Requisition* action. This sends a worklist entry to the requestor notifying him that a work order needs to be generated. The worklist may also go to the service coordinator is his defaults specify he can create work orders.

Analyzing Events

Access the Analyze Events page.



Analyze Events page (1 of 2)



Factors

Add/Edit Bid Factors	Weighting	UOM	Ideal		
On a scale of 1 - 100, how do the candidates competencies match?	10.00000		100	80	75
What is the candidates name?	0.00000			Mandy, Sarah	Inari, John
How many relevant years of experience does the candidate possess?	10.00000		3	6	6
What was the candidates interview score?	10.00000		4	0	0
What is the End Date?	10.00000		2004-01-31	2004-12-31	2004-12-31
What is the rate?	10.00000		45	75.0000	75.0000
What was the response time in days?	10.00000		0	0	0
What is the start date?	10.00000		2004-01-01	2004-01-01	2004-01-01
Is the candidate willing to telecommute?	10.00000		Y	Y	Y
Is the candidate willing to travel?	10.00000		Y	N	N
Are expenses included in the rate?	10.00000		Y	N	N

Recalculate

Analyze Events page (2 of 2)

Award Event

To award an event to a bidder, select *Award* from the dropdown list under the bidder's name. You can only award the event to one bidder.

Posting an Award

Access the Events Details 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. Once you post the award, the line details appear on screen.

Viewing Outgoing Bids

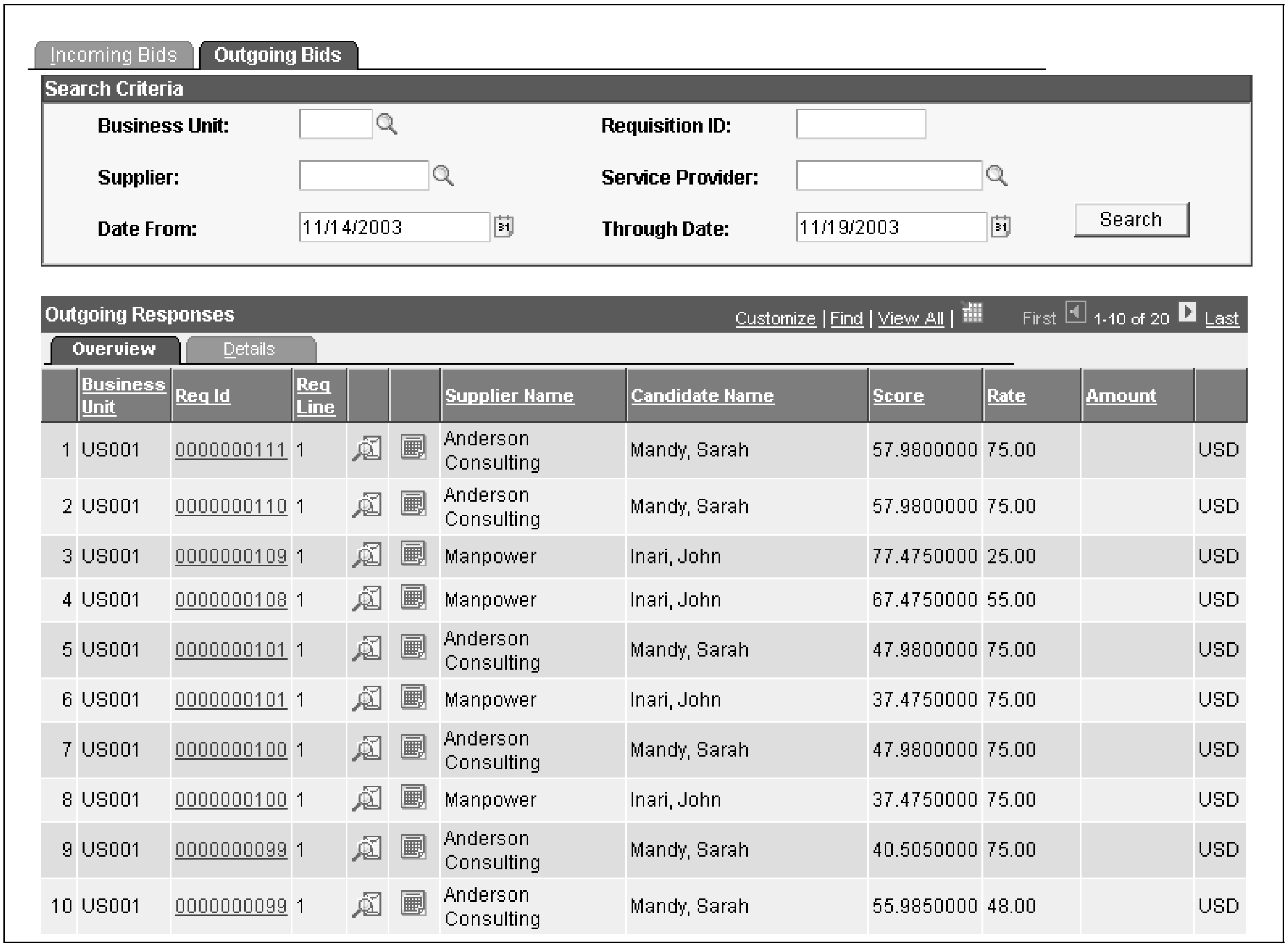
This section discusses how to view outgoing bid summary.

Pages Used to View Outgoing Bids

Page Name	Object Name	Navigation	Usage
Outgoing Bids (for service coordinators)	SPF_CLI_BID_OUT	Services Procurement, Requisition Fulfillment, Assess and Award Bids. Select the Outgoing Bids page.	View outgoing bids.
Outgoing Bids (for requesters)	SPF_REQ_BID_OUT	Services Procurement, Requisition Fulfillment, Review Bids. Select the Outgoings Bid page.	View outgoing bids sent to the service coordinator.
Bid History	SPF_CLIBID_HIS	 Click the Bid History button on the Outgoing Bid Summary page.	View bid history.
Interview Schedule	SPF_INTERVIEW_SCHD	 Click the Interview Schedule button on the Outgoing Bids page.	Create and update an interview schedule for a candidate.
Interview Schedule Details	SPF_INTERVIEW_DTL	Click the Details button on the Interview Schedule page.	View interview schedule details.

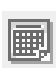
Viewing Outgoing Bids

Access the Outgoing Bids page.



Outgoing Bids page

Click to view the Bid History page.



Click to view the Interview Schedule page.

See Also

Chapter 5, "Implementing PeopleSoft Services Procurement Workflow," page 87

Creating and Maintaining Interview Schedules

This section discusses how to:

- Create an interview schedule.
- Rate an interview.

Understanding the Interview Process

Here is an overview of the interview process:

1. Access the Interview Schedule page (Service Coordinator and Requestor)

   Enter the required values such as the interview date, time, and interviewer.

   Note. Once you schedule a candidate interview, the interview schedule details appear for the supplier.

   Note. The interviewer has the requestor or approver role.

2. Access the Interview Schedule Details page (Service Coordinator, Requestor and Interviewers

   Use this page to rate the candidate interview. Once the interview is complete, select the Interview Complete check box. The service coordinator can also select the Send Email Notification check box to notify interviewers and the service provider contact of the interview schedule information.

   Note. Only the service coordinator and the requestor can access the Send Email Notification check box.

3. Save the page.

If *Use Ratings* is enabled on the business unit, Upon completing the interview, the interviewer rates the candidate using the star rating system. Once 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 the strategic sourcing bid factor tables, and it is used to calculate the candidate's overall score.

Note. The calculation of scores only happens if the interview bid factor is associated with this requisition. 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 candidates overall score.

Pages Used to Create and Maintain Interview Schedules

Page Name	Object Name	Navigation	Usage
Interview Schedule	SPF_INTERVIEW_SCHD	Click the Interview Schedule button on the Outgoing Bids page.	Create and update an interview schedule for a candidate.
Interview Schedule (for requesters)	SPF_MY_INTRVW_SCHD	Services Procurement, Requisition Fulfillment, View Scheduled Interviews	View interviews that are scheduled for a particular requester.
Interview Schedule Details	SPF_INTERVIEW_DTL	Click the Evaluate button on the Interview Schedule page.	Rate the candidate interview
Job Summary Details	SPF_REQ_SUMMARY_PG	Click the linked requisition number or line number on the Incoming Bids page.	View job summary details.

Creating an Interview Schedule

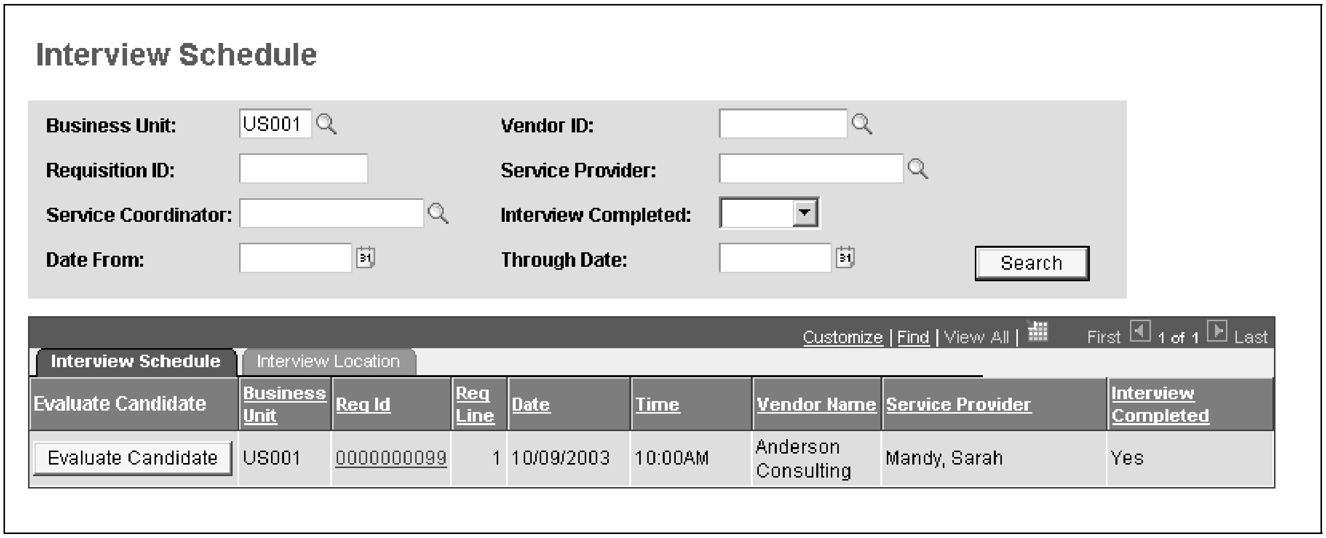
Access the Interview Schedule page.

Enter the details of the interview schedule, including date, time, and interviewer.

Note. You cannot update an interview schedule after you choose the action Fulfill Requisition, Position No Longer Available, Offer Accepted, Confirm Offer Acceptance, or No Longer Available.

Viewing Interview Schedules

Access the Interview Schedule (for requesters) page.

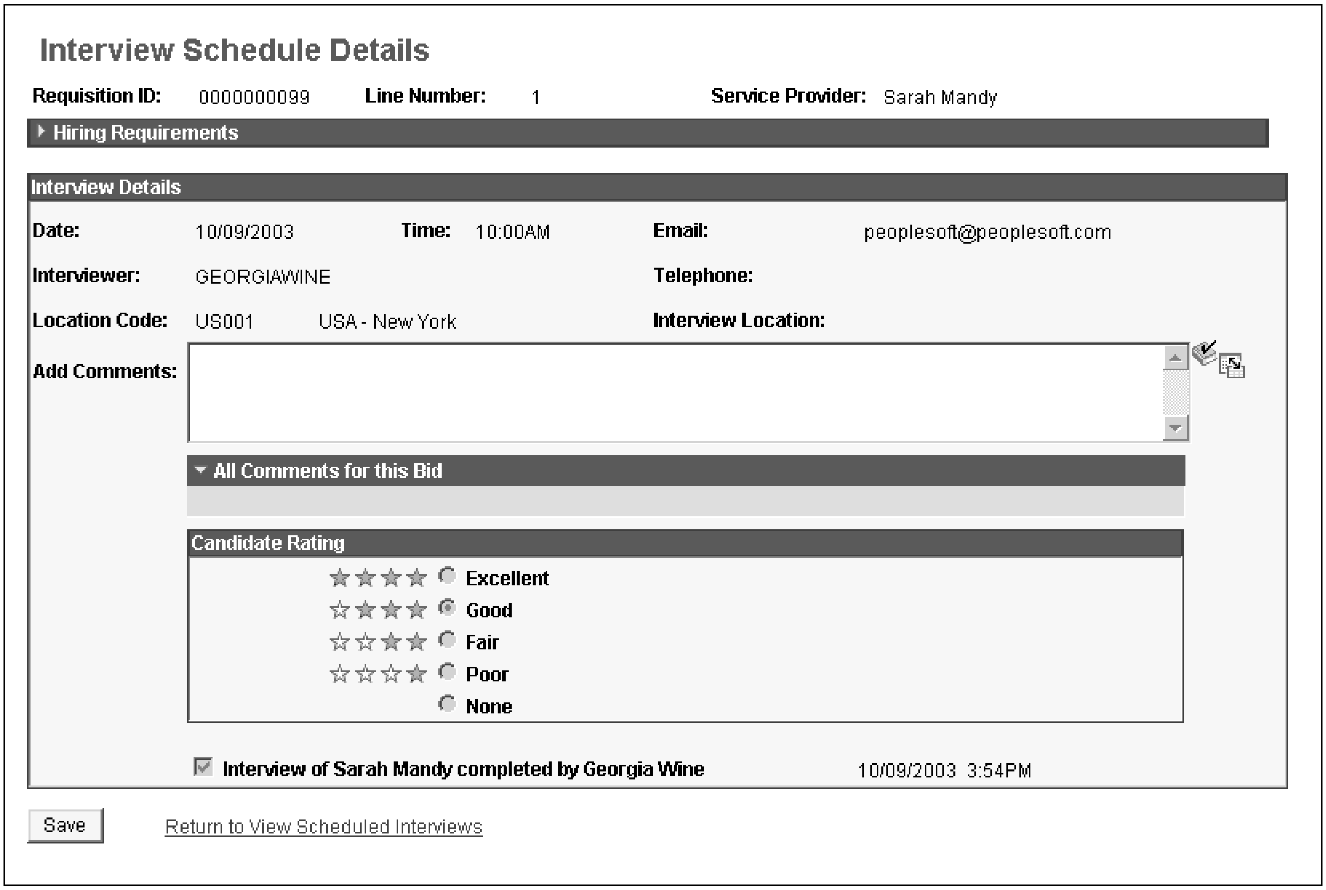


Interview Schedule page

Requesters can view the service providers scheduled for interviews.

Evaluating the Interview

Access the Interview Schedule Details page.



Interview Schedule Details page

Candidate Rating Select a candidate rating; values include Excellent, Good, Fair, Poor,and None.

Interview Completed Click to indicate that the interview was completed.

CHAPTER 13

Managing Work Orders

This chapter provides an overview of the services work order process and discusses how to:

- Create and maintain work orders.
- Create purchase orders with the Quick Sourcer.
- Manage services work orders.
- View logistical tasks.

Understanding Services Work Orders

This section lists prerequisites and discusses:

- Work order status.
- Access to work orders.

In PeopleSoft Services Procurement, work orders enable you to create resource-based and deliverable-based work orders that specify the basic terms and conditions of a project. *Resource-based work orders* reflect work that is typically 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. Deliverable-based work orders are logged against an entire project, not just the hours worked by a single service provider. There is no specific service provider in mind for deliverable-based work orders, so a statement of work defines the requirements. The rate and the unit of measurement (UOM) are not applicable for deliverables based work orders so the user enters a work order amount instead of rate information.

After a service requisition is created, sourced, and filled, you use work orders to document explicit terms agreed upon by you and the service provider. The service provider logs time and progress against the work order.

With work orders in PeopleSoft Services Procurement, you can:

- Generate work orders from filled requisitions.
- Link work orders to approved or sourced requisitions.
- Create resource based or deliverables based work orders without requisitions.
- View tax information.
- View and execute the logistical tasks.
- Route the work order for approval using defined workflow rules.
- Reassign the work order to another service provider for the same project.

- Extend the duration of the work order and track the related rate changes and approvals for the extension.
- Adjust the rate on the work order using effective dates.
- Link work orders to purchase orders using the Quick Source process.
- Control expenditures to ensure that the work order does not exceed the agreed amount.
- Notify a service provider that work can begin.

Note. If you have already selected a service provider, and if your work order does not require approval, you can create a work order without creating a requisition

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Note. If the filled requisition is pre-approved and the amount is equal to or less than the original approval, no additional approval is required to create the work order. If the pre-approved amount is less than the filled requisition amount, the requisition is routed to the authorized approver for post-approval. Any rejected requisitions are routed to the requester for update or correction.

See Also

“Preface,” page xxiii

Chapter 14, “Managing Time and Expense,” page 207

Chapter 13, “Managing Work Orders,” Viewing Logistical Tasks, page 204

Work Order Status

Throughout the work order process, requisitions pass 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 by the final approver.
- *Released*: The linked purchase order has been dispatched. Time or progress can be logged against the work order.
- *Cancelled*: The requester or approver cancels the work order.
- *Closed*: The work order is closed.
- *Denied*: The work order is denied for approval.

Once the work order is closed, a service provider can no longer log time and expenses against it.

Access to Work Orders

Throughout the work order process, specific role types have access to work order functionality. The following table lists the various role types that have access to work orders.

Role Type	Access
Requester	This person has complete access to work order functions.
Service Coordinator	As set up on the Service Coordinator defaults page, can enter work order, extend work order, or delegate requisition sourcing.
Logistical Task Assigned To	This person can only view assigned logistical tasks associated with the work order.
Work Order Approver (dynamically assigned based on workflow rules)	This person has access to change the work order approval details only.

VAT and SUT on Services

Value Added Tax (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, and 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. The main difference between VAT and Sales and Use Tax is that almost everyone pays VAT and recovers the VAT they paid except the end consumer, whereas only the end consumer pays Sales and Use Tax, while everyone in the middle of the supply chain is exempt from Sales and Use Tax.

Sales and Use Tax (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 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/or 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/SUT codes and percentages as a default from PeopleSoft Purchasing purchase order onto the PeopleSoft Services Procurement work order upon work order release.

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 requirements must be filled (if they are linked to the work order).
- A supplier network must be defined for the business unit.
- Projects and activities must be defined.
- Service types and services/roles 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 Maintaining Work Orders

This section discusses how to create and maintain 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 create a service work order.
2. 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. 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 resource-based work order that is tied to a requisition, many field values (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 Requisition ID, Line Number, and Invoice and Time Approval fields. If the work order is deliverable-based, enter data in the Progress Log Approver and Progress Log Template fields.
5. Save the page.
6. Click the View Task List link on the Maintain Services Work Order page to make sure that all mandatory pre-approval logistical tasks are complete.
7. After all mandatory pre-approval logistical task are complete, click the *Submit* button on the Maintain Services Work Order page. Upon submittal the work order submittal page will display approval information and the work order status will change to *Submitted* or *Approved* if the work order creator has sufficient authority to approve work orders.

8. Once 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 and it depends 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 5, "Implementing PeopleSoft Services Procurement Workflow," Using the Work Order Approval Workflow, page 94.

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 post-approval logistical tasks are complete.

    You must complete all post-approval tasks before releasing the work order.

    Click Process Purchase Order button on the Maintain Services Work Order page to complete purchase order distribution and accounting information.

11. If purchase orders are integrated with work orders, click the Quick Source link on the Cost tab to automatically build the purchase order.

    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 on the icon next to the created purchase order id to verify that the purchase order has been approved, budget checked, doc tolerance and dispatched. Use the purchase order page to perform these actions.

13. Once the purchase order has been dispatched, you can release the work order by clicking on the *Release* button.

page Used to Create and Maintain Work Orders

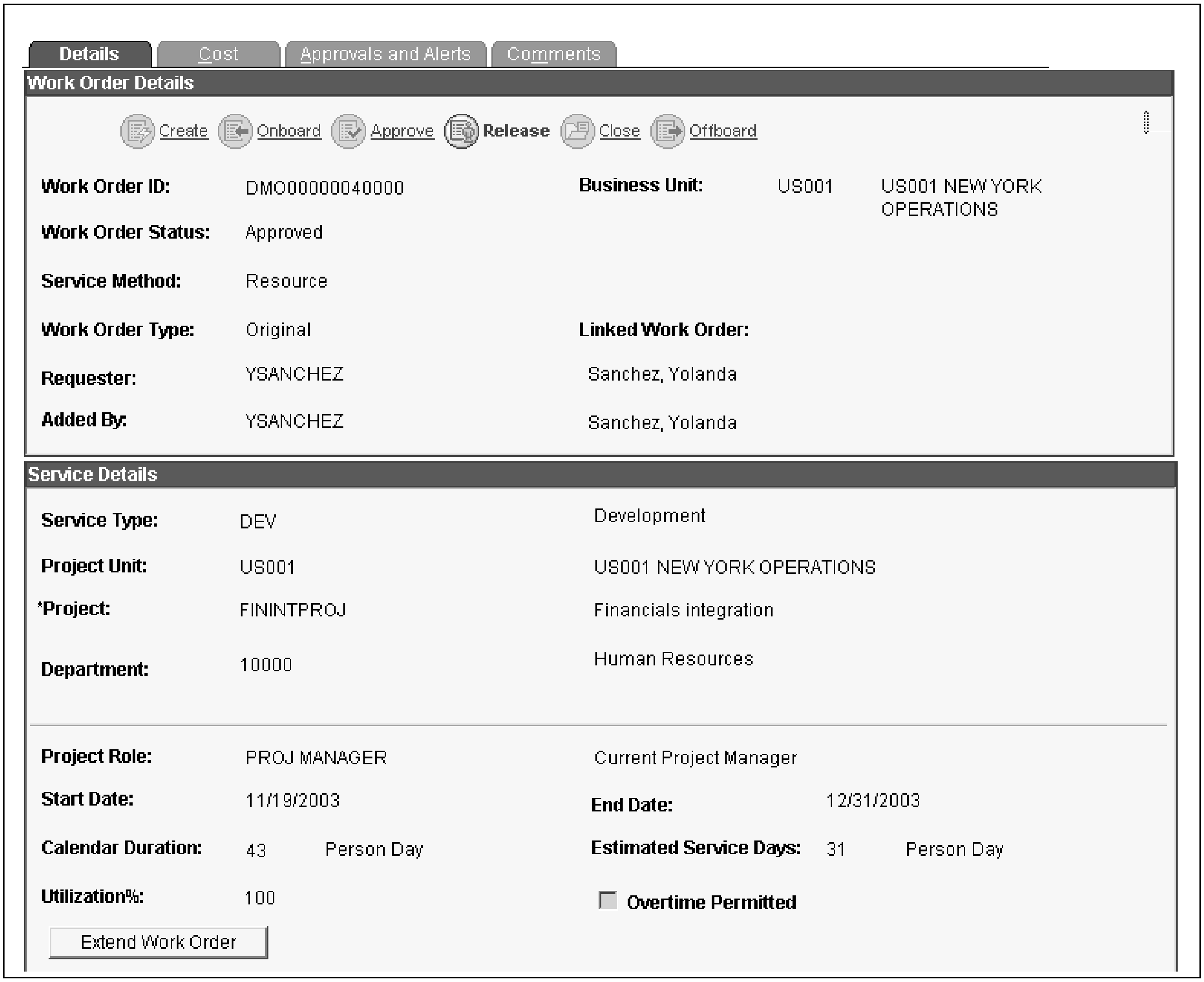
Page Name	Object Name	Navigation	Usage
Services Work Order List	SPF_WORDER_ROSTER	Services Procurement, Requisition Fulfillment, Manage Services Work Orders	Add and maintain work orders.
Work Order - Details	SPF_WO_REQ_VEN_DT	Services Procurement, Requisition Fulfillment, Manage Services Work Orders Click the Add Work Order button on the Manage Services Work Order page and select the Details tab.	Enter work order detail information.

Page Name	Object Name	Navigation	Usage
Work Order - Cost	SPF_WO_COST_PO_PG	Services Procurement, Requisition Fulfillment, Manage Services Work Orders Click the Add Work Order button on the Manage Services Work Order page. Click the Cost tab.	Enter cost information for the work order.
Work Order Rates	SPF_WO_PAYRATE	Click the Enter Effective Dated Rate button on the Work Order - Cost page.	Update the work order rate by effective date (optional).
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 Taxbutton on the Work Order - Cost page.	View sales and use tax information. **Note.** Sales and Use tax information can be edited if purchase orders are not integrated with work orders.
Work Order - Approvals and Alerts	SPF_WO_APPROVER	Services Procurement, Requisition Fulfillment, Manage Services Work Orders Click the Add Work Order button on the Manage Services Work Order page. Click the Approvals and Alerts tab.	Enter approval information related to work orders.
Work Order - Comments	SPF_WO_COMMENTS	Services Procurement, Requisition Fulfillment, Manage Services Work Orders Click the Add Work Order button on the Manage Services Work Order page. Click the Comments tab.	Enter comments related to work orders.
Service Work Order History	SPF_WO_HISTORY	Click the Work Order History link on the Maintain Services Work Order page.	View status and approval changes.
Service Work Order Template History	SPF_WO_TE_TEMPLATE	Click the History button on the Maintain Services Work Order page.	View templates that were linked to the work order.

Page Name	Object Name	Navigation	Usage
Document Attachment	SPF_ATTACHMENT	Click the Statement of Work link on the Maintain Services Work Order page.	Upload file attachments for a work order.
Distribution Information	SPF_WO_PO_DISTRIB	Click the PO Chart link on the Maintain Services Work Order page.	View purchase order distribution details.
Quick Source	PV_RUN_REQSORC_1	Click the Quick Source link on the Maintain Services Work Order page.	Execute 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 icon on the Maintain Services Work Order page.	Navigate to 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.

Creating and Maintaining Work Orders

Access the Work Order - Details page.



Work Order - Details page (1 of 2)

Vendor ID:	USA0000037	Anderson Consulting
Vendor Location:	01	Main
PO Currency:	USD	
Location:	US001	USA - New York
Service Provider:	10060	Mandy, Sarah
Title:	PM	

Statement of Work

Service Work Order List Work Order History Task Check List

Release

Save

Details | Cost | Approvals and Alerts | Comments

Work Order- Details page (2 of 2)

Work Order Details

Work Order ID

Displays the unique work order ID that is created when you link a new work order.

Work Order Status

Displays the status of the work order. Work orders have one of the following values: *Open*, *Submitted*, *Approved*, *Released*, *Cancelled*, *Closed*, or *Denied.*

Service Method

Displays the service method of *Service Based* 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 types have one of the following values: *Original*, *Extension*, or *Reassigned*.

Note. Work order types determine the logistical task group and logistical tasks that are associated with the work order. Pre-approval and post-approval 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 or reassigning the existing work order. When you extend or reassign an existing work order, information from the original work order defaults onto the new work order.

Service Details

Requisition ID (Optional) Enter the requisition ID associated with the service work order. The requisition line must have a status of *Approved* or *Sourced.*

Note. You can generate a work order from a filled requisitions by clicking on the Work Order button on the requisition details 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.

Service Type Displays the service type selected on the Add New Work Order group box.

Project Unit Select the services project business unit associated with the work order. The project business unit defaults from the requester or service coordinator defaults.

Project Select the services project associated with the work order. The project defaults from the requester or service coordinator defaults.

Department Select the department that generates the work order. The department defaults from the user's procurement preferences.

Project Role/Services Select the specific role to be performed; for example, Program Manager or Java Developer. The project role/services are linked to the service type on the roles/services by service type page.

Note. If the work order is resource based, the system displays Project Role. If it is deliverables based, the system displays Services.

Start Date and End Date Enter the dates on which the work order begins and ends. The start and end dates default from the project start and dates. If the project start date is in the past, the work order start date defaults to the current system date.

Vendor ID Enter the vendor ID.

Vendor Location Enter the vendor location. If only one location exists for the vendor, it will automatically default onto the work order.

PO Currency Displays the currency associated with the Purchase Order, the vendor location currency. If the vendor location has a currency set to *Default*, the system will use the Purchasing Business unit currency as the PO currency.

Location Enter the ship to location for the work order. The ship to location defaults from the requester defaults.

Title Enter job title for the work order.

Resource Based Information

Calendar Duration Displays the number of calendar days from work order start date to end date.

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 will be recalculated.

Utilization %

Enter the percentage of time that the candidate spends in a workday. For example, if the candidate typically works a half-day, the utilization would reflect 50%. The default value is 100%.

Overtime Permitted

Select the check box if overtime is allowed for the work order. The value defaults in from the default time template specified on the project.

Note. If the user has the role action *SP_ENFORCE_PROJ_ATTR*, the user must adhere to the overtime and expense settings on the default time template.

Deliverables Based Information

Settlement Options

Select to determine how services are settled, based on progress log entries. Your options include:

- *Fixed Amount:* payments are made against milestone activities where the supplier enters the amount to be paid on the progress logs. The milestone activities can be logged multiple times for the same work order.
- *Milestone:* payments are made when agreed upon milestones are met. For example, you could agree to pay your construction company 25% of the total fee when the foundation is complete. The supplier can only log each milestone activity once.
- *Percentage:* payments are made based on the progress log entry for percentage of the total work order amount.
- *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.

Links and buttons (Links change based on Status of work order)

Service Work Order List link

Click to access the Services Work Order Roster page.

Work Order History

Click to tracks status and approval changes.

View Task List link

Click to view logistical tasks that are associated with the work order.

Statement of Work link

Click to access the Document Attachment page, where you can attach files associated with previously created work orders.

PO Chart Link

Click to access the Distribution page, where you can maintain distribution accounting information. The Merchandise Amount is derived from the work order PO Amount in the work order distribution line.

Note. This option only appears if a work order is not associated with a requisition. If the work order is linked to a requisition, use the manage requisitions page to access PO distribution information.

Process PO

Click to populate the purchase order staging tables.

Note. This button appear s 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.

Assign New Resources

Click to assign a different service provider for this work order. This button appears for resource-based work orders only.

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-based work orders only.

Decline

Click this button to decline the candidate.

Note. If you decline the candidate, and if the work order is associated with a requisition, the requisition returns to the original status that it held before the work order was created. Once declined, you can reuse the requisition for another work order.

Submit

Click to submit the work order for approval.

Note. If the pre-approval logistical tasks aren't complete, an error message appears and the status is not changed to *Submitted.*

Purchase Order

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 pre-approval logistical tasks aren't complete, an error message appears and the status is not changed to *Submitted.*

Release

Click to release the work order. Once the work order is released, the supplier is notified that they can begin to log time or progress logs.

Note. If the post-approval logistical tasks aren't complete, an error message appears and the status is not changed to *Released.*

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, the requisition returns to the original status that it held before the work order was created. Once canceled, you can reuse the requisition for another work order.

See Also

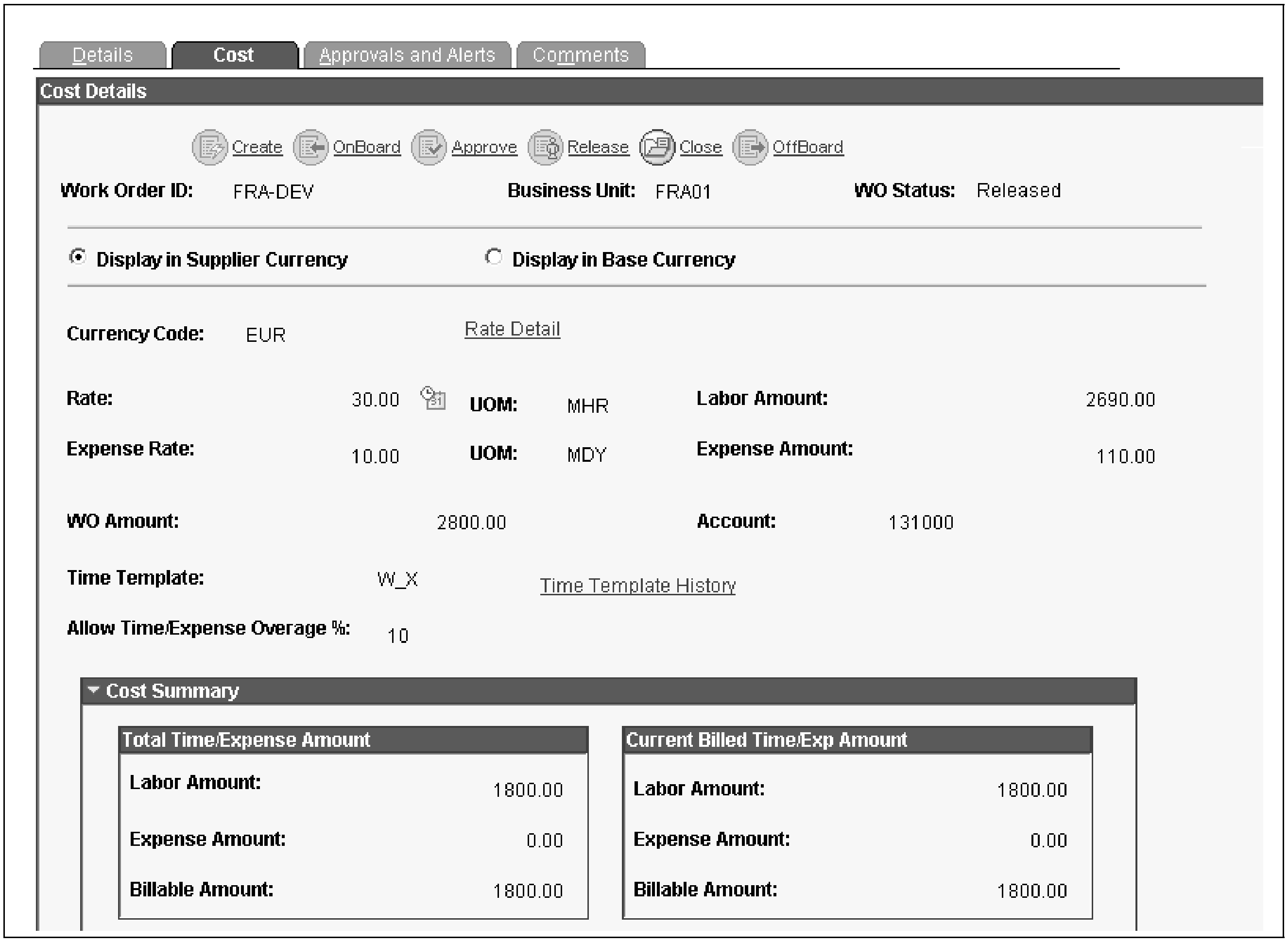
Chapter 15, "Managing Progress Logs," page 229

Chapter 3, "Implementing Your PeopleSoft Services Procurement System," page 21

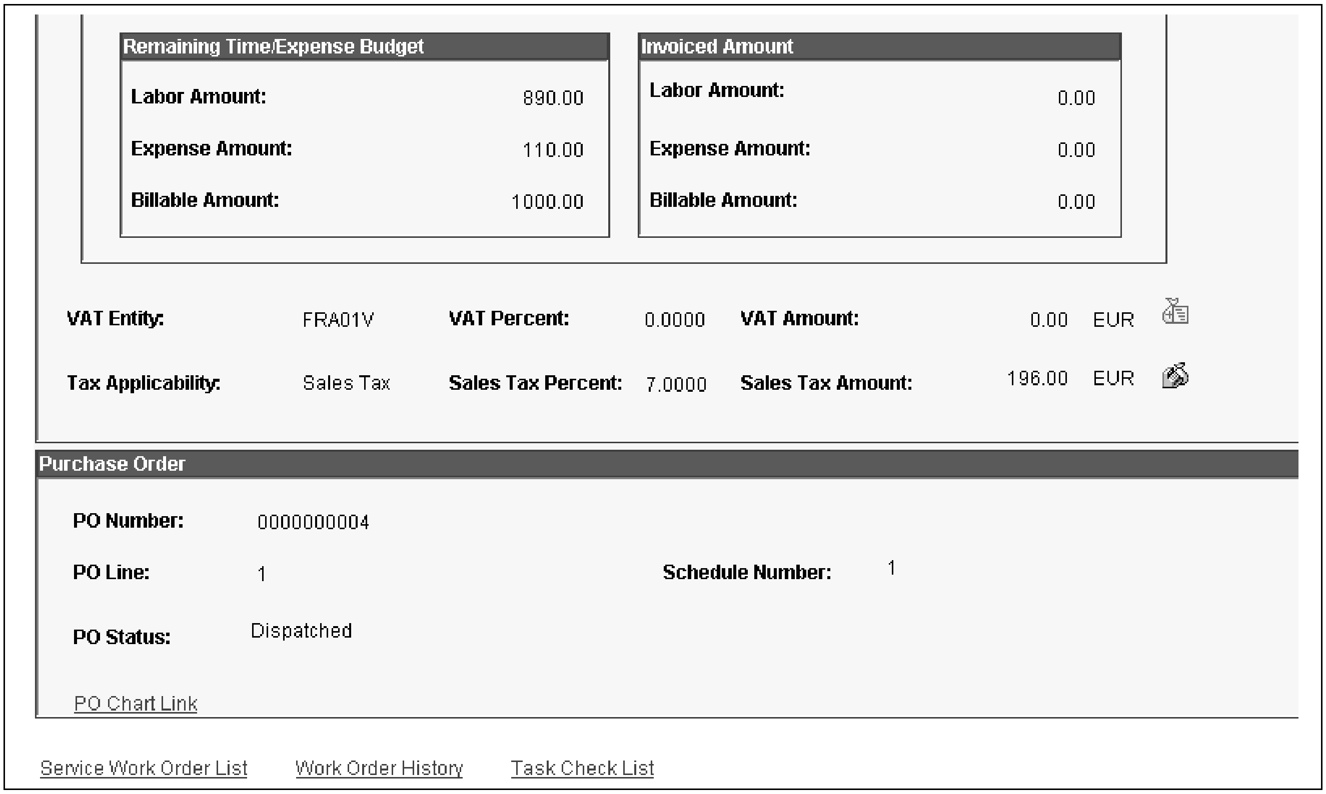
Chapter 16, "Managing Settlements," page 237

Work Order Cost Information

Access the Work Order - Cost Details page.



Work Order - Cost Details page (page 1 of 2)



Work Order - Cost Details page (page 2 of 2)

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.

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, we may have two entries in the effective dated rate. The first entry is for the requisition rate and the second rate is the filled rate. This allows you to compare the two rates.

Note. If the rate is increased, the work order amount will be consumed at a quicker rate. An extension may need to be created.

Display in Supplier Currency/Display in Base Currency

Toggle between supplier and base currency.

Select Display in Supplier Currency to view the currency code and rate in vendor currency.

Select Display in Base Currency to view the currency code and rate in base currency.

VAT Percent

The total percentage of all VAT authorities added up for the VAT code.

VAT Entity

The entity in your organization that reports VAT.

The VAT entity is determined from the GL Business Unit associated with the Purchasing Business Unit.

If an entry exists for the GL business unit, then VAT calculations are performed on the work order. If not, VAT fields are hidden on the work order.

VAT Amount VAT amount charged in the transaction line currency.

Tax Applicability Choose Sales/Use Tax applicability depending on whether sales or use tax is applied for this work order.

Sales Tax Amount Total taxable amount.

Sales Tax Percent The total SUT percentage.

Currency Code Displays the currency code associated with the vendor location.

Rate Detail Click the Rate Detail link for currency and exchange rate information.

Rate Breakdown Enter the rate breakdown for the work order.

Note. If the work order was created from a filled requisition, the rate breakdown will be display only.

Rate Enter the rate of pay associated with the work order. 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 with the rate sheet, you receive either an error or a warning message.

UOM (rate of measure) Enter the unit of measure for the defined rate, or choose a unit of measure from the list of available values.

Expense Rate The rate allowed for expenses.

Expense Amount The total amount spent for the work order. The system calculates the expense amount as the work order rate multiplied by the work order duration. The expense amount is stored in both the vendor and base currencies.

WO Amount Total amount allowed for the work order.

Note. You can edit the Expense Rate, UOM, and Amount fields only if the requisition is not associated with a work order. If the requisition is associated with a work order, the values appear by default from the requisition and can only be viewed.

Total Time/Exp Amount

Labor Amount Displays the total amount service providers billed on timesheets. It does not include any tax values and is updated when a new time report is entered.

Expense Amount Displays the total expense amount service providers billed on timesheets. It does not include any tax values and is updated when a new time report is entered.

Billable Amounts 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.

Note. These fields appear once the work order is released and time and expense sheets have been logged.

Current Billed Time/Exp Amount

Labor Amount Displays the amount service providers billed from the current timesheet. It does not include any tax values and is updated when a new time report is entered.

Expense Amount Displays the expense amount billed from the current timesheet. It does not include any tax values and is updated when a new time report is entered.

Billable Amount Displays the billable amount reported against a particular work order. It does not include any tax values and is updated when a new time report is entered.

Note. These fields appear once the work order is released and time and expense sheets have been logged.

Invoiced Amount

Labor Amount Displays the labor amount invoiced from the current timesheet. It does not include any tax values and is updated when the invoice is approved.

Expense Amount Displays the expense amount invoiced from the current timesheet. It does not include any tax values and is updated when the invoice is approved.

Billable Amount Displays the billable amount reported against a particular work order. It does not include any tax values and is updated when the invoice is approved.

Note. These fields appear once the work order is released and time and expense sheets have been logged.

Work Order VAT

Access the Work Order VAT page.

Use this page to review the VAT defaulting 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 will be copied onto the work order where it will be view only.

Note. You can edit the VAT defaults only if purchase orders are not integrated with work orders

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Note. 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 displaying 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/or purchase of goods separately from services.

Note. Since these are work orders, physical nature should always be 'Services', and you won't be to change it.

VAT Locations

Location Country Displays the Purchasing business unit bill to location country.

Location State Displays the 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 flag setting in the Purchasing defaulting hierarchy (for example on the vendor or business unit), the system sets the value for this field as follows:

- If the flag specifies the ship from location, this field is set to the vendor's ship from location country
- If the flag specifies the ship to location, this field is set to the ship to location country.
- If the flag specifies the buyer's location, this field is set to the Purchasing business unit bill to location country.
- If the flag specifies the suppliers location, this field is set to the vendor's order from location country.

Service Performed State This value is displayed only if the Service Performed Country requires that VAT be tracked by state or province. Depending on the services performed setting in the Purchasing defaulting hierarchy (for example on the vendor or business unit), the system sets the value for this field as follows:

- 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 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/province, 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/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 apply.

Place of Supply Driver Displays the usual place of supply (i.e. 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. Options are: *Buyer's Countries, Supplier's Countries,* or *Where Physically Performed.*

Reporting Country Displays the country for which this VAT will be reported. This is the VAT Entity VAT registration country and 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. Options 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. Options 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 will not use discount amounts, only discount percentages.

The default value comes from the VAT entity driver.

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. Options 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, PO 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. Options 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 non-recoverable (non-taxable) VAT.

For the Canadian public sector, the use type also determines the rebate of the non-recoverable 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, either 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 only available 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. Options 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 European Union. 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 European Union, and the vendor is not registered in the ship to country, the transaction would be treated as an import. If the flag on the entry in the VAT Country table for the VAT reporting country indicates that VAT on imports should be self-assessed, the transaction will be treated as a Self-Assess Goods Import, and both input and output VAT will be 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 European Union, and the vendor is not registered in the ship to country, the transaction would be treated as an import. If the flag 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 will be 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 will be 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.

Applicability Displays the VAT status, which comes from an algorithm. Options are:

Taxable

Exempt (not subject to VAT)

Outside of Scope of VAT

Suspended

Exonerated

Record Output

Selection of this check box enables entry of vouchers where VAT is not included on the invoice but is payable to your VAT authority rather than the vendor. In this case, you will be accounting for both input and output VAT for the purchase. This will be 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 PeopleSoft delivered VAT system setup data.

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 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 your changes. All changes 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: PeopleSoft recommends that you 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. Options 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 you selected. Any changes you have previously made to VAT defaults will be lost.

Note: Reset completely redetermines the VAT defaults. This does not necessarily mean they will be reset to their original values. For example, the user may not have changed any VAT default values, but if a VAT driver field was changed, pressing Reset redetermines all defaults based on the new driver value.

Viewing Work Order Sales and Use Tax Information

Access the Sales/Use Tax Information for Maintain Services Work Order page.

Use this page to review the Sales and Use tax information for the work order. If the Sales and Use Tax 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 SUT information will be copied onto the work order where it will be view only.

Note. You can edit the Sales and Use Tax information only if purchase orders are not integrated with work orders

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Ultimate Use Code	Enter an ultimate use code to override the default tax rate for a location.
Exception Type 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 calculates the sales and use tax using the changes made on the page.

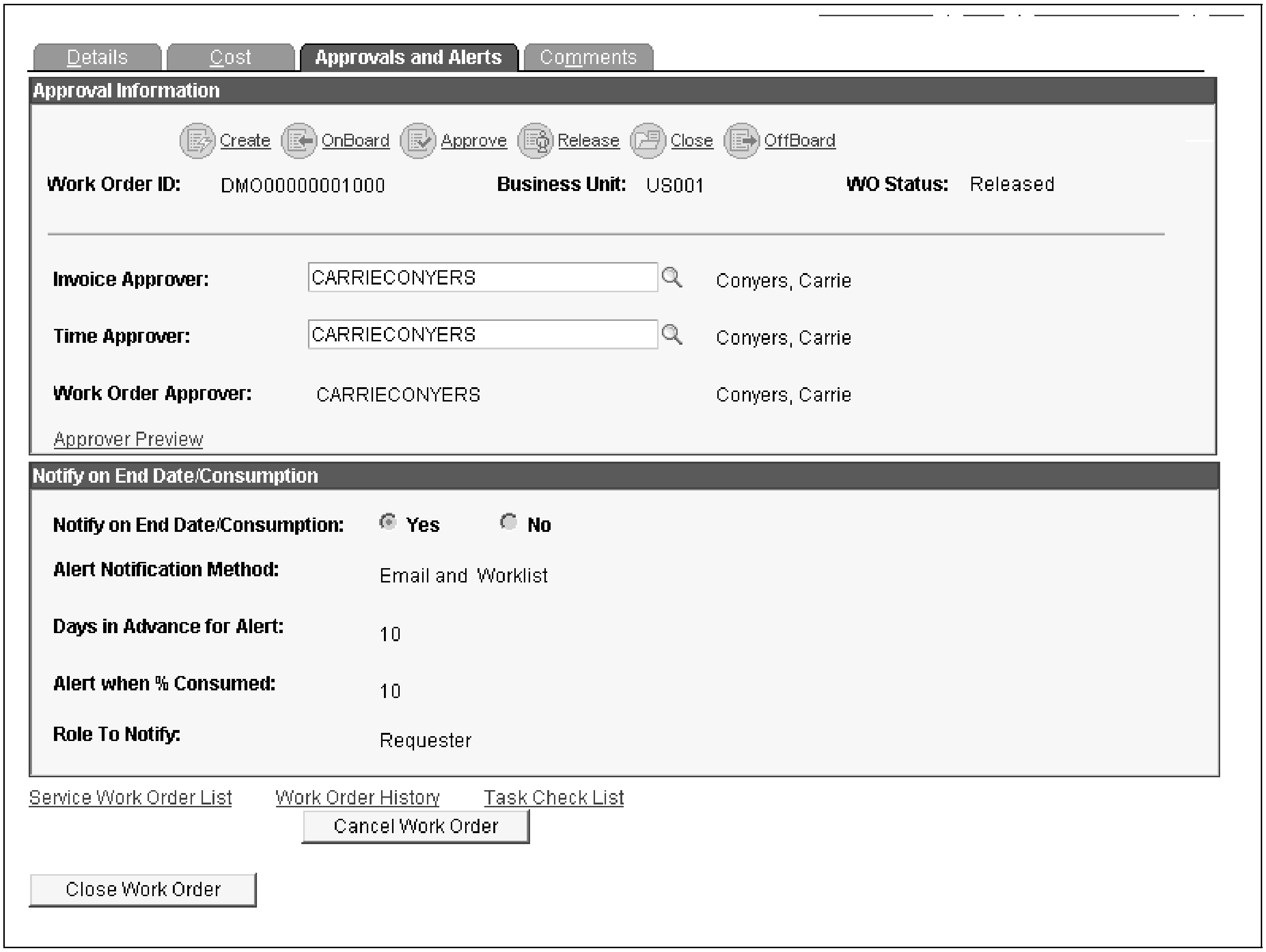
Calculation Parameters

Include VAT (include value added tax)	This setting is especially 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 defaults from the Ship To Location Sales/Tax setup page.

Work Order Approvals and Alerts

Access the Work Order - Approvals and Alerts page.



Work Order- Approvals and Alerts

Approval Information

Invoice Approver Enter the name of the person responsible for approving the invoices associated with this work order. The value defaults from the requester or service coordinator defaults. The lookup contains all users with the role action *SP_APPROVER*.

Time Approver This field appears if you selected a resource-based work order. Select the name of the person who approves timesheets associated with the work order. The value defaults from the requester or service coordinator defaults. The lookup contains all users with the role action *SP_TIME_APPROVER*.

Notification Options

The notification options default first from the service requester or service coordinator defaults and if they do not exist, it defaults from the business unit definition.

Notify on End Date/Consumption Select the check box to allow the system to access the notification options. If the check box is checked, the system allows you to access

	Notify Days Before Ends, Consumption Alert %, Alert Notification Method, and Role to Notify fields.
Alert Notification Method	Select the method of notification. Options are: *Email and Worklist:*Sends a worklist with an email and alerts the user for next course of action. *Worklist:*Sends a worklist and alerts the user for the next course of action. **Note.** The user has the option to extend the work order by extending the time and increasing the work order amount.
Days in Advance for Alert	Enter number of days prior to which the user must be notified before the work order ends.
Alert when % Consumed	Enter percentage amount prior to which the user must be notified before the work order amount is consumed.
Role to Notify	Select if the End Date/Consumption has to be notified to the Invoice Approver, Requester or Time Approver role.

Creating Purchase Orders With the Quick Sourcer

You can create a purchase order (PO) from a service work order that is either tied to a requisition, or a service work order that is not tied to a requisition. If the work order is tied to a requisition, you do not need to create ChartFields information. ChartField information for the requisition appears by default on the purchase order. However, if the work order is not tied to a requisition, ChartField information is required.

If you are creating a purchase order for a work order that is not linked to a requisition, you must use the link on the work order page as the standard requisition sourcer page does not have a work order prompt.

Note. You cannot release a work order without creating and dispatching the PO first.

This section discusses how to:

- Enter parameters for the AutoSelect Requisitions Process.
- Enter parameters for the PO Calculations Process and the Create Purchase Order Process.

Understanding the Quick Sourcer Process

The Quick Sourcer process combines the following PeopleSoft Purchasing processes:

Process	Description
AutoSelect Requisitions process (PO_REQSORC)	Applies the *priority one* vendor to each requisition line.

Process	Description
PO Calculations process (PO_POCALC)	Verifies that the requisition has been completely filled from inventory stock. If it has not, the process passes the remaining quantity that is needed to the Create Purchase Order process.
Create Purchase Order process (PO_CREATE)	Creates a purchase order for requisition quantities that were not filled by the Build Inventory process. You can set up the system so that if there is not enough inventory stock, an MSR is issued for part, and a purchase order is created for the remaining quantity that is needed.

Pages Used to Create Purchase Orders With the Quick Sourcer

Page Name	Object Name	Navigation	Usage
Quick Sourcer - Autosource Parameters	PV_RUN_REQSORC_1	Click the Quick Source link on the Maintain Services Work Order 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.

Entering Parameters for the AutoSelect Requisitions Process

Access the Quick Sourcer - Autosource Parameters 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 Defaults *Purch Ord* as the type of requisition.

Item ID Required Defaults check box as unselected as work orders do not have an item ID.

Business Unit and To Business Unit Defaults the work order business unit.

Work Order ID Defaults the work order ID.

Vendor Defaults the work order vendor.

Requisition ID Defaults the work order requisition ID, if the work order is linked to a requisition.

See Also

PeopleSoft Managing Items 8.8 PeopleBook, “Working With Items,” Viewing Item Definition and Item Change Information

PeopleSoft Purchasing 8.8 PeopleBook, “Using Purchase Order Sourcing,” Running the AutoSelect Requisitions Application Engine Process

Entering Parameters for the PO Calculations and Create Purchase Order Processes

Access the Quick Sourcer - Purchase Order Values page.

Buyer Defaults to 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 marked for consolidation.

Pre-Approve Vendor Select to automatically approve the vendor that the PO_POCALC process selects. This enables you to run the PO Calculations process (PO_POCALC) and the Create PO process (PO_POCREATE) as a unit, without having to approve the vendors. Defaults as selected.

Build PO’s as Approved Select so that the POs that are created when you run the Create PO process (PO_POCREATE) have an *Approved* status. If you select this option, the process examines auto approval criteria set at the business unit level. Defaults as selected.

Expedite Staged POs Select to source all requisitions that are located in the staging table. Defaults as selected.

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, your performance is faster, but you might have purchase orders with non-sequential line numbers that do not begin with 1. Defaults as unselected.

Allow Dispatch When Approved Select to make the resultant purchase orders eligible for dispatch. Defaults as selected.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, “Using Purchase Order Sourcing”

Managing Purchase Orders

Access the Maintain Purchase Orders page.

Use this page to run budget checking (if commitment control is enabled for Purchasing), check doc tolerance and dispatch purchase orders.

Note. You can edit the Sales and Use Tax information only if purchase orders are not integrated with work orders

Budget Check

Click the Budget Check button to run budget checking for this PO. This button is available if commitment control is enabled for PeopleSoft Purchasing.

Doc Tol 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.

Maintaining Work Orders

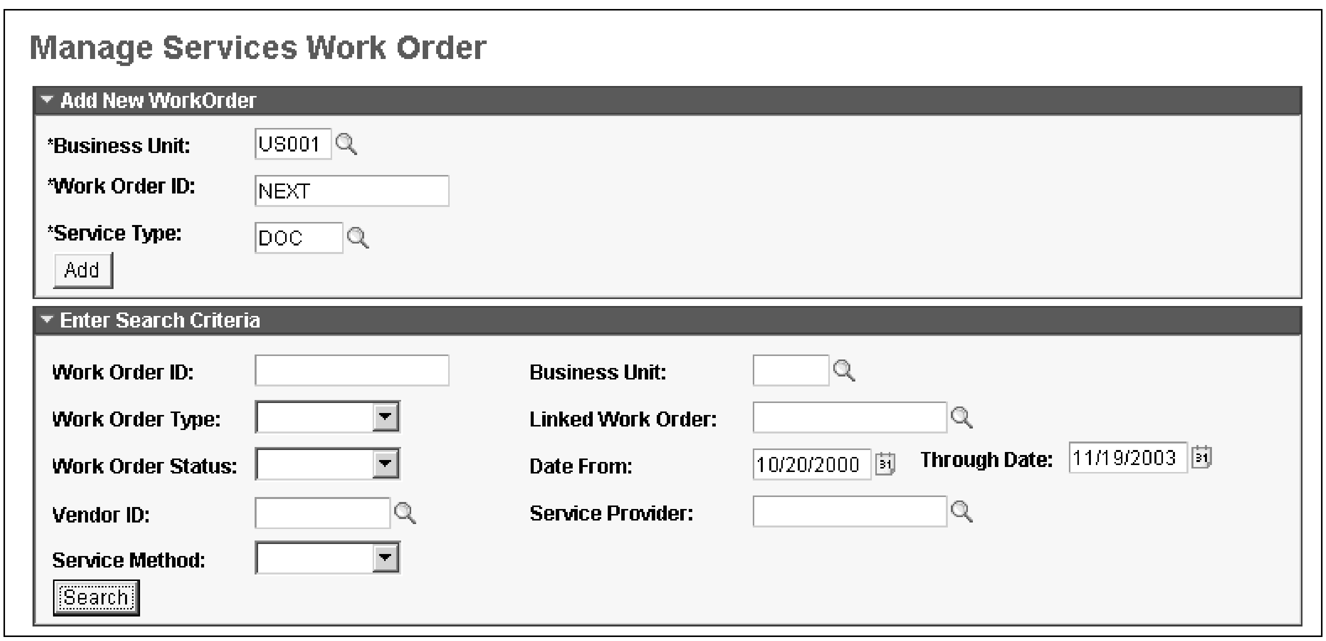
This section discusses how to maintain work orders.

page Used to Maintain Work Orders

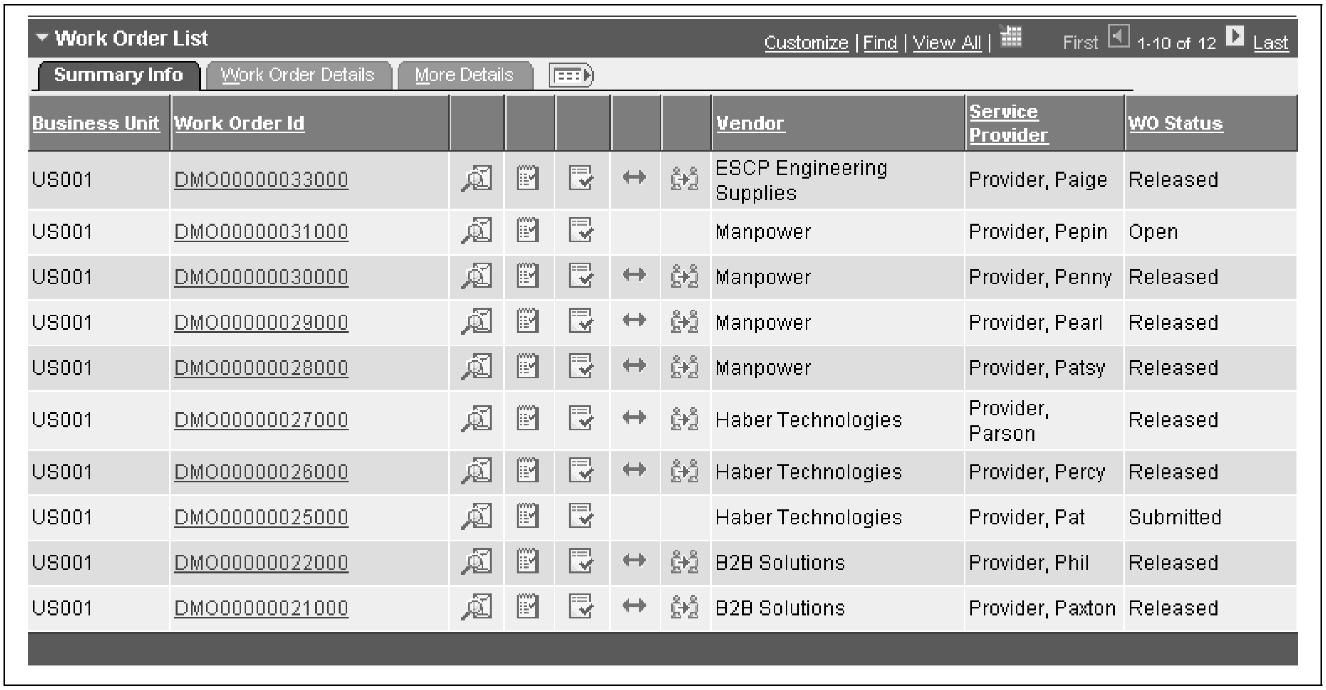
Page Name	Object Name	Navigation	Usage
Manage Services Work Order	SPF_WORDER_ROSTER	Services Procurement, Maintain Services Work Orders	Review existing service work orders, create, edit, cancel, or access related work order information.
Services Work Order History	SPF_WO_HISTORY	Click the Work Order History button on the Services Work Order Roster page.	View the history of your work order.
View Task Checklist	SPF_WO_TASK_CHKLST	Click the View Logistical Task List button on the Services Work Order Roster page.	View all logistical tasks associated with the work order.
Work Order Approval Status	SPF_WO_APPR_STATUS	Click the Approvers Status button on the Manage Services Work Order page.	Approve work orders.

Managing Work Orders

Access the Manage Services Work Order page.



Manage Services Work Order (page 1 of 2)



Business Unit	Work Order Id						Vendor	Service Provider	WO Status
US001	DMO00000033000						ESCP Engineering Supplies	Provider, Paige	Released
US001	DMO00000031000						Manpower	Provider, Pepin	Open
US001	DMO00000030000						Manpower	Provider, Penny	Released
US001	DMO00000029000						Manpower	Provider, Pearl	Released
US001	DMO00000028000						Manpower	Provider, Patsy	Released
US001	DMO00000027000						Haber Technologies	Provider, Parson	Released
US001	DMO00000026000						Haber Technologies	Provider, Percy	Released
US001	DMO00000025000						Haber Technologies	Provider, Pat	Submitted
US001	DMO00000022000						B2B Solutions	Provider, Phil	Released
US001	DMO00000021000						B2B Solutions	Provider, Paxton	Released

Manage Services Work Order (page 2 of 2)

The Manage Work Order page is the central location for maintaining your work orders. Use the search and sort features to streamline the search results for your work order. Once you enter your search criteria, proceed to the roster area where you can edit, establish workflow, and cancel work orders.

Search and Sort Work Orders

Work Order ID Enter the work order ID assigned when the work order was created.

Date From/Through Date Select a range of creation dates for the requisitions to be retrieved.

Search Results

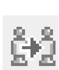
Work Order ID Click to edit your work order.

Click the Extend Work Order button to extend the duration of the work order contact.

Note. Clicking this button automatically returns you to the Maintain Services Work Order page, where you can enter a new end date for your work order. Logistical tasks that are associated with the work order type Extension are therefore associated with the new extended work order.

A new PO amount associates with the extended work order, which requires additional approval.

You can extend resource-based work orders only.



Click the Assign New Resources button to assign a new service provider to the work order.

Note. Clicking this button automatically returns you to the Maintain Services Work Order page, where you can enter a new start date and select a new service provider for your work order.

You can assign new resources to resource-based work orders only.

See Also

Chapter 3, “Implementing Your PeopleSoft Services Procurement System,” page 21

Viewing Logistical Tasks

This section discusses how to view logistical tasks.

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 pre-approval and post-approval executions. Pre-approval tasks must be completed before the work order is approved. For example, a pre-approval logistical task might include assigning a new badge or ordering a new laptop. Post-approval tasks, on the other hand, must be completed before a work order is released to a service provider. For example, post-approval logistical tasks might include scheduling orientation or setting up the service provider email account.

The basic flow of logistical tasks is as follows:

1. Create a service work order.
2. View the logistical task checklist.

   Once pre-approval tasks are complete, check the Execution Complete check box.
3. Submit the work order for approval.

   Once an open work order is submitted for approval, the system automatically checks for all pre-approval logistical tasks that are assigned to that work order. You must complete all pre-approval tasks before submitting the work order for approval.
4. Release the work order to the service provider.

   Once the work order is released to the service provider, the system automatically checks for all post-approval logistical tasks that are assigned to that work order. You must complete all post-approval tasks before releasing the work order.

   Once the work order is released to the service provider, the service provider can use it to log time and expense.

See Also

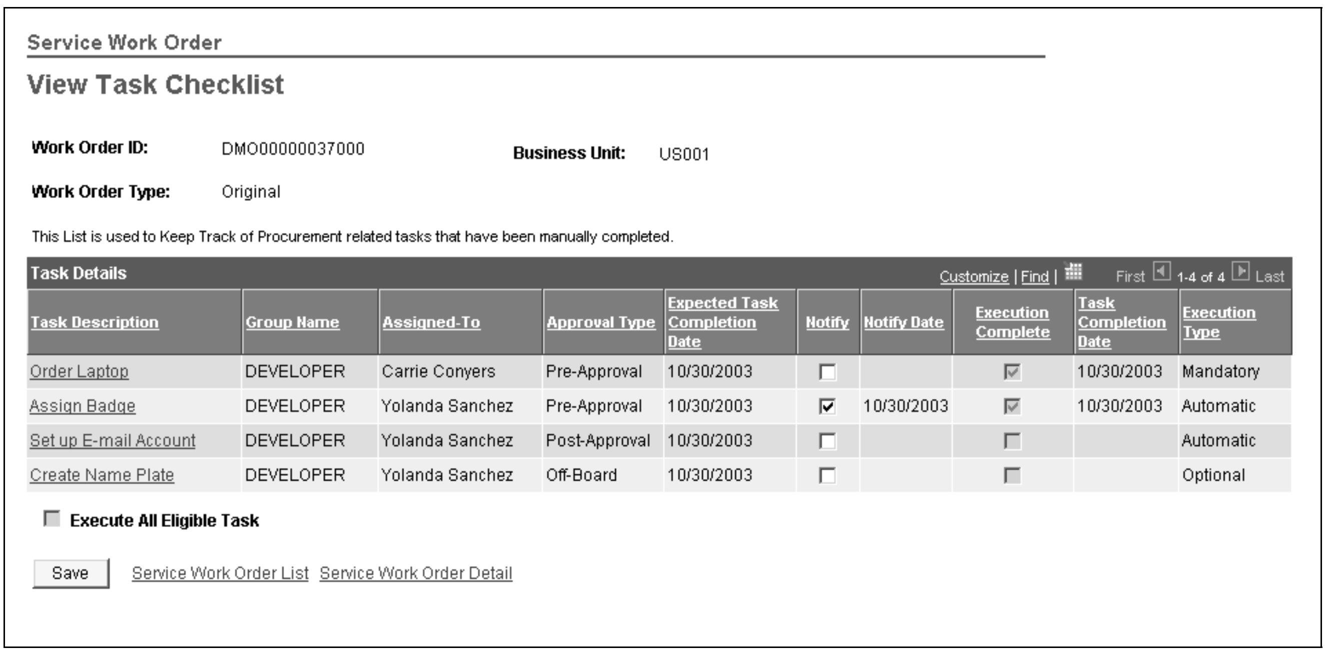
Chapter 3, “Implementing Your PeopleSoft Services Procurement System,” Setting Up Logistical Tasks, page 80

Pages Used to View Logistical Tasks

Page Name	Object Name	Navigation	Usage
Logistical Task	SPB_TASK_PG	Services Procurement, Define Services Procurement Click the Logistical Task link in the Logistical Support group box and select a setID value.	View the checklist for each task.
View Task Checklist	SPF_WO_TASK_CHKLST	Services Procurement, Requisition Fulfillment, Manage Services Work Orders Click the View Logistical Task List button.	View logistical tasks.
View Task Detail	SPF_WO_VIEW_TASKDT	Click the Task Short Description link under the task details group box.	View details of your logistical task.

Viewing a Task Checklist

Access the View Task Checklist page



View Task Checklist page

Task Details View the task details associated with the work order.

Assigned To Displays the requester or approver to whom the task has been assigned for execution.

Notify Select to send an email message to the person to whom the task is assigned.

Execution Complete Select when the logistical task is complete.

CHAPTER 14

Managing Time and Expense

This chapter lists prerequisites and discusses how to:

- Create time and expense sheets.
- Manage and submit time and expense sheets.
- Approve and adjust time and expense sheets.
- Manage time and expense sheet worklists.

Understanding Time and Expense in PeopleSoft Services Procurement

The service provider uses the timesheet to record and submit time and expenses to an approver for immediate, online approval. 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.

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 regarding a service provider's performance on a project.

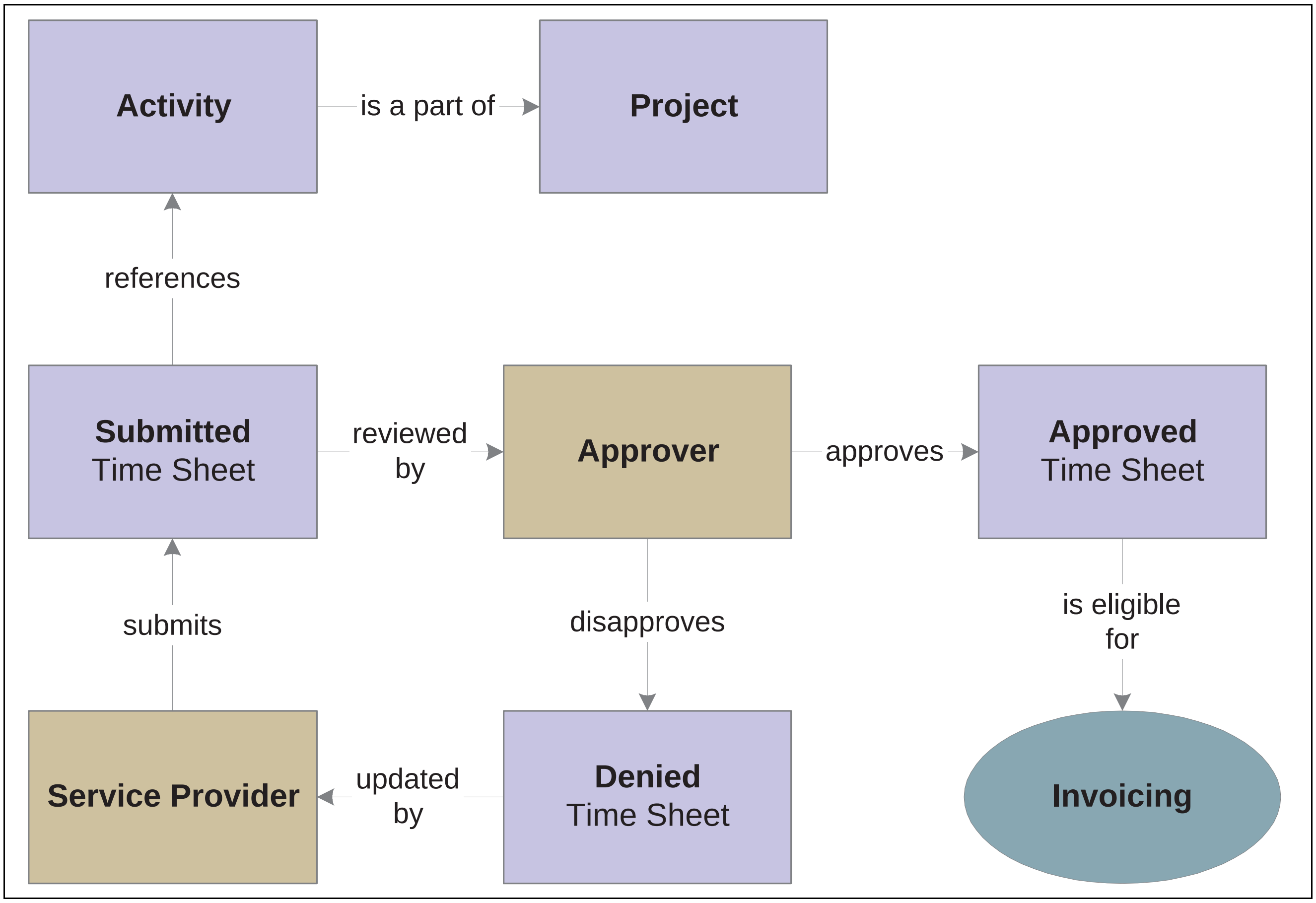
You use the Manage Time/Expense Sheets page as the focal point for all time and expense activity in PeopleSoft Services Procurement. Use this page to:

- Create, edit, submit or view time and expense sheets. (supplier service provider)
- View, adjust or approve time and expense sheets. (timesheet approver)
- Filter reports by selecting your criteria in the timesheet status, service provider, or date fields.
- Access pages used to modify time and expense details.

Approval Process

The timesheet approval process begins when the service provider submits his/her 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 prior to approval. Approved timesheets are eligible for adjustment upon invoicing.

The following diagram illustrates the timesheet approval process:



Timesheet approval process

Approval Methods

There are three ways to approve a timesheet:

- Mass approval of multiple timesheets.
- Mass line approval for multiple lines.
- Line by line approval.

See Chapter 14, "Managing Time and Expense," Managing Time and Expense Sheets, page 219.

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 it to the project manager on a timesheet for immediate approval.

The service provider can enter expenses while filling in the timesheet. A single click from the timesheet accesses the expense reporting area where the service provider can enter expenses associated with the reporting period.

Note. Expenses can only be entered if there is an expense amount specified on the work order.

See Also

“Preface,” Common Elements Used In This PeopleBook, page xxiv

Prerequisites

These attributes must be set up before entering time and expense information:

- Services project business units.
- Services project types.
- Services templates.
- Expense business purposes.
- Expense distance rates.
- Email messaging.
- Preferred merchants.
- Expense types.
- Payment types.
- Expense locations.
- Time reporting codes.

A work order must also be defined before time or expense 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 3, “Implementing Your PeopleSoft Services Procurement System,” page 21

Chapter 13, “Managing Work Orders,” page 175

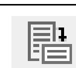
Creating Time and Expense Sheets

This section discusses how to:

- Create a timesheet.
- Add attachments to a timesheet.
- Enter time worked on a project.
- Enter ChartField information for PeopleSoft Projects.
- Enter project time details.

- Enter general expense information.
- Add expense lines.
- Enter expense line information.

Pages Used to Create Time and Expense Sheets

Page Name	Object Name	Navigation	Usage
Manage Time/Expense Sheets	SPA_MANAGE_TE	Manage Services Time/Expense (external)	View, search, and sort the list of expense sheets. Access the timesheet you want to modify. To add a new timesheet, select a reporting period end date, business unit and work order. Click the Add button.
Time/Expense Summary	SPA_TIME_LINES	Click a linked time report.	Enter time worked.
General Time/Expense Information	SPA_TIME_MAIN	Click the General Report Information link on the Time/Expense Summary page.	View general time report information and add comments.
Attachment	SPA_TIM_DOC_ATTACH	Click the Add Attachment link from the Time/Expense Summary 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.
Projects Information	PC_FIELDS	Click the Project Fields button from the Time/Expense Summary page.	Add project ChartField information used for integration with PeopleSoft Projects.
Project Time Details	SPA_TIME_DTL	 Click the Details button from the Time/Expense Summary page.	View or change billing action.
General Information	SPA_SHEET_MAIN2	Click the Add Expense button from the Time/Expense Summary page.	Enter report description, business purpose, and other comments.
Services Expense Report Details	SPA_SHEET_LINES2	Click Continue from the General Information page.	Select the expense type for each expense line.
Add Expense	SPA_SHEET_EXPENSE2	Click Add from the Services Expense Report Details page.	Enter detailed expense lines and prepare the expense sheet for approval.

Page Name	Object Name	Navigation	Usage
Exchange Rate Detail	EXCH_RT_DTL	Click the Rate Detail link from the Add Expense page.	View exchange rate information.
Copy From Existing Timesheets	SPA_COPY_TIME	Services Procurement, Maintain Services Time/Expense Click the Copy From Existing Timesheets link.	Enables the service provider to copy the timesheet template from an existing timesheet.

Creating a Timesheet

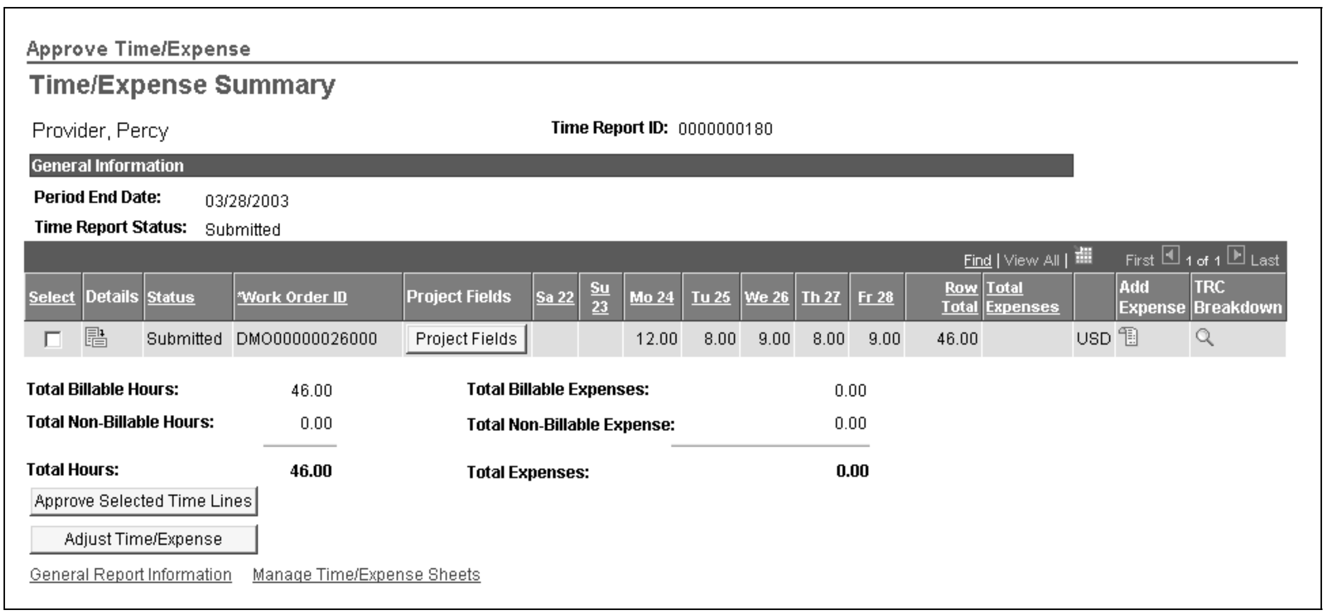
Access the General Time/Expense Information page.

The entered work order and the associated project become defaults for every time entry line.

The template is used to determine the time line summary display.

Entering Time Worked by Week

Access the Time/Expense Summary page.



Time/Expense Summary 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 allows for entering time on a weekly basis, with the week end date being Friday.

Add Attachment Click to add a document to the time/expense sheet.

Click the Details button to access the Project Time Details page. Designate the time line as billable or non-billable. The Project Time Details page is used primarily during the approval process. It also contains invoice information and a time line history audit.

Work Order ID

Select the work order to which the time is being charged. The list of work orders available include those that belong to the business unit entered in the Add Dialog and that use the same template as the work order that was entered in the Add Dialog.

Project and Activity ID

These fields appear if PeopleSoft Project Costing is not installed. Select the project and activity to which the time is being charged.

Project Fields

This button appears if PeopleSoft Project Costing is installed. Click to access the Projects Information page where you enter ChartField information associated with the time being charged. The available project ChartFields include those that belong to the project's business unit from the work order on the time line.

Sa through Fr

Enter the total number of hours you worked for each day.

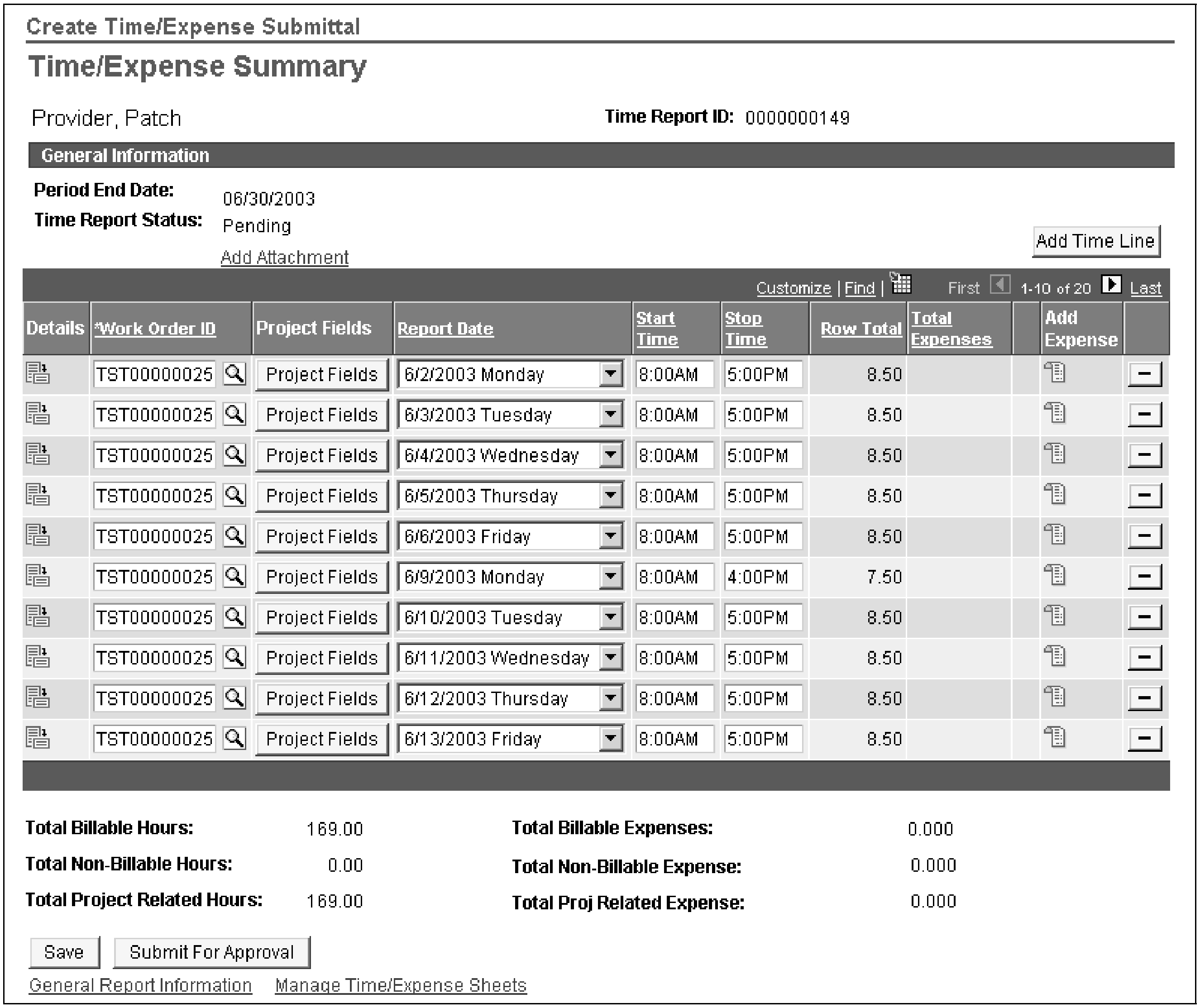
Row Total

Displays the total number of hours worked for that week.

Click the Add Expense button to add expense lines on the General Information page, or view existing expense lines. This field is unavailable if the work order does not allow expenses.

Entering Time Worked by Day using the 24–Hour Clock

Access the Time/Expense Summary page.



Create Time/Expense Submittal

Time/Expense Summary

Provider, Patch

Time Report ID: 0000000149

General Information

Period End Date: 06/30/2003

Time Report Status: Pending

Add Attachment

Add Time Line

Customize | Find | First 1-10 of 20 Last

Details	*Work Order ID	Project Fields	Report Date	Start Time	Stop Time	Row Total	Total Expenses	Add Expense	
	TST00000025	Project Fields	6/2/2003 Monday	8:00AM	5:00PM	8.50			−
	TST00000025	Project Fields	6/3/2003 Tuesday	8:00AM	5:00PM	8.50			−
	TST00000025	Project Fields	6/4/2003 Wednesday	8:00AM	5:00PM	8.50			−
	TST00000025	Project Fields	6/5/2003 Thursday	8:00AM	5:00PM	8.50			−
	TST00000025	Project Fields	6/6/2003 Friday	8:00AM	5:00PM	8.50			−
	TST00000025	Project Fields	6/9/2003 Monday	8:00AM	4:00PM	7.50			−
	TST00000025	Project Fields	6/10/2003 Tuesday	8:00AM	5:00PM	8.50			−
	TST00000025	Project Fields	6/11/2003 Wednesday	8:00AM	5:00PM	8.50			−
	TST00000025	Project Fields	6/12/2003 Thursday	8:00AM	5:00PM	8.50			−
	TST00000025	Project Fields	6/13/2003 Friday	8:00AM	5:00PM	8.50			−

Total Billable Hours:	169.00	Total Billable Expenses:	0.000
Total Non-Billable Hours:	0.00	Total Non-Billable Expense:	0.000
Total Project Related Hours:	169.00	Total Proj Related Expense:	0.000

Save | Submit For Approval

General Report Information | Manage Time/Expense Sheets

Time/Expense Summary 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 allows for entering time using a 24–hour clock, with default start time being 8:00 am and default stop time being 5:00 pm with a 30 minute break subtracted from the total time difference.

Add Attachment	Click to add a document to the time/expense sheet.
	Click the Details button to access the Project Time Details page. Designate the time line as billable or non-billable. The Project Time Details page is used primarily during the approval process. It also contains invoice information and a time line history audit.
Work Order ID	Select the work order to which the time is being charged. The list of work orders available include those that belong to the business unit entered in the Add Dialog and that use the same template as the work order that was entered in the Add Dialog.

Project and Activity ID These fields appear if PeopleSoft Project Costing is not installed. Select the project and activity to which the time is being charged.

Project Fields This button appears if PeopleSoft Project Costing is installed. Click to access the Projects Information page where you enter ChartField information associated with the time being charged. The available project ChartFields include those that belong to the project's business unit from the work order on the time line.

Report Date Enter the date for which you log the time.

Start Time Enter the time when the work started.

Note. The start time is defaulted from the time template defined on the work order.

Stop Time Enter the time when the work ended.

Note. The end time is defaulted from the time template defined on the work order. The

---

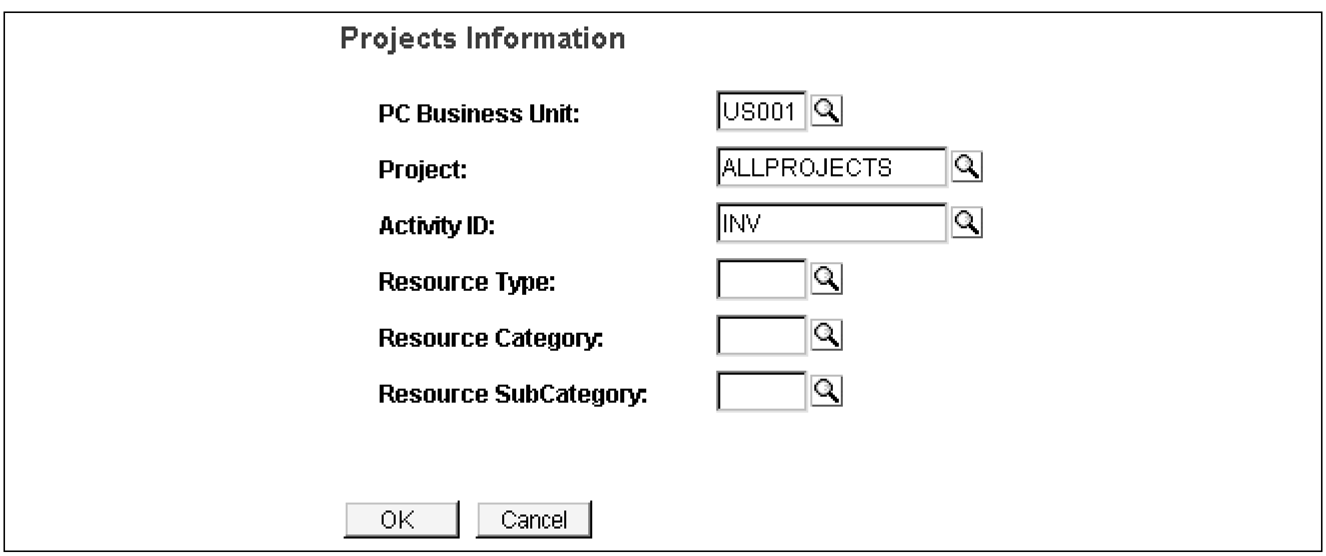
Row Total Displays the total number of hours worked for that day.

Note. The system automatically subtracts the *Break Duration* from the total number of hours. The break duration is defined on the time template.

Click the Add Expense button to add expense lines on the General Information page, or view existing expense lines. This field is unavailable if the work order does not allow expenses.

Entering ChartField Information for PeopleSoft Projects

Access the Projects Information page.



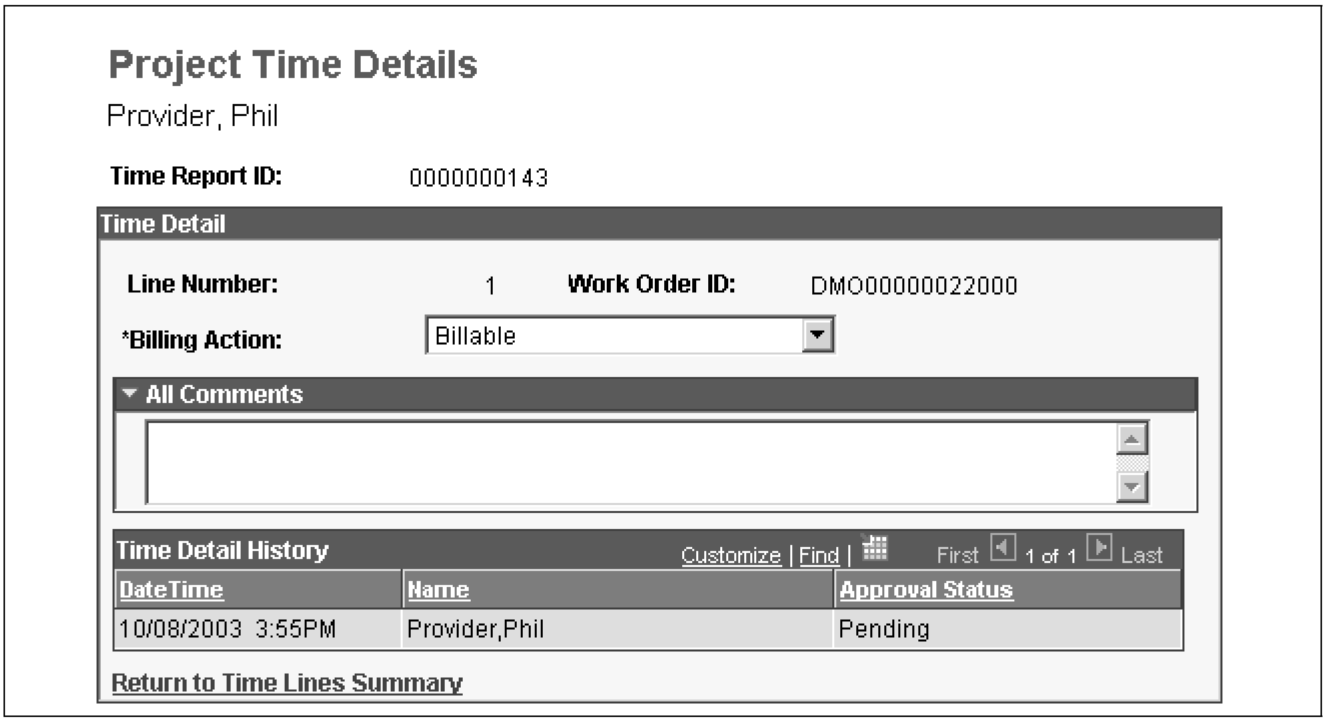
Projects Information page

Enter the ChartField values for the time being charged. The prompt lists values that belong to the project's business unit on the work order. This information is used for integration with PeopleSoft Projects. The system also validates that the project entered exists on the work order specified on the Time/Expense Summary page at save time.

Note. This page is only available if PeopleSoft Project Costing is installed. If it is not installed, you are prompted for just project and activity.

Entering or Viewing Project Time Details

Access the Project Time Details page.



Project Time Details page

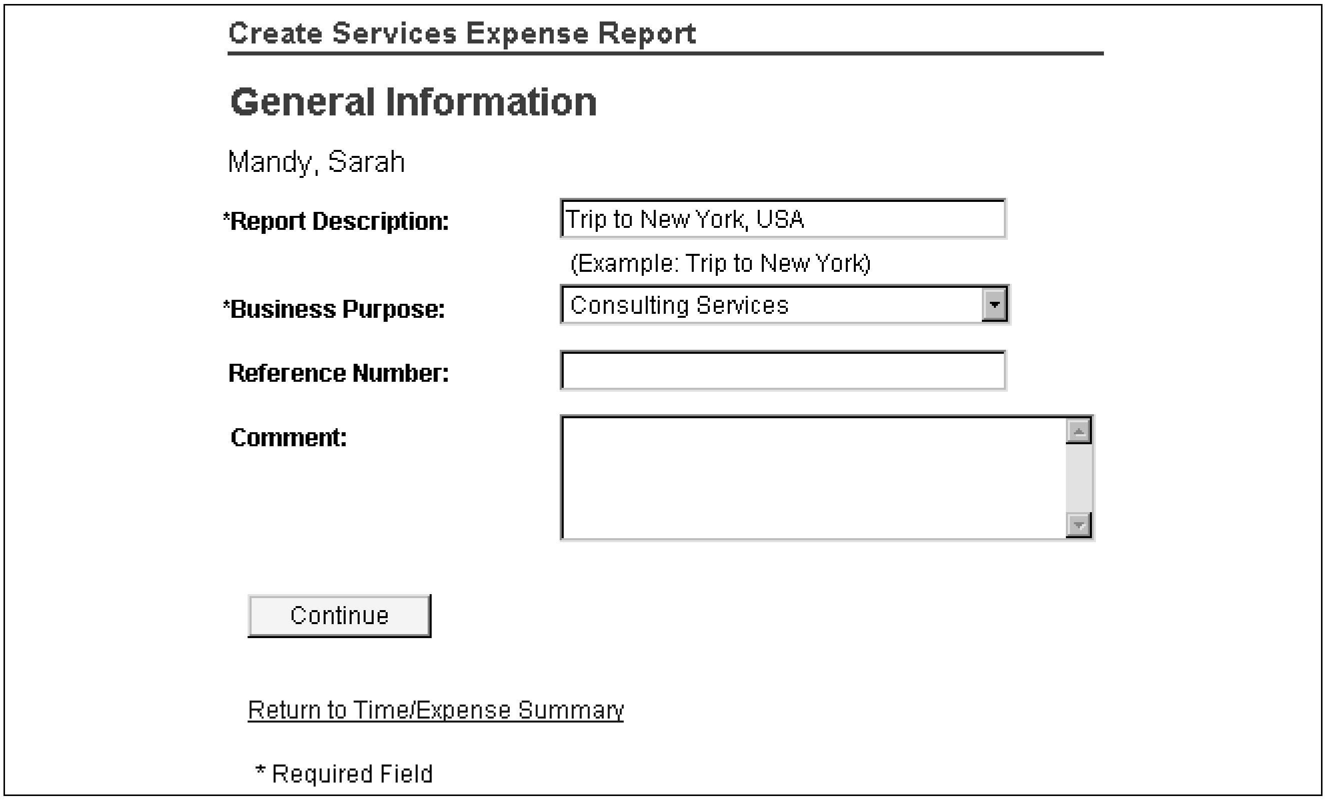
Work Order ID Value is populated after saving the row on the Time/Expense Summary page.

Billing Action Select *Billable* or *Nonbillable*. Default value is *Billable.*

Time Detail History Chronological history of the time line.

Entering General Expense Information

Access the General Information page.

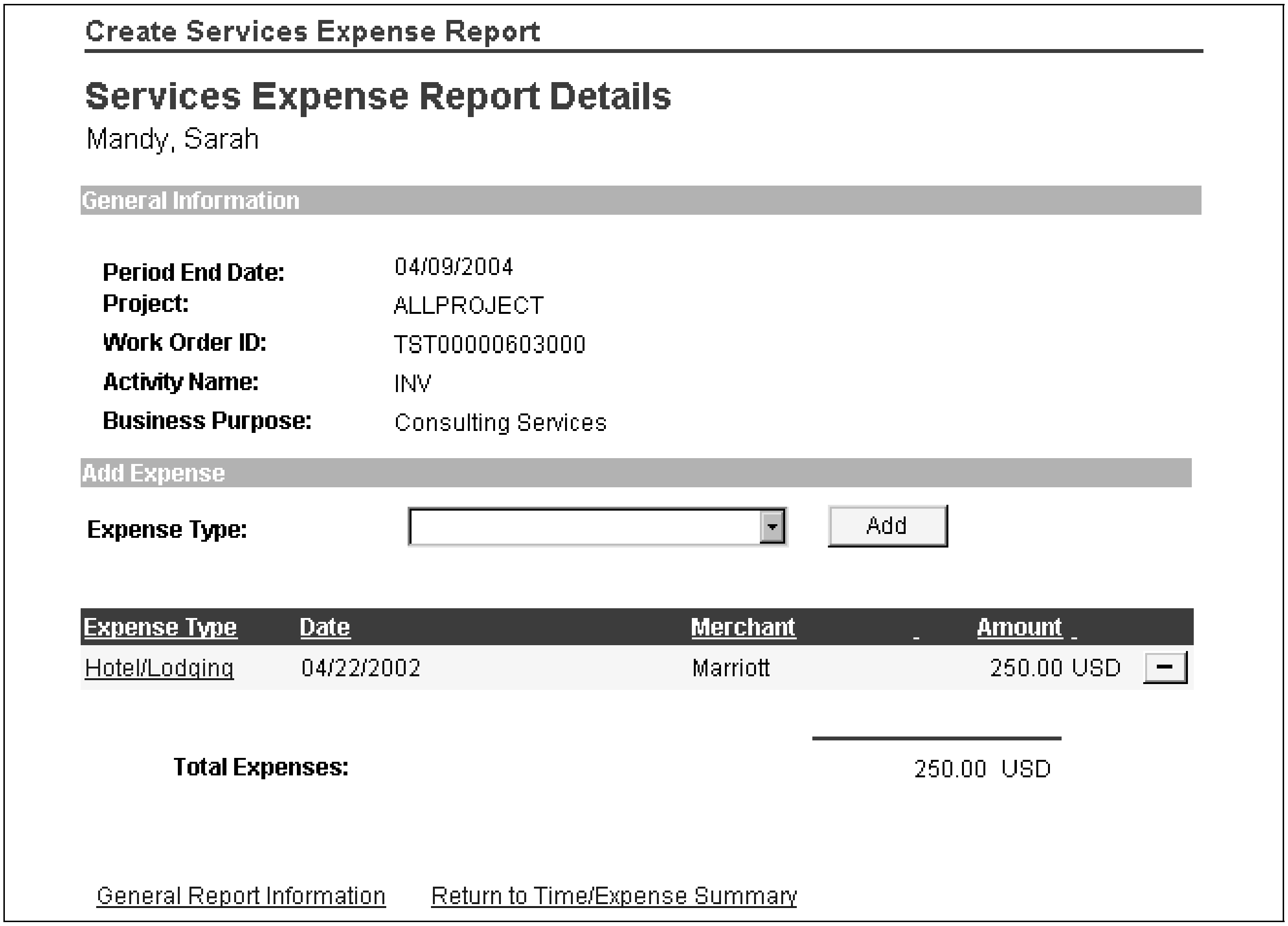


General Information page

Report Description	Enter a description of this report up to 30 characters.
Business Purpose	Select the business purpose of this trip or activity.
Reference	Enter text up to 10 characters.
Comment	Enter general comments regarding the expense sheet.
Continue	Click to go to the Services Expense Report Details page and add expense lines.

Adding Expense Lines

Access the Services Expense Report Details page.



Services Expense Report Details page

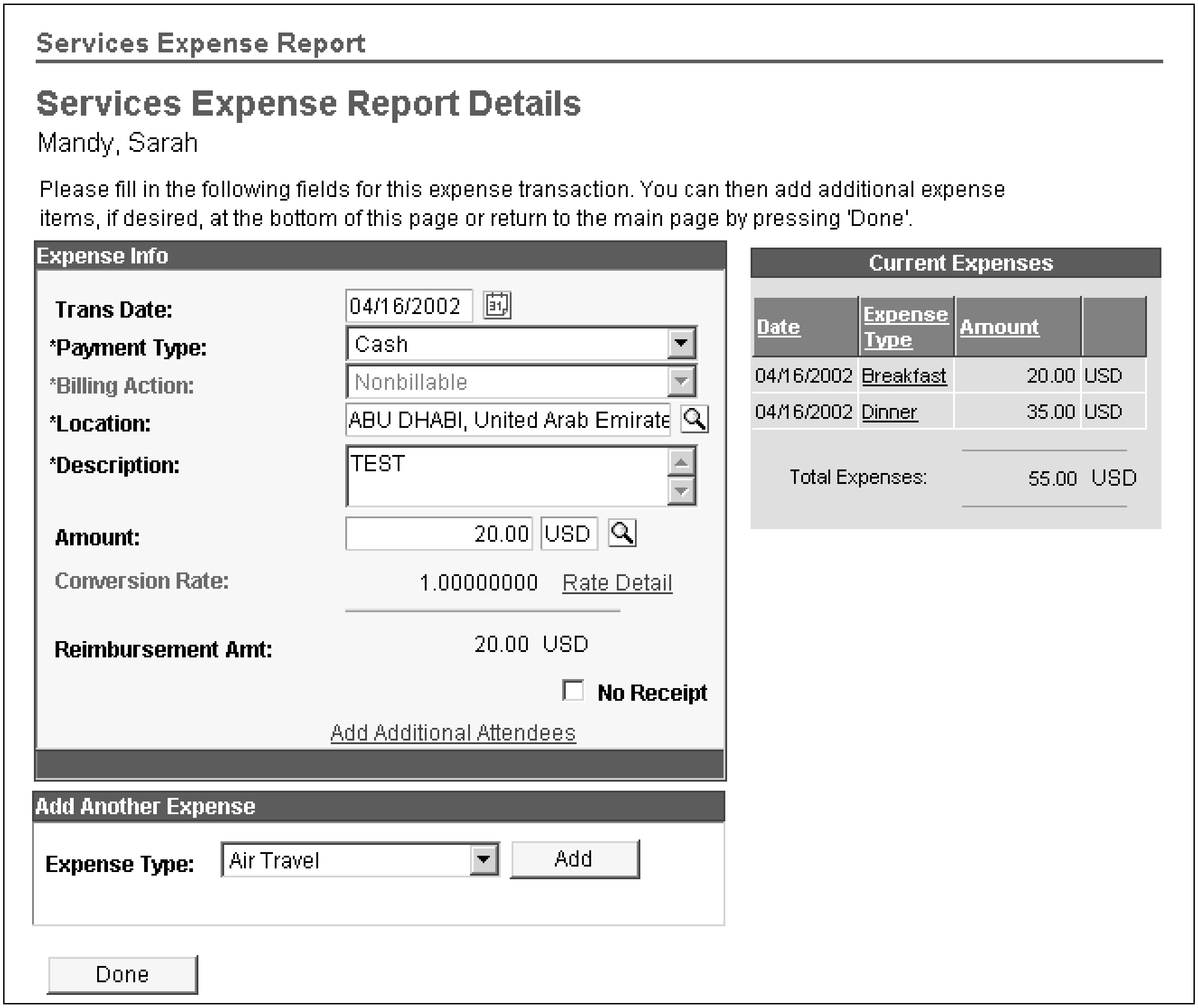
Select an Expense Type and click Add to go to the Add Expense page.

Entering Expense Line Information

Access the Add Expense page.

Depending on how the expense type is defined by your organization, 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.

Shown below is one example of an Add Expense page that appears based on the air travel expense type.



Service Expense Report

Generic Fields Included on Several Add Expense Pages

Trans Date (transaction date) Enter the transaction date for this expense.

Payment Type Enter or 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 select the currency in which it was purchased.

	The currency code is only available for edit if the PeopleSoft Purchasing business unit allows multicurrency purchase orders.
Conversion Rate	This field is automatically populated and cannot be modified.
Reimbursement Amount	Displayed in vendor location currency. The vendor location currency defaults to the Work Order Vendor Location field value. 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 or rate calculation information.
No Receipt	Select this field if there is no receipt 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 Nbr (number)	Enter a reference number for your airline ticket.
Miles	Enter number of miles used to calculate automobile mileage reimbursement.
Add Additional Attendees	For meals, click to add guest or business associate name, company, and title.
Number of Nights	Enter the number of nights included in your hotel stay.
Start Time, 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 this link 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 your system is set up, the appropriate amount may be deducted from the per diem for that day.

Managing Time and Expense Sheets

This section discusses how to:

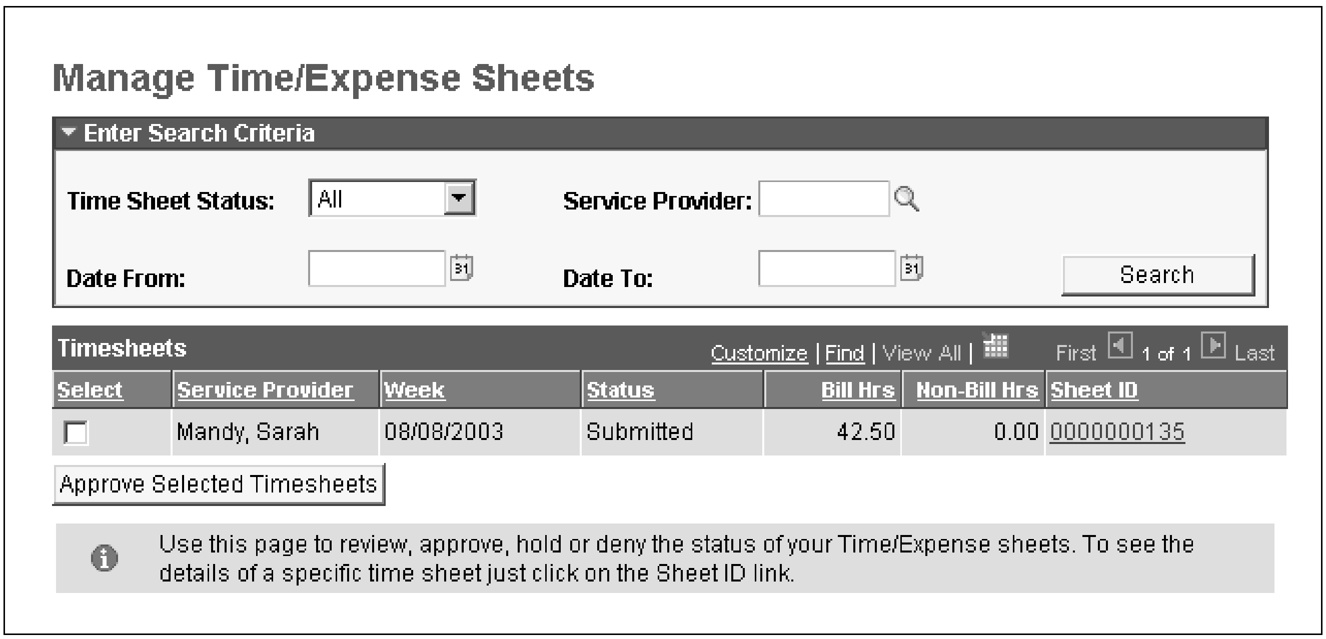
- Manage time/expense sheets.
- Modify time/expense sheet details.
- Submit time/expense sheets for approval.

Pages Used to Manage Time and Expense Sheets

Page Name	Object Name	Navigation	Usage
Manage Time/Expense Sheets	SPA_MANAGE_TE	Services Procurement, Maintain Services Time/Expense	View, search, and sort the list of expense sheets. Access the timesheet you want to modify.
Time/Expense Summary	SPA_TIME_LINES	Click the Sheet ID link from the Manage Time/Expense Sheets page.	Modify time and expense sheet details.
Project Time Details	SPA_TIME_DTL	Click the Details button on the Time Line Summary page.	View comments and time detail history.

Managing Time/Expense Sheets

Access the Manage Time/Expense Sheets page.



Manage Time/Expense Sheet

Search and Sort Time/Expense Sheets

Enter your search criteria and click Search. The search results appear at the bottom of the page.

Timesheet Roster

Sheet ID Click the link to go to the Time/Expense Summary page.

Modifying Time/Expense Sheet Details

You can modify time/expense details as follows:

1. Access the Time/Expense Summary page.

2. Modify the Project ID, Work Order ID, Activity ID, and Time fields as required.
3. Click Detail to modify the Billing Action or to view comments and timesheet history.
4. Click Add Expense to add or delete expenses.

Note. You can not modify a time/expense sheet that has either been submitted for approval or has already been approved.

Submitting Time/Expense Sheets for Approval

You can submit time/expense sheets for approval as follows:

1. Access the Time/Expense Summary page.
2. Click Submit for Approval.
3. Click OK on the Submit Confirmation page.

Warning! After you submit the timesheet for approval, you can’t go back and add time or expenses for the same time period, project and activity combination using the same work order.

Approving and Adjusting Time and Expense Sheets

This section discusses how to:

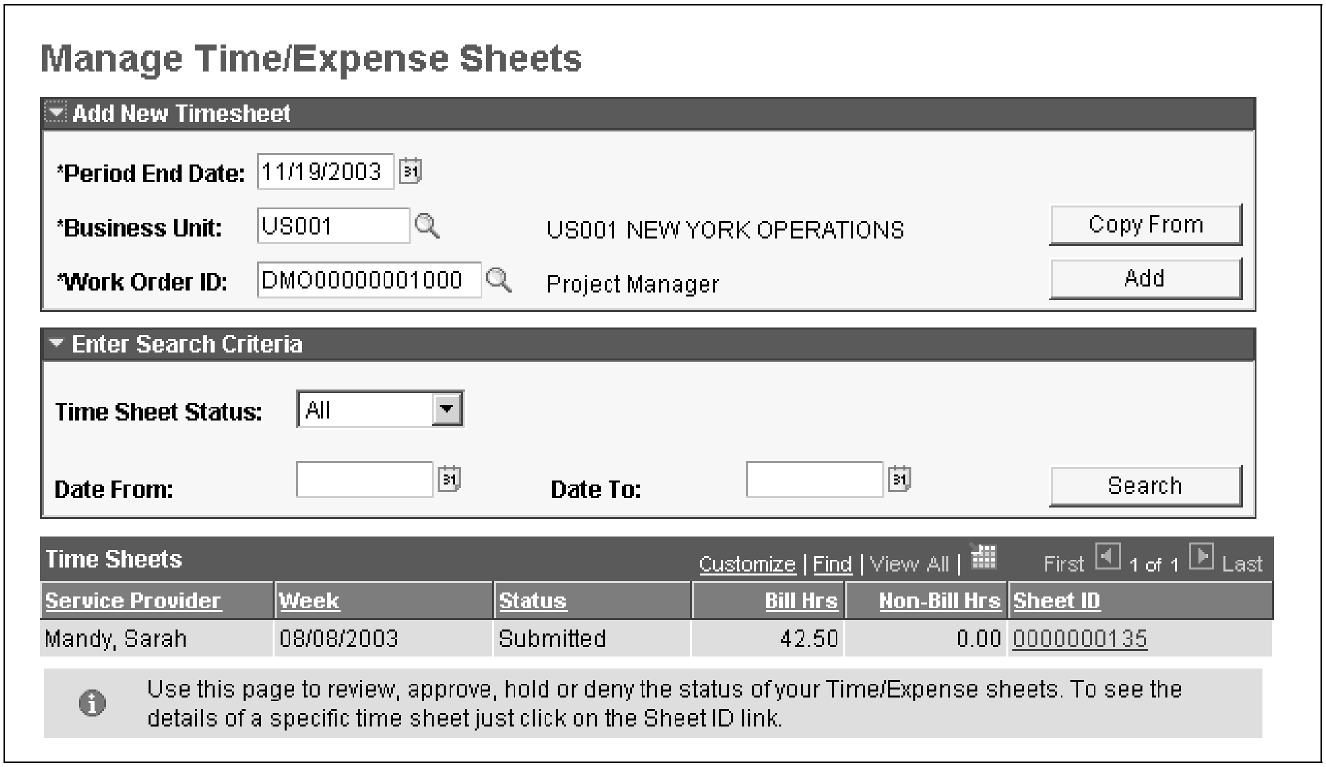
- Approve or deny time/expense sheets.
- Adjust approved time/expense sheets.

Pages Used to Manage Time and Expense Sheets

Page Name	Object Name	Navigation	Usage
Manage Time/Expense Sheets	SPA_MANAGE_TE	Services Procurement, Maintain Services Time/Expense	View, search, and sort the list of expense sheets. Access the timesheet you want to modify.
Time/Expense Summary	SPA_TIME_LINES	Click the Sheet ID link from the Manage Time/Expense Sheets page.	Modify time and expense sheet details. Select the lines to be approved if logged on as the approver.
Project Time Details	SPA_TIME_DTL	Click the Details button on the Time Line Summary page.	Enter a performance rating and comments. Approve or deny a time/expense sheet.
TRC Breakdown of Time Line	SPA_TIME_TRC_BRK	Click a Sheet ID link. Click the TRC Breakdownbutton on the Time/Expense summary page.	View TRC breakdown of time line. **Note.** TRC breakdown is only available for timesheets that allow overtime.
View Time/Expense Adjustment	SPA_TIME_ADJ2	Click the View Adjustments link from the Time/Expense Summary page.	View a list of adjustments entered for the timesheet.
Time Report Detail Adjustment	SPA_TIME_ADJ	Click the Sheet ID link from the View Time/Expense Adjustment page.	View summary information for adjusted sheets.
TRC Breakdown of Time Line Adjustments	SPA_TM_BRK_ADJ	• From the Time/Expense Summary page, click a timesheet ID link, then click the View Adjustments link. • Click the TRC Breakdownbutton on the Time/Expense Adjustment Summary page.	View TRC breakdown of time line adjustments.
Time Entry Project Detail Adjustment	SPA_TIME_DTL_ADJ	Click the Detail button from the Time Report Detail Adjustment page.	View project detail information for adjusted time lines.
Expense Report Line Adjustment	SPA_SHT_LN_ADJ	Click the Add Expense button from the Time Report Detail Adjustment page.	View adjusted expense lines.
Expense Report Line Entry Adjustment	SPA_SHT_EXP_ADJ	Click on the Expense Type link from the Expense Report Line Adjustment page.	View adjusted expense line detail information.

Managing Time/Expense Sheets

Access the Manage Time/Expense Sheets page.



Manage Time/Expense Sheet page

Search and Sort Time/Expense Sheets

Enter your search criteria and click Search. The search results appear at the bottom of the page.

Timesheets Roster

Sheet ID	Click the link to go to the Time/Expense Summary page.

Modifying Time/Expense Sheet Details

You can modify time/expense details as follows:

1. Access the Time/Expense Summary page.
2. Click Detail to modify the Add comments and ratings.

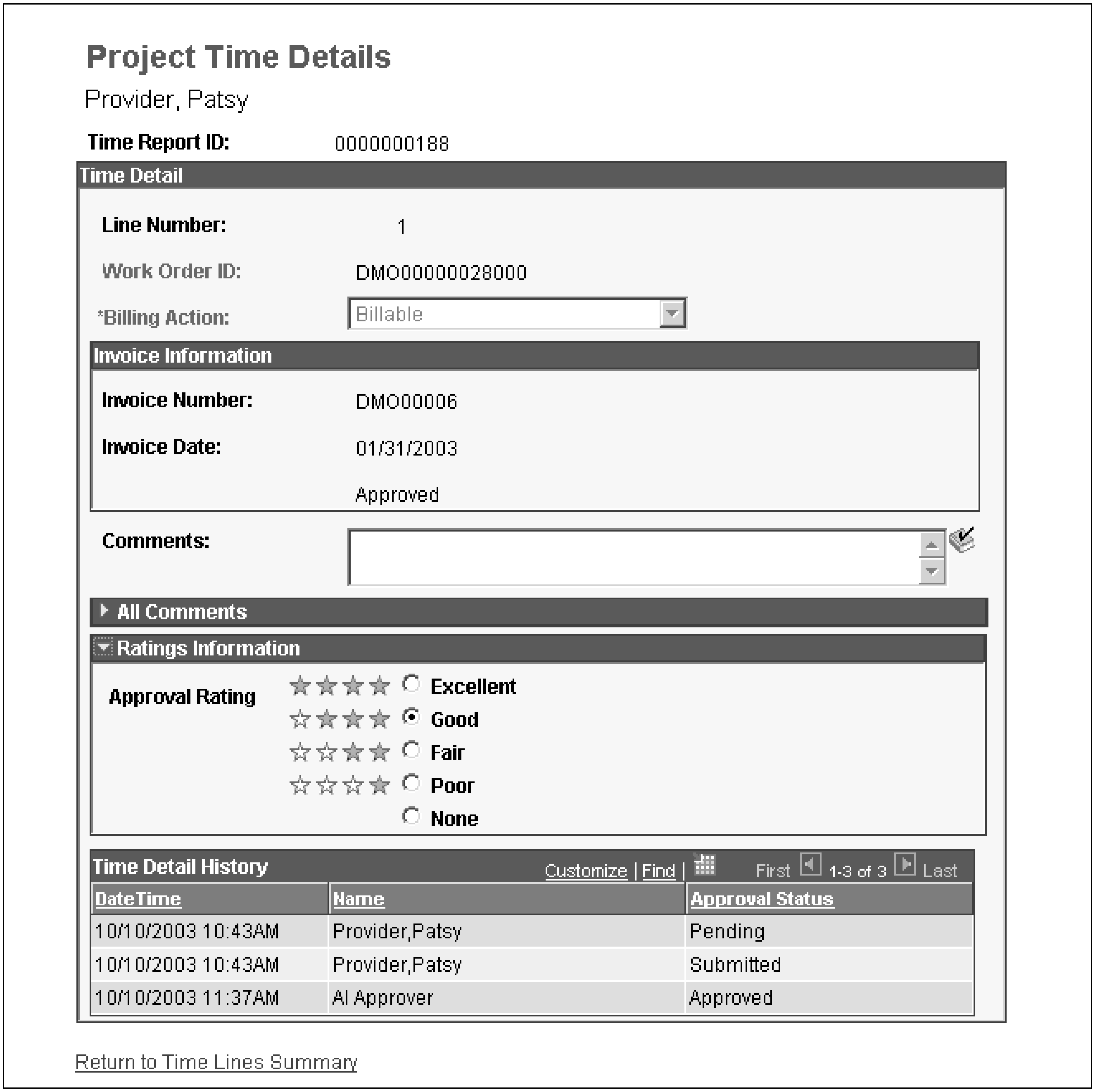
Note. Ratings are only allowed if they are enabled for the business unit. The service provider cannot view his ratings.

3. Click Add Expense to view expenses.
4. Click TRC Breakdown to view the breakdown of hours.

Note. TRC Breakdown is only available for timesheets that allow overtime.

Entering or Viewing Project Time Details

Access the Project Time Details page.



Project Time Details page

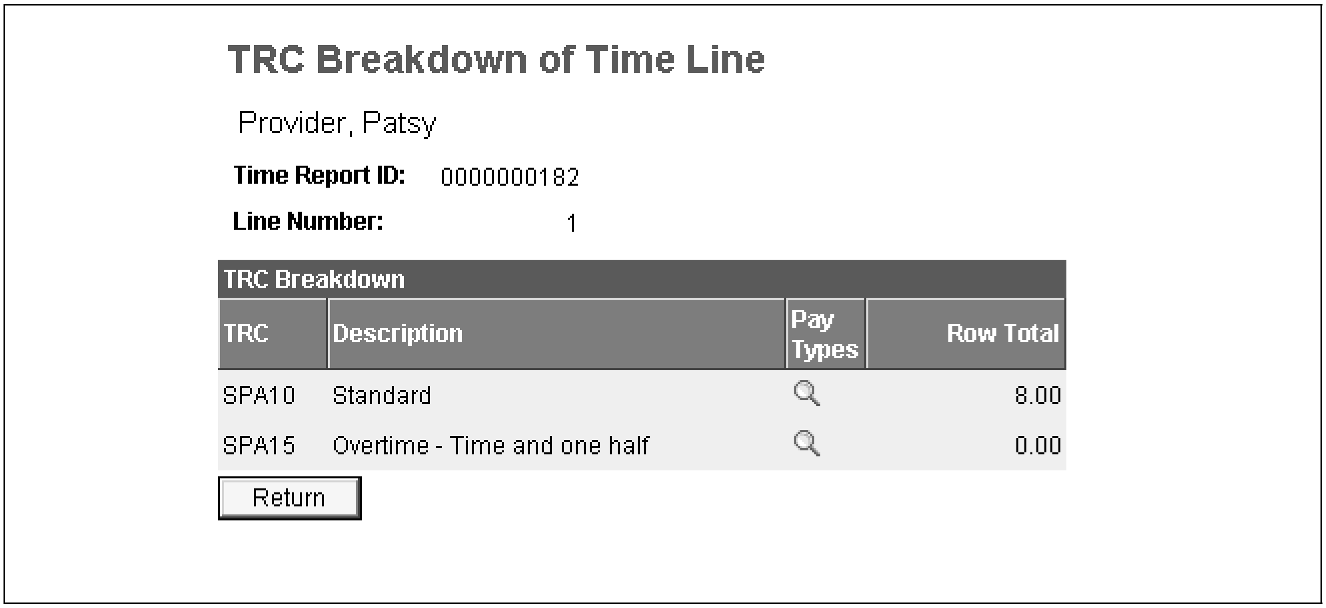
Work Order ID	Value is populated after saving the row on the Time/Expense Summary page.
Invoice Status, Invoice Date, and Invoice Number	Values are populated after the timesheet line is included on an invoice.
Billing Action	Displays *Billable* or *Nonbillable*.
Comments	The approver can enter comments regarding the time line.
Ratings	The approver can enter the rating for the work that the service provider performed for this time line.

Note. Ratings are available only if they are enabled for the Services Procurement Business Unit.

Time Detail History Chronological history of the time line.

TRC Breakdown of Time Line

Access the TRC Breakdown of Time Line page.



TRC Breakdown of Time Line page

Displays the time reporting code for each day of the week and the total hours for each week.

Note. TRC breakdowns are only available for timesheets that allow overtime.

Approving or Denying Time/Expense Sheets

You can approve time/expense lines as follows:

1. Access the Project Time Details page.
2. Add Comments for this time/expense line.
3. Choose a Rating for the work the service provider performed for this project. This rating is captured for performance metrics by Services Procurement Analysis. The ratings are only available if they are enabled on the Services Procurement Business Unit.
4. Click one of the following buttons to designate the approval status of this time/expense line:

Button	Approval Status
Approve	Changes status to *Approved*. The timesheet is now available for invoicing.

Button	Approval Status
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 *Hold by Approver*.

When all lines are approved, the time/expense sheet status changes to *Approved*.

Note. For Approvers, on the Summary page the Status displays for each line instead of the work order.

Mass Approving Time and Expense Sheets

You can approve multiple time and expense sheets as follows:

1. Access the Manage Time/Expense Sheets page.
2. Select the timesheets to be approved.

   Note. This option displays for users with a role action of *SP_TIME_APPROVER* only.

3. Click the Approve Selected Timesheets button. The system changes the status of the selected timesheets to Approved.

   Note. When approving multiple timesheets, the default approval rating on the Services Procurement Business Unit Options page defaults onto all approved timesheets.

You can approve multiple time and expense sheet lines as follows:

1. Access the Time Lines Summary page.
2. Select the lines that are to be approved.
3. Click the Approve Selected Time Lines button.

   Note. When approving multiple timesheet lines, the default approval rating on the Services Procurement Business Unit Options page defaults onto all approved timesheet lines.

See Also

Chapter 3, “Implementing Your PeopleSoft Services Procurement System,” Setting Up Business Units, page 25

Adjusting Approved Time/Expense Sheets

Complete the following steps to adjust approved time/expense sheets.

1. Access the Time/Expense Summary page.
2. Click Adjust Time/Expense to adjust a sheet.
3. Adjust the Project ID, Work Order ID, Activity ID, and Time fields as required.

4. Click Detail to adjust the Billing Action.
5. Click Expense link to adjust the expense information.

When one line is adjusted, the time/expense sheet status changes to *Adjusted.* If an the adjusted timesheet line was included in an invoice the original invoice line status changes to *Cancelled,* and the invoice header status changes to *Adjusted*.

Time lines with a status of *Adjusted* are eligible for invoicing.

Note. Only users with the role action of *SP_TIME_APPROVER* can adjust time/expense sheets. A new expense report cannot be added through a time/expense sheet adjustment. Time/Expense sheets can also be adjusted prior to approval in submitted status by the approver. When these are adjusted, the status remains as submitted.

Manage Time and Expense Sheet Worklists

This section describes how to manage worklists for time and expenses

Triggering Worklist and Email Notifications

The following status changes trigger a worklist entry and an email notification:

- The service provider receives a worklist entry and an email notification if the timesheet status changes to *Approve* or *Deny*.
- The approver receives a worklist entry and an email notification when a timesheet is submitted.
- The user can either access the timesheet using the email link shown below, or by navigating using the worklist.

The email notification contains values from the Time/Expense Summary page, and a URL for the recipient to navigate to the timesheet.

CHAPTER 15

Managing Progress Logs

This chapter provides an overview of services progress, describes the prerequisite tasks required to enter progress logs, and discusses how to:

- Create progress logs.
- Manage progress logs.

Understanding Progress Logs

The progress log is similar to the timesheet in function and process. The service provider uses the progress log to record and submit progress on deliverables 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.

You 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 your criteria in the service provider, vendor, or status fields.
- Access pages used to modify progress log details.

See Also

“Preface,” Common Elements Used In This PeopleBook, page xxiv

Prerequisites

These attributes must be set up before entering progress log information:

- Services project business units.
- Services templates.
- Activities defined as milestone activities.
- Activities defined for rate based services.

A work order must also be released before progress log transactions can be entered against it.

See Also

Chapter 3, “Implementing Your PeopleSoft Services Procurement System,” page 21

Chapter 13, “Managing Work Orders,” page 175

Creating Progress Logs

This section discusses how to:

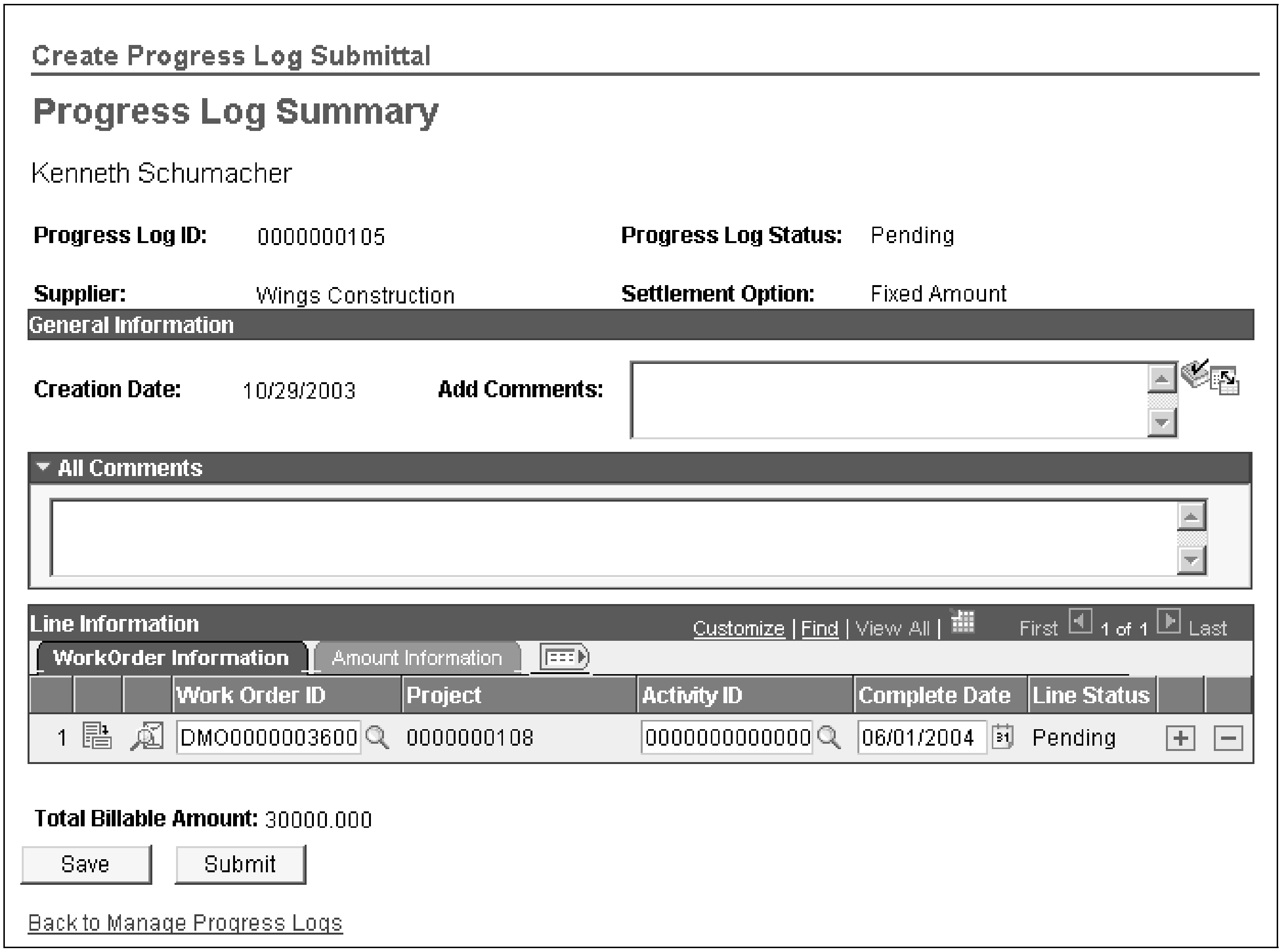
- Create a progress log.
- Enter progress completed on a project.
- View progress log details.
- View progress log history.

Pages Used to Create Progress Logs

Page Name	Object Name	Navigation	Usage
Maintain Progress Log	SPA_MANAGE_PLOGS	• Services Procurement, Maintain Services Progress Logs (internal) • Maintain Services Progress Log (external)	View and manage progress logs.
Progress Log Summary	SPA_PLOG_LINES	• Click the Progress Log ID link from the Maintain Progress Logs page. • Click the Addbutton from the Maintain Progress Logs page.	Create or edit a progress log.
Progress Log Details	SPA_PLOG_DTL	 Click the Details button from the Progress Log Summary page.	View invoicing status and project comments. Approve, deny, or hold submitted progress logs. View status change history
Currency Information	EXCH_RT_DTL_INQ	Click the 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 from the Progress Log Summary page.	View previously entered progress logs by work order.

Creating a Progress Log

Access the Progress Log Summary page.



Progress Log Summary page

The fields appearing on this page depend on the settlement option defined on the work order.

Common Elements

Add Comments	Enter comments or concerns for the work order.
Work Order ID and **Project**	Select the work order for which progress is being reported. The project associated with the work order appears as read-only.
Billable Amount and **Total PO 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	Sum of the Billable Amounts appearing on this page.
Save	Click to save the progress log entry for later submission.

Submit — Click to submit the progress log for approval. Your information is automatically submitted to the approver specified for your work order and you can return to the Maintain Progress Logs page.

Milestone Settlement Method

These fields appear if you are using a service template with *Milestone* specified for the Settlement Options. The settlement option 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 (percent of work order complete) — The system displays this information based on information from the work order.

Fixed Amount Settlement Method

These fields appear if you are using a service template with *Fixed Amount* defined for 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 supplier 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 ID — Select a milestone activity that is linked to the project defined on the work order.

Note. Unlike the Milestone Settlement Option, milestone activities can be recorded multiple times with the Fixed Amount Settlement Option.

Complete Date — Enter the date the activity 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 Options as defined on the work order.

% Complete (percent complete) — Enter the percentage value completed.

% Complete TD (percent complete to date) — The system 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 PO Amount on the work order plus the tolerance percentage defined on the work order.

Warning! After you submit the progress log for approval, you can't go back and add progress lines for the work order, project, and milestone activity combination using the same service template.

Rate Based Settlement Method

These fields appear if you are using a service template with *Rate Based* defined for Settlement Option. The settlement option is defined on the work order.

Activity ID — Select the activity that you performed. After you select the activity, the rate, UOM and billable amount for the activity are displayed on the page. These fields come from the work order activity definition.

Quantity — Enter the quantity worked.

Entering or Viewing Progress Log Details

Access the Progress Log Details page.

Invoice Status, Invoice Date, and **Invoice Number** — Values are populated after the progress log is included on an invoice.

Managing Progress Logs

In this section, we discuss how to:

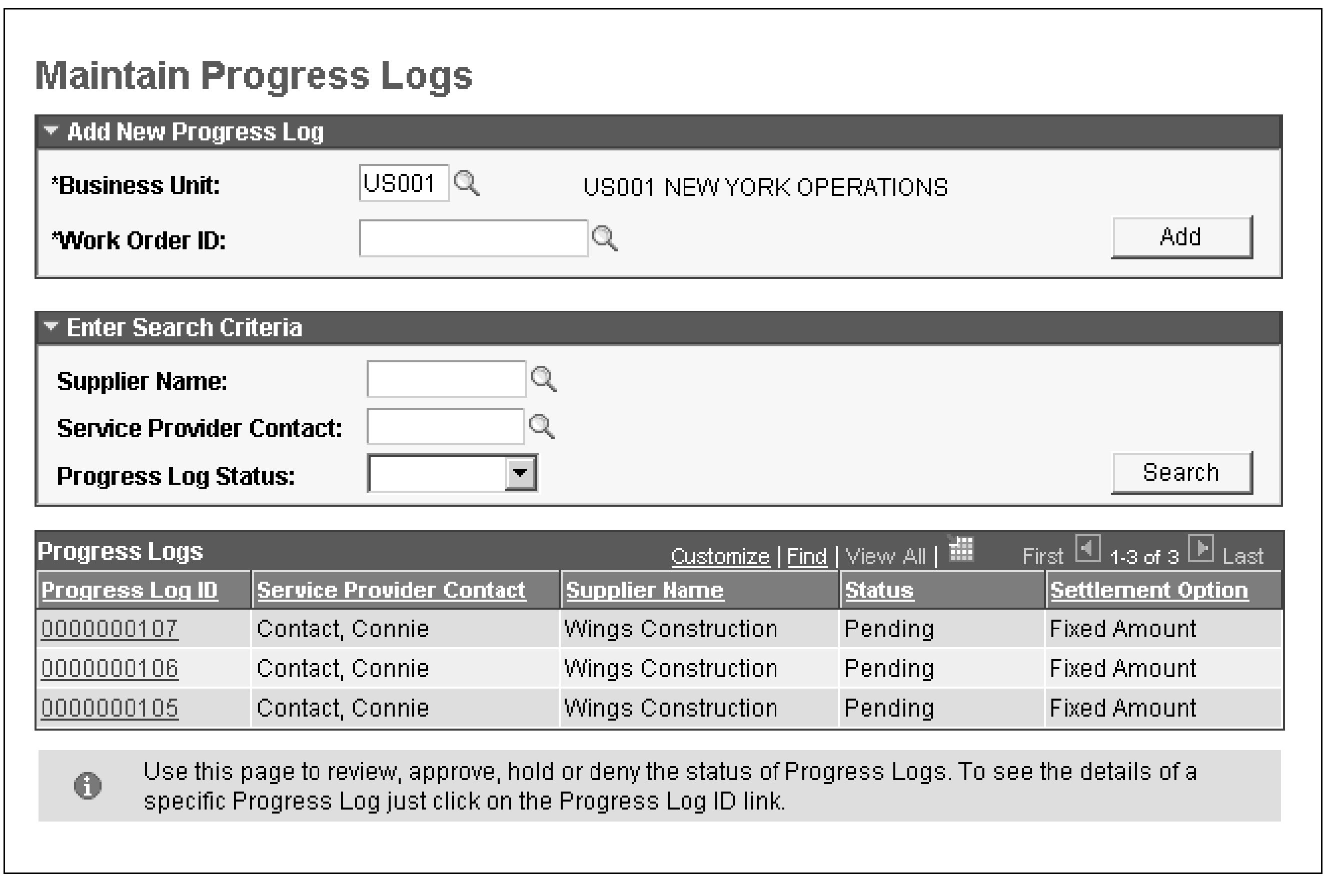
- Manage progress logs.
- Submit progress logs for approval.
- Approve or deny progress logs.
- Trigger worklist and email notifications.

Pages Used to Manage Progress Logs

Page Name	Object Name	Navigation	Usage
Maintain Progress Logs	SPA_MANAGE_PLOGS	Services Procurement, Maintain Services Progress Log	Search and view progress logs. Access the progress log you want to modify.
Progress Log Summary	SPA_PLOG_LINES	Click the Progress Log ID link from the Maintain Progress Logs page.	Modify progress logs.
Progress Log Details	SPA_PLOG_DTL	 Click the Details button from the Progress Log Summary page.	Modify progress log details. Approve, deny, or hold submitted progress logs.
Progress Logs by Work Order	SPA_PLOG_PRCNT_HST	 Click the History button from the Progress Log Summary page.	View previously entered progress logs by work order.

Maintaining Progress Logs

Access the Maintain Progress Logs page.



Maintain Progress Logs page

Search and Progress Logs

Enter your search criteria and click Search. The search results appear at the bottom of the page.

Roster

Progress Log ID Click the link to access the Progress Log Summary page.

Submitting Progress Logs for Approval

To submit progress logs for approval, complete the following:

1. Access the Progress Logs Summary page.
2. Click Submit.
3. Click OK on the Submit Confirmation page.

Approving or Denying Progress Logs

To approve progress logs, complete the following:

1. Access the Progress Log Details page.
2. Click one of the following buttons to designate the approval status:

Button	Approval Status
Approve	Changes status to *Approved*. If more than one approver is required, the approve action changes the status to *Partial*.
Deny	Changes status to *Denied by Approver*.
Hold	Changes status to *Hold by Approver*.

3. You can also do mass approvals of progress logs using the Maintain Services Progress Log page by checking the select check box and clicking the Approve button.

When all lines are approved, the Progress Log Status changes to *Approved*.

Note. For Approvers, on the Summary page the Status appears for each line.

Triggering Worklist and Email Notifications

The following status changes trigger a worklist entry and an email notification:

- The service provider receives an email notification if status changes to *Approve*, *Deny,* or *Hold*.
- The service provider receives a worklist entry if status changes to *Deny.*
- The approver receives a worklist entry and an email notification when a progress log is submitted.

The email notification contains values from the Progress Log Summary page and a URL for the recipient to navigate to the progress log.

CHAPTER 16

Managing Settlements

This chapter provides an overview and describes how to:

- Create invoices manually.
- Generate and print invoices automatically.
- Manage invoices.
- Approve invoices.

Understanding Settlements in PeopleSoft Services Procurement

Managing settlements with PeopleSoft Services Procurement enables individuals who have appropriate permissions to create consolidated proforma invoices. Proforma invoices can be optionally configured to include or exclude suppliers in the invoice approval process. Specific timesheets or progress logs lines can be added or removed prior to submitting the invoice for approval. Once approved, the proforma invoice is viewed online and printed and/or included in a file for export.

You can grant permissions for each of the following functions:

- Automatic invoice generation.
- Manual invoice creation.
- Invoice management.
- Invoice approval.
- Supplier Invoice approval.
- Invoice printing and processing.

With Services Settlement, you can:

- Manage the invoicing and settlement process.
- Invoice at varying frequencies.
- Verify that the invoice meets the terms defined by the statement of work and/or purchase order.
- Match the service provider’s approved timesheet to an invoice.
- Manage invoice submittal, approval, and processing.

See Also

"Preface," Common Elements Used In This PeopleBook, page xxiv

Prerequisites

These attributes must be set up before invoicing a timesheet or progress log:

- Define invoice authorizations.
- Define whether suppliers are included in the invoice approval process.
- Define addresses.
- Define payment terms.
- Define accounts payable interface.

Creating Invoices Manually

This section discusses how to create invoice header information.

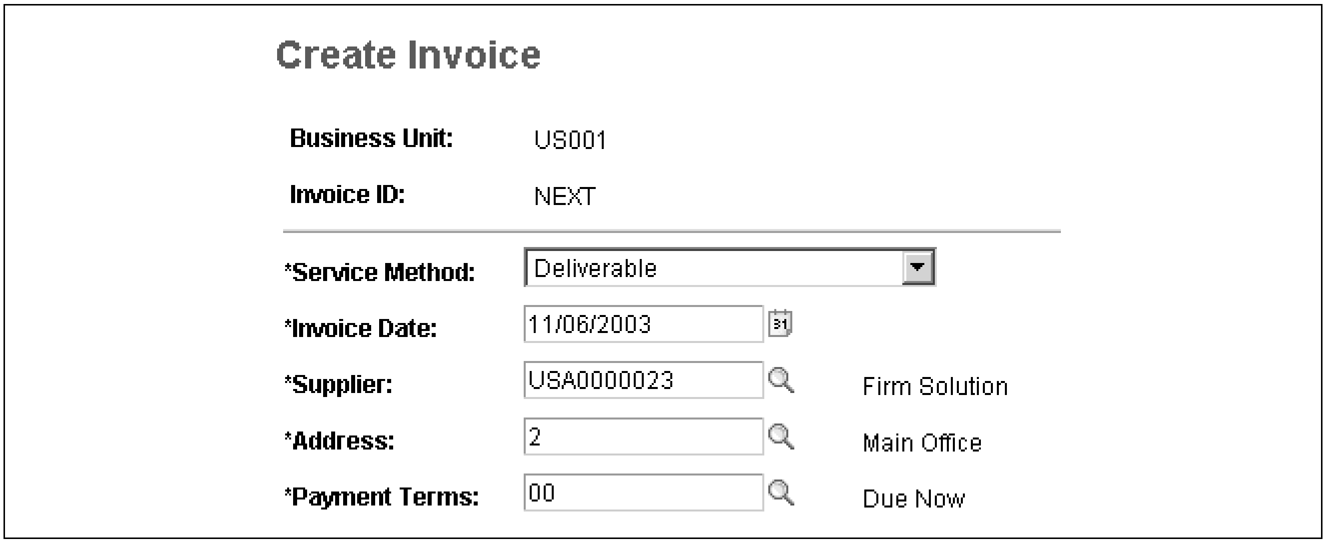
Pages Used to Manually Create an Invoice

Page Name	Object Name	Navigation	Usage
Manage Invoice	SPF_INV_MANAGE	Services Procurement, Manage Invoices	Search and add invoices.
Create Invoice	SPF_INV_HDR_ADD	Enter Business Unit and/or Invoice ID and click the Add button on the Manage Invoices page.	Create invoice header information.
Available Lines for Invoicing	SPF_INV_TE_DTLS	Save an invoice on the Create Invoice page.	Displays all uninvoiced timesheets 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.
Vendor Address	SPF_ADDRESS	Click the Vendor Address button on the Invoice Process Detail page.	View the vendor address.
Invoice Process Detail	SPF_INV_PROCES_DTL	Click the Details button on the Manage Invoice page or the Manage Invoices - Line Summary page.	View invoice details.

Page Name	Object Name	Navigation	Usage
Currency Information	EXCH_RT_DTL_INQ	Click the linked currency abbreviation on the Manage Invoices - Line Summary page.	View multicurrency information.
Work Order Details	SPF_WO_REQ_VEN_DT	Click a linked work order on the Manage Invoices - Line Summary page or Manage Invoices - Line Details page.	View details of the work order related to the invoice.
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 and/or make adjustments.
Manage Invoices - Line Detail	SPF_INV_PLOG_DTL	For deliverable based invoices, click the Progress Log link on the Manage Invoices - Line Summary page.	View invoice line details and/or make adjustments.
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 Time/Expense - Time/Expense Summary	SPA_TIME_LINES	For resource bases invoice, click the linked timesheet on the Manage Invoices - Line Details page.	View time reports.
Create Progress Log Submittal - Progress Log Summary	SPA_PLOG_LINES	For deliverables based invoice, click the linked progress log on the Manage Invoices - Line Details page.	View time reports.

Creating an Invoice

Access the Create Invoice page.



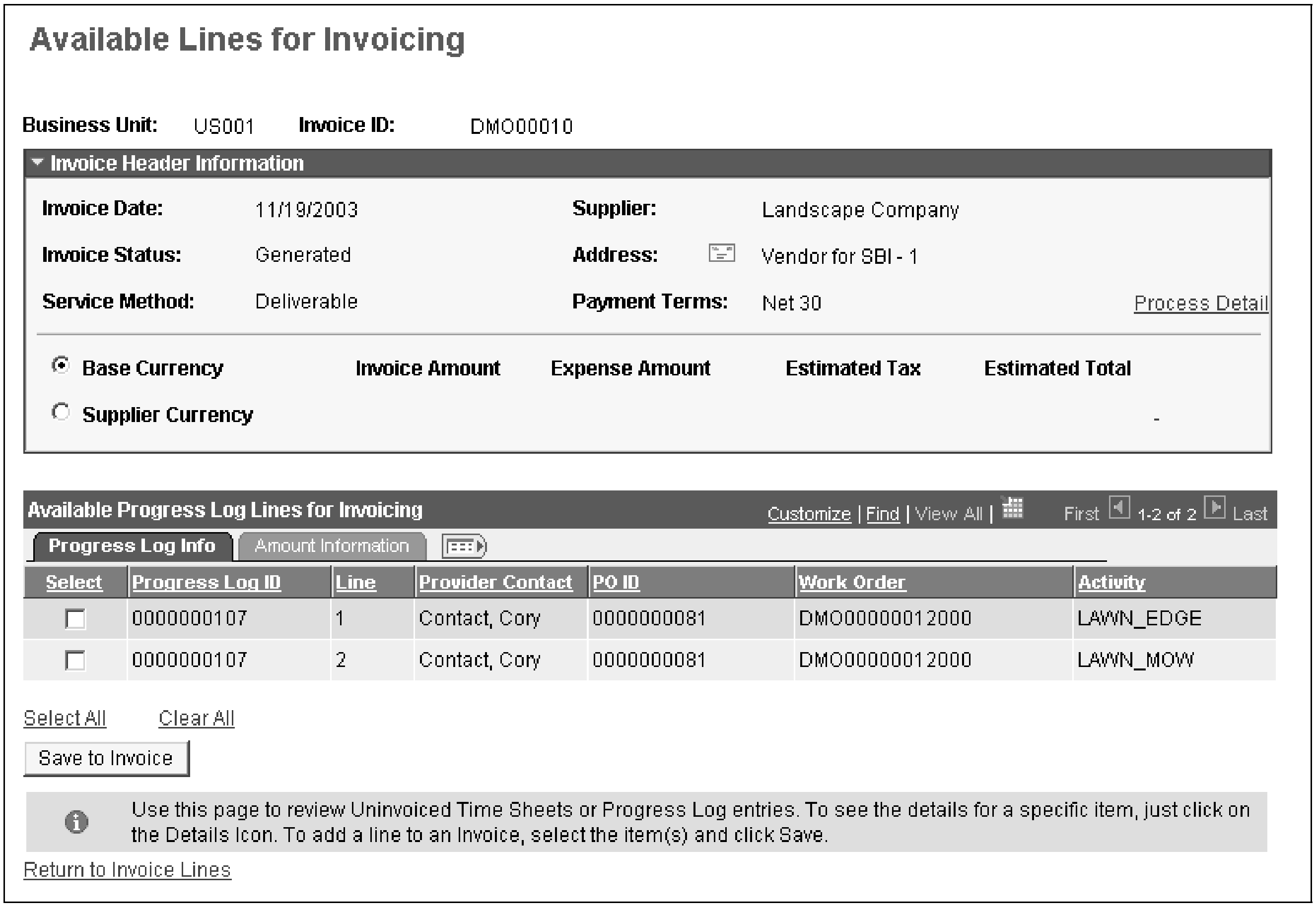
Create Invoice page

Service Method Select from *Deliverable* or *Resource.* The selected Service Method determines the fields that appear on the invoicing pages.

Payment Terms Select a payment term from the available values defined on the Single Payment Terms page.

Available Lines for Invoicing

Access the Available Lines for Invoicing page.



Available Lines for Invoicing page

Select the progress log or time report lines to include in the invoice.

Generating and Printing Invoices Automatically

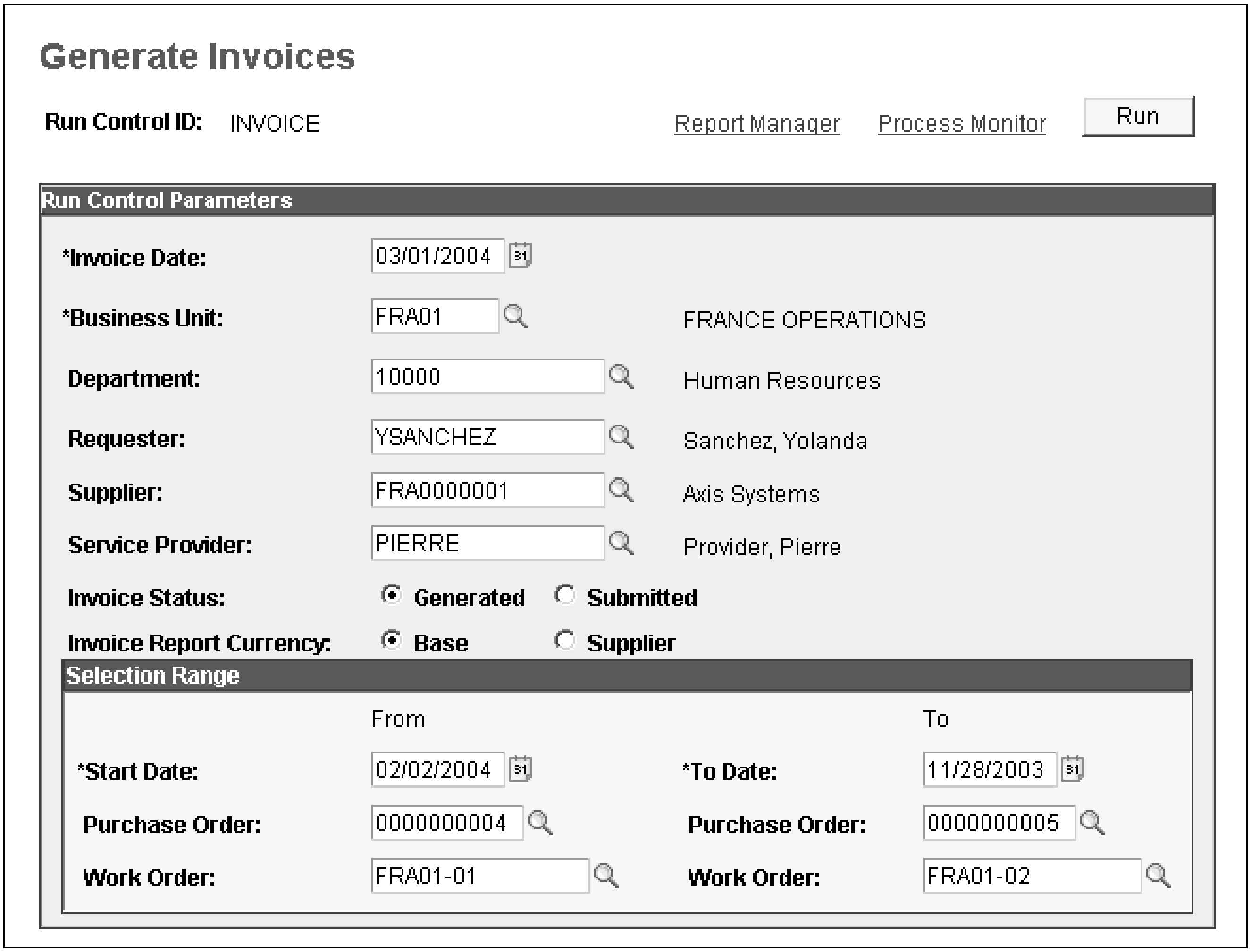
This section discusses how to generate invoices automatically.

Pages Used to Automatically Generate and Print Invoices

Page Name	Object Name	Navigation	Usage
Generate Invoice	SPF_GEN_CLINV	Service Procurement, Services Settlement, Create Batch Invoices	Generate invoice for printing.
Print Invoices	SPF_GEN_CINP	Service Procurement, Services Settlement, Print Invoices	Print invoices that you've generated.

Generating Invoices

Access the Generate Invoices page.



Generate Invoices page

Enter the run control parameters for the invoice process.

Invoice Date	Enter the create date of the invoices. Defaults to the system date.
Business Unit	Select the Business Unit for which invoices are generated.
Department	Select the Department for which invoices are generated.
Requester	Select the Requester for whom invoices are generated.
Supplier	Select the Supplier ID for whom invoices are generated.
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 deliverable based, the lookup for service providers displays provider contacts.

If the Supplier is both resource and deliverable based, the lookup for service providers displays both service providers and provider contacts.

Invoice Status Select if the invoices are generated with a status or *Generated* or *Submitted*.

Note. Invoices generated as submitted with automatically be submitted to either the supplier invoice approval

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Invoice Report Currency Select if the invoice should be created in the *Base* currency or the *Supplier* currency. The field is disabled if the Purchasing Business unit does not allow multicurrency purchase orders.

Start Date and To Date Enter the work order start and end dates for invoices you wish to generate.

From Purchase Order and To Purchase Order Enter the beginning and ending purchase orders for which you wish to generate invoices.

From Work Order and To Work Order Enter the starting work order for which you wish to generate invoices. The lookup filters using the start and to dates entered above.

Process Results

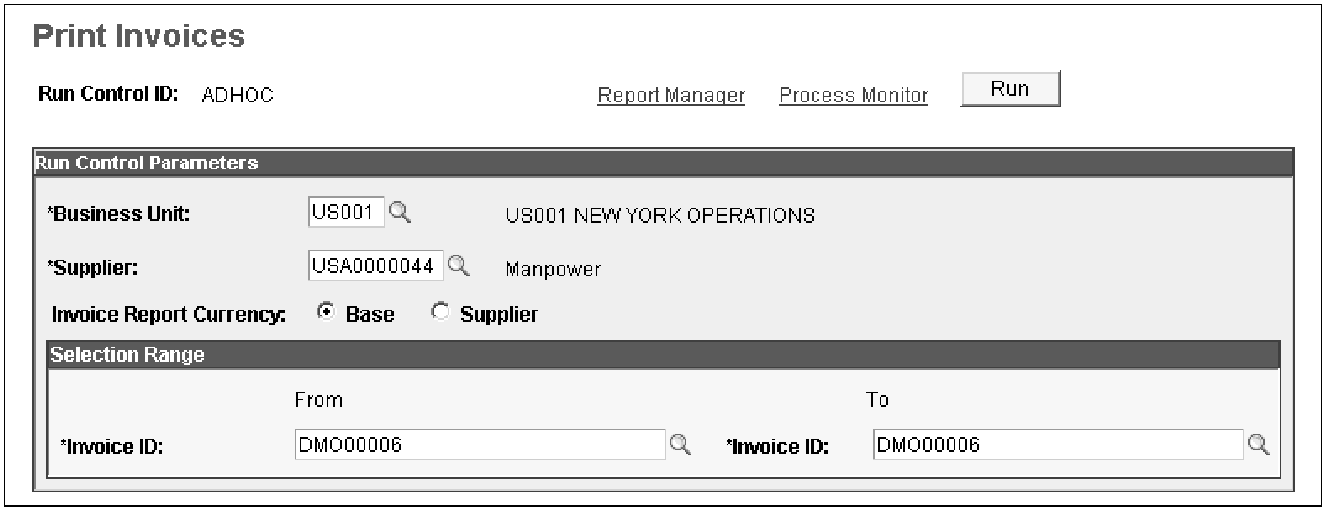
The Generate Invoices process (SPF_INVGEN_C) is a PeopleSoft Application Engine process.

When you create an invoice for a work order that allows overtime entry, the system performs the overtime calculation during this process. The system validates that the Time Template associated with the work order is enabled for Use Overtime and also references the overtime calculation rules you defined on the Overtime Rules page. The resulting invoice amount includes the overtime calculation based on the selected Time Reporting Code for a time/expense line.

Note. You can also run the Generate Invoice Report process (SPINV002) to generate a report about the invoices you are processing.

Printing Invoices

Access the Print Invoices page.



Print Invoices page

Enter the run control parameters for the invoice printing process.

Invoice Report Currency Select to print in either the Base or Supplier currency. The field is disabled if the Purchasing Business unit does not allow multicurrency purchase orders.

From and To Invoice ID Select the range of invoices you would like to print.

Process Results

Process Invoice (SPF_PRNTINV) is a PeopleSoft Application Engine that processes invoices that have been generated and approved. It prints the proforma 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, review existing invoices, edit, view their status, cancel, or submit selected invoices for approval. The Manage Invoice page is the central location and starting point for maintaining your invoices. Use the Search and sort features to streamline the search results. Once entered, proceed to the roster area where you can view invoice details, edit and cancel invoices.

Note. This page displays invoices created by the login user. Invoices generated by other users do not appear in this roster.

In this section, we discuss how to:

- Search and view invoices.
- View and edit invoice details.

See Also

Chapter 16, “Managing Settlements,” Creating Invoices Manually, page 238

Pages Used to Manage Invoices

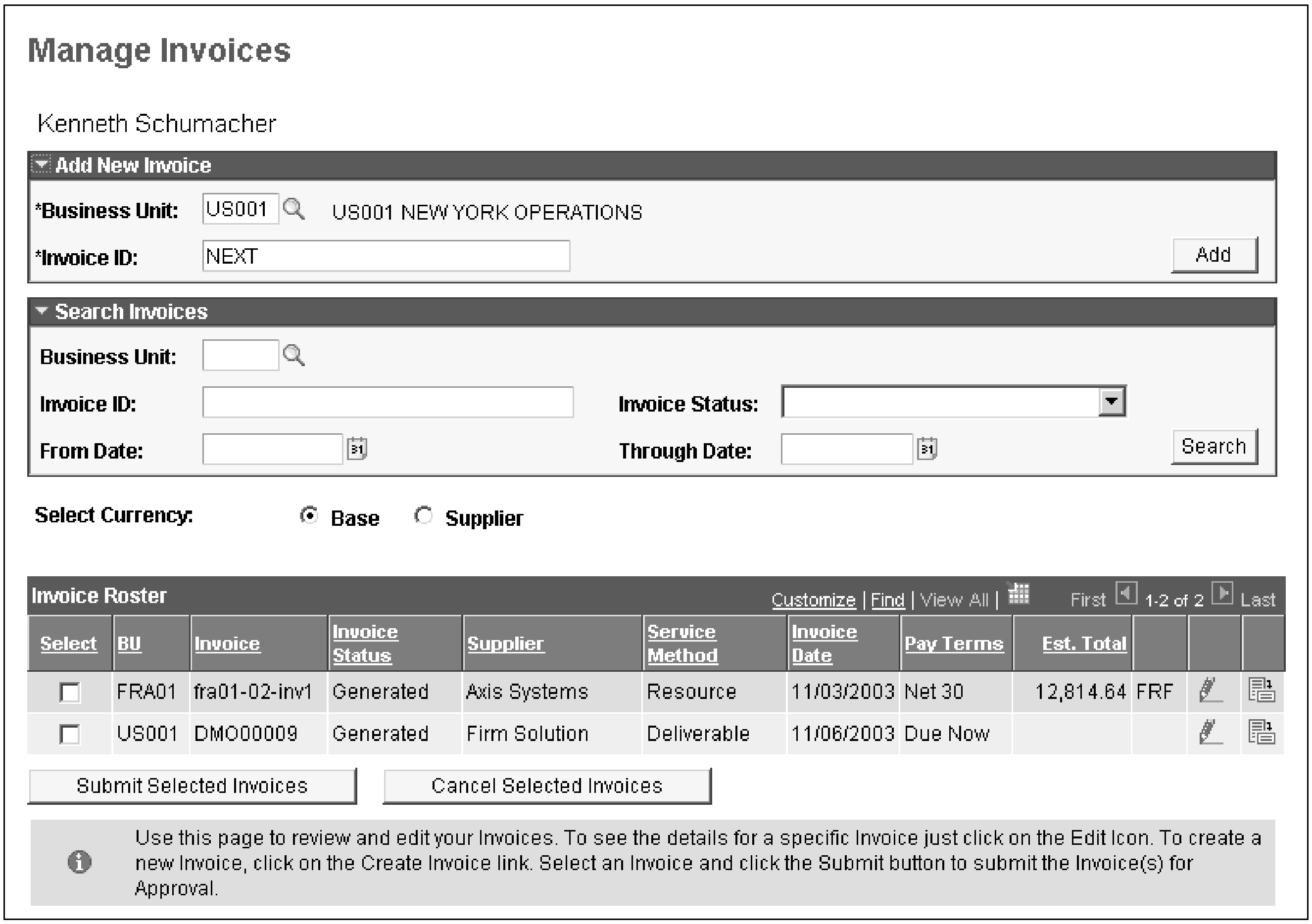
Page Name	Object Name	Navigation	Usage
Manage Invoices	SPF_INV_MANAGE	Services Procurement, Manage Invoices	Search and add invoices.
Create Invoice	SPF_INV_HDR_ADD	Enter Business Unit and/or Invoice ID and click the Add button on the Manage Invoices page.	Create invoice header information.
Available Lines for Invoicing	SPF_INV_TE_DTLS	Save an invoice on the Create Invoice page.	Displays all uninvoiced timesheets 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.
Vendor Address	SPF_ADDRESS	Click the Vendor Address button on the Invoice Process Detail page.	View the vendor address.
Invoice Process Detail	SPF_INV_PROCES_DTL	Click the Details button on the Manage Invoice page or the Manage Invoices - Line Summary page.	View invoice details.
Currency Information	EXCH_RT_DTL_INQ	Click the linked currency abbreviation on the Manage Invoices - Line Summary page.	View multicurrency information.
Work Order Details	SPF_WO_REQ_VEN_DT	Click a linked work order on the Manage Invoices - Line Summary page or Manage Invoices - Line Details page.	View details of the work order related to the invoice.
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 and/or make adjustments.
Manage Invoices - Line Detail	SPF_INV_PLOG_DTL	For deliverable based invoices, click the Progress Log link on the Manage Invoices - Line Summary page.	View invoice line details and/or make adjustments.
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 Time/Expense - Time/Expense Summary	SPA_TIME_LINES	For resource based invoices, click the linked timesheet on the Manage Invoices - Line Details page.	View time reports.

Page Name	Object Name	Navigation	Usage
Create Progress Log Submittal - Progress Log Summary	SPA_PLOG_LINES	For deliverables based invoice, click the linked progress log on the Manage Invoices - Line Details page.	View time reports.

Searching and Viewing Invoices

Access the Manage Invoices page.

You can access this page when you log in as the PeopleSoft Services Procurement invoice manager.



Manage Invoices page

Search Invoices

Enter search criteria used to retrieve and edit and view invoices.

Select Currency

Display amounts in either base or supplier currency. The select currency field is only available if Allow Multicurrency is selected on the Services Procurement business unit page.

See Chapter 3, "Implementing Your PeopleSoft Services Procurement System," Setting Up Business Units, page 25.

Note. Invoices are generated in both base and supplier currency. If the work order currency differs from the supplier currency, then the amounts are converted for the appropriate currency.

Estimated Total

Displays estimated total including expenses and estimated prorated tax.

Note. The SUT tax 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.

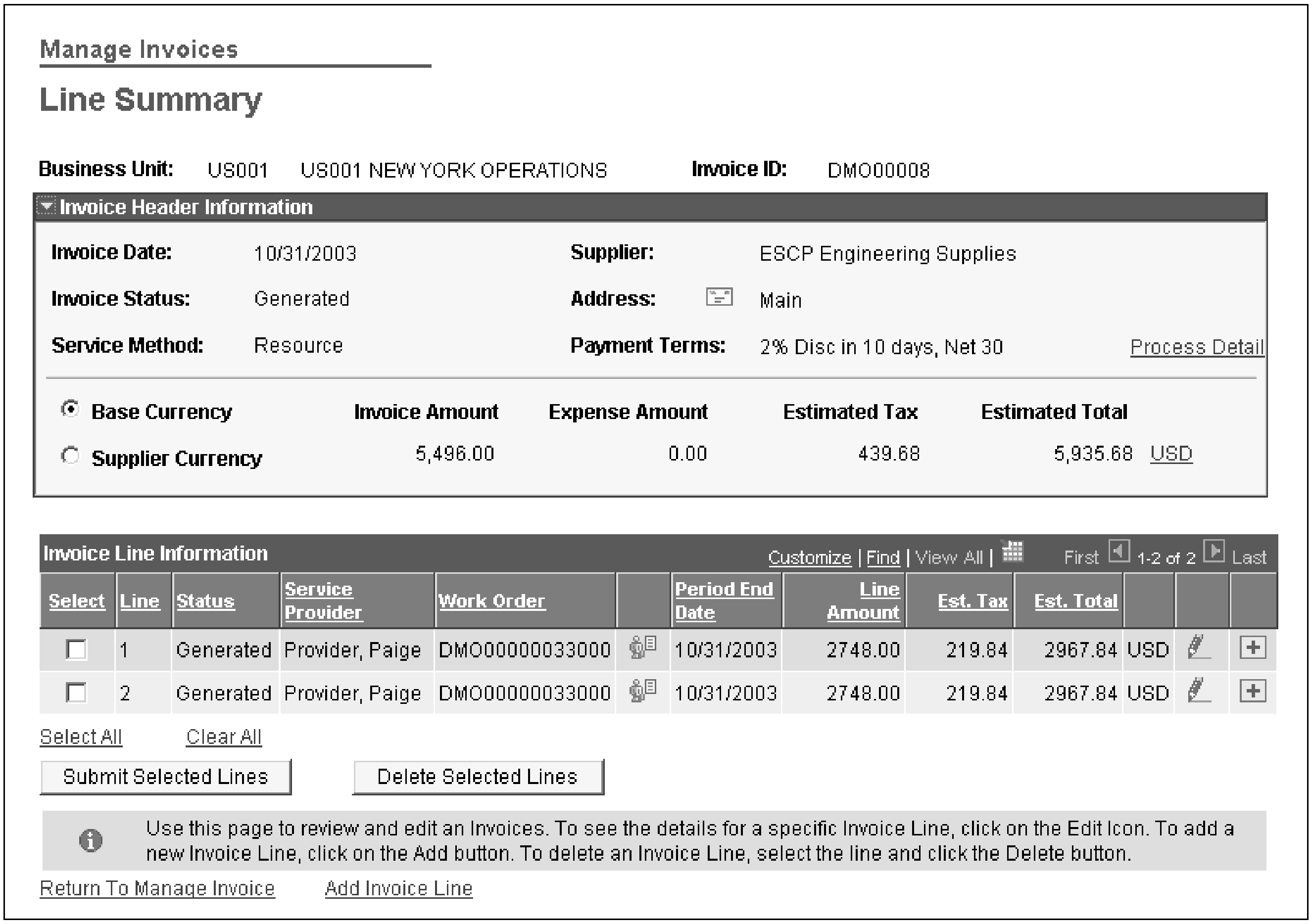
Roster

	Click the Edit button to access the Manage Invoice Lines page where you can review and edit Invoice lines.
	Click the Process Detail button to access the Invoice Process Detail page where you can review Invoice processing information.
Submit Selected Invoices	Click to submit selected invoices for approval.
Cancel Selected Invoices	Click to cancel selected invoices. Canceling invoices releases the timesheet or progress log associated with that invoice so that it can be invoiced again.

Note. Invoices can be adjusted by adjusting the associated Time/Expense sheets or Progress Logs. If the adjusted Time/Expense sheet or Progress Log is included in an invoice, the status of the invoice line associated to the adjustment is changed to *Cancelled* and the invoice header status is changed to *Adjusted*. Invoices can also be adjusted 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/Expense sheet or Progress Logs. Adjustments can be made prior to invoices being approved by either the Supplier Invoice Approver or the Enterprise Invoice Approver.

Viewing Manage Invoice Line Summary

Access the Manage Invoices Lines page.



Manage Invoices - Line Summary page

The data appearing in the Invoice Line Information grid depends on the selected Service Method. Select Base or Supplier currency option to display amount.

View the estimated tax and estimated total amount for the invoice.

Invoice Amount	Total invoice amount in base or supplier currency.
Expense Amount	Total expense amount in base or supplier currency.
Estimated Tax	Total estimated tax for the invoice.
Estimated Total	Estimated total for the invoice.
Submit Selected Lines	Click to submit the selected invoice lines for approval.

Note. Until all lines have been submitted for approval, the invoice header status remains as *Generated*.

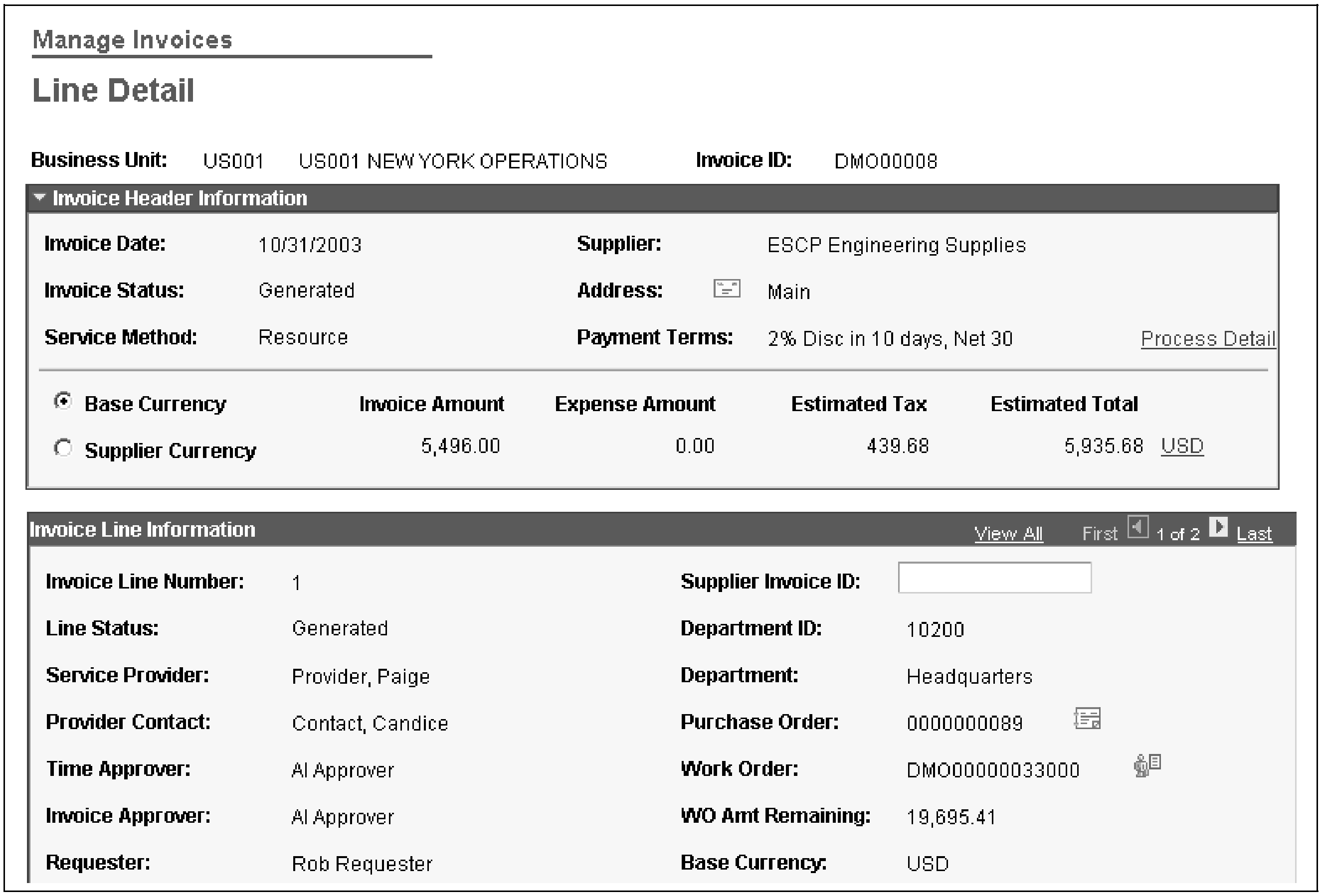
Delete Selected Lines	Click to remove the selected line from the invoice. Deleting the invoice line releases the timesheet or progress log associated with that invoice so it can be invoiced again.

Note. For deliverable based requisitions, the rate based activity is displayed in the Invoice Line Information section.

Click the Edit button to access the Invoice Summary page where you can view the summary of your invoice and enter any related comments or adjustments.

Viewing Invoice Line Detail

Access the Manage Invoice - Line Detail page.



Manage Invoices

Line Detail

Business Unit: US001 US001 NEW YORK OPERATIONS Invoice ID: DMO00008

Invoice Header Information

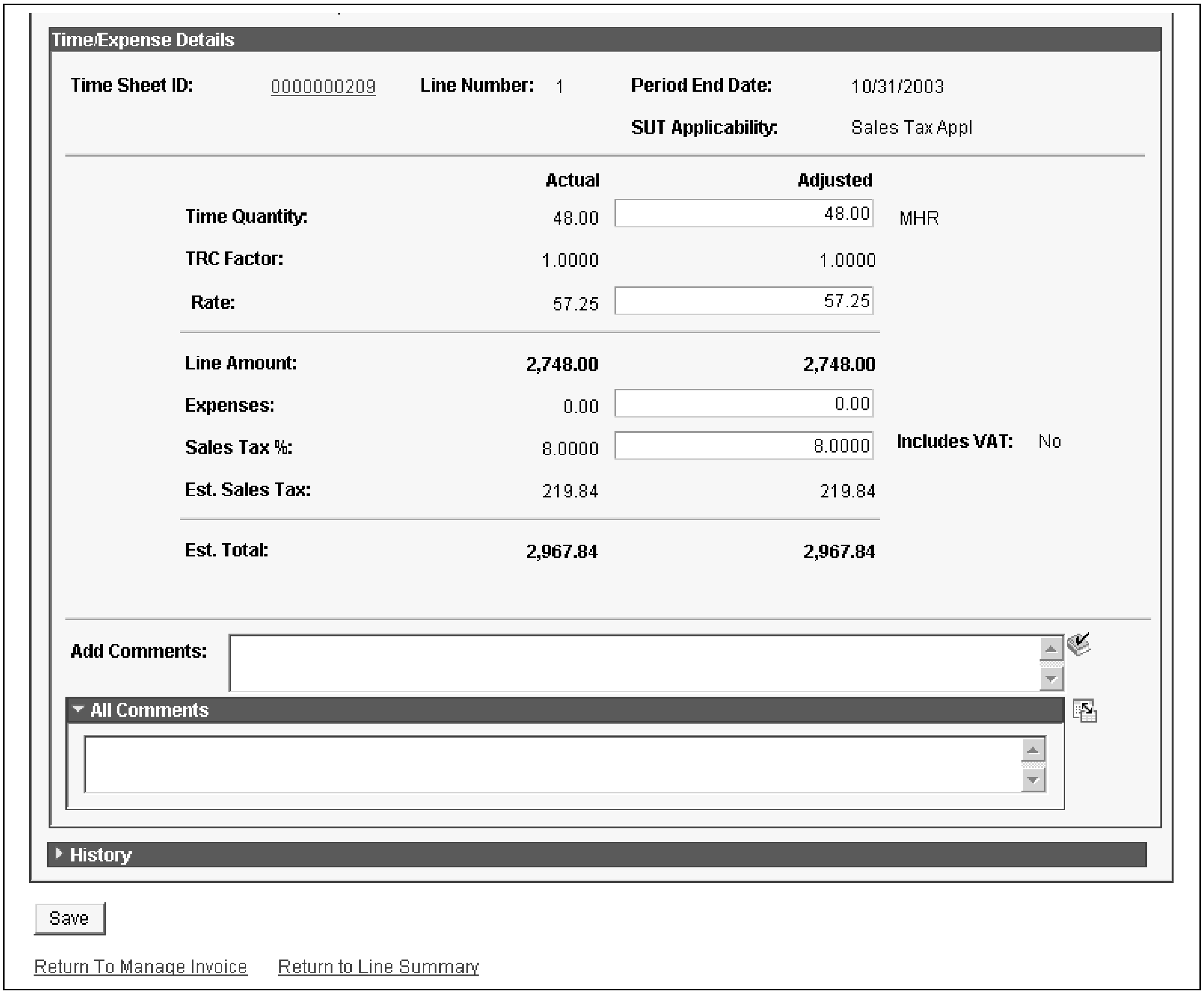
Invoice Date:	10/31/2003	Supplier:	ESCP Engineering Supplies	
Invoice Status:	Generated	Address:	Main	
Service Method:	Resource	Payment Terms:	2% Disc in 10 days, Net 30	Process Detail

	Invoice Amount	Expense Amount	Estimated Tax	Estimated Total
Base Currency				
Supplier Currency	5,496.00	0.00	439.68	5,935.68 USD

Invoice Line Information — View All First 1 of 2 Last

Invoice Line Number:	1	Supplier Invoice ID:	
Line Status:	Generated	Department ID:	10200
Service Provider:	Provider, Paige	Department:	Headquarters
Provider Contact:	Contact, Candice	Purchase Order:	0000000089
Time Approver:	Al Approver	Work Order:	DMO00000033000
Invoice Approver:	Al Approver	WO Amt Remaining:	19,695.41
Requester:	Rob Requester	Base Currency:	USD

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.

Invoice Header Information

Business Unit The business unit associated with the invoice.

Invoice ID The number automatically assigned to the invoice when it is created.

Invoice Date The creation date of the invoice.

Supplier The supplier associated with the service provider who performed the services included on the invoice line.

Invoice Status The current status of the invoice:

Generated: Line has been created but not yet submitted for approval.

Submitted: Invoice has been submitted for approval, but the line has not yet been approved or rejected.

Submitted to Supplier: 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.

Approved by Supplier: The supplier has approved all lines, and the invoice has not been processed.

Approved: The invoice approver has approved all lines, and the invoice has not been processed.

Processed: All lines have been approved and the invoice has been processed.

*Canceled:*invoice has been canceled and the related timesheets or progress logs have been released to be reinvoiced.

Click the Vendor Address button to access the Vendor Address page where you can view vendor address information.

Payment Terms The payment terms assigned to the invoice.

Estimated Total The total invoiced amount.

Invoice Line Details

Invoice Line Number The number automatically assigned to the invoice line when it is created. Allows adjustments to progress log line amount.

Supplier Invoice ID Enter the supplier’s invoice ID for each invoice line. This field is for reference only in the event the supplier uses a different invoice ID.

Line Status The current status of the invoice line:

Generated: Line has been created but not yet submitted for approval.

Submitted: Invoice has been submitted for approval, but the line has not yet been approved or rejected.

Submitted to Supplier: 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.

Approved by Supplier: The Supplier has approved all lines.

Approved: The invoice approver has approved all lines.

Service Provider The name of the individual service provider associated with the services included on the invoice line.

Department The department assigned to 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.

Click to view the purchase order assigned to the work order associated with the services included on the invoice line.

Note. The button is only available if the PO Work Order Integration check box is selected on the Services Procurement Installation Options.

Time Approver

Displays the time approver assigned to the work order associated with the services included on the invoice line.

Click to view the work order associated with the services included on the invoice line.

Invoice Approver

Displays the invoice approver assigned to the work order associated with the services included on the invoice line.

Requester

The requester assigned to the work order associated with the services included on the invoice line.

Work Order Amount Remaining

Displays the amount still available for the work order. This amount is updated when invoices are approved.

Base/Supplier Currency

Depending on the display currency selected from the Invoice Header Information, the appropriate currency code is displayed.

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 and **Progress Log ID**

The timesheet or progress log associated with the invoice line. Click to view the timesheet or progress log details.

Period End Date

The period end date of the timesheet associated with the invoice line.

VAT Applicability

Indicates if VAT applies to this invoice. If VAT Applicability is *Taxable*, the system displays the VAT% and VAT Amount information.

SUT Applicability

Indicates if Sales/Use Tax applies to this invoice. If SUT Applicability is *Sales Tax* or *Direct Pay/Sales Tax*, then the Sale Tax % and Sales Tax Amount fields display.

If the value is *Use Tax*, then the system displays Use Tax% and the Use Tax Amounts.

Note. Suppliers can only view the sales tax and not the use tax.

Time Quantity

Enables you to adjust the actual time quantity for resource-based invoices. Hidden if Supplier Rate Breakdown applies.

TRC Factor

This is the multiplication factor attached to the TRC code on the time line. The system uses this value to multiply against the Adjusted Rate.

Rate Rate for the invoice. Rate is adjustable unless Supplier Rate Breakdown applies. If Rate Breakdown applies, then click the Rate Detail link for the Rate Breakdown details. Suppliers are not able to adjust the rates.

Actual/Adjusted Line Amount The amounts based on the actual and adjusted hours and rates.

Actual/Adjusted Expenses Actual expenses from the timesheet associated with the invoice line. You can enter adjustments prior to approval.

Actual/Adjusted Total The total of the actual/adjusted line amount, the actual/adjusted expenses and any associated taxes.

VAT% 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.

Est. VAT Tax Estimated VAT amount. Adjusting the time quantity, rate or VAT % recalculates the estimated VAT amount.

Note. The field is hidden if VAT is not applicable.

Sales Tax % / Use Tax % 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. Enables you to adjust the tax percentage which recalculates the Estimated Sales/Use Tax amounts.

Includes VAT Indicates if the estimated VAT amount should be added to the line amount before sales or use tax is calculated. If yes, the VAT amount is added to the line amount before sales/use tax is calculated. Otherwise, the line amount is used for VAT calculations.

Note. The field is hidden if VAT is not applicable.

Est. Sales Tax Estimated sales tax. Enables you to adjust the estimated sales tax for resource-based invoices.

Est. Total Sum of line amount and VAT or sales tax.

Progress Log Details - Deliverables Based Invoices

Activity Activity associated with invoice line.

Note. This field is not visible if the settlement option on the work order associated to the invoice line is set to *Percentage*.

% Complete Total percent completed entered.

Note. This field is only visible if the settlement option on the work order associated to the invoice line is set to *Percentage*.

Rate The rate from the work order associated with the invoice line.

Note. This field is only visible if the settlement option on the work order associated to the invoice line is set to *Rate Based*.

UOM The Unit of Measure defined for the rate.

Note. This field is only visible if the settlement option on the work order associated to the invoice line is set to *Rate Based*.

Quantity The quantity is the number of units being billed on the invoice line.

Note. This field is only visible if the settlement option on the work order associated to the invoice line is set to *Rate Based*.

Actual/Adjusted Line Amount The amounts based on the actual and adjusted progress log for this invoice line.

Actual/Adjusted Total The total of the actual/adjusted line amount and any associated taxes.

VAT Applicability Indicates if VAT applies to this invoice. If VAT Applicability is *Taxable*, the system displays the VAT% and VAT Amount information.

SUT Applicability Indicates if Sales/Use Tax applies to this invoice. If SUT Applicability is *Sales Tax* or *Direct Pay/Sales Tax*, then the Sale Tax % and Sales Tax Amount fields display.

If the value is *Use Tax*, then the system displays Use Tax% and the Use Tax Amounts.

Note. Suppliers can only view the sales tax and not the use tax.

VAT% 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.

Est. VAT Tax Estimated VAT amount. Adjusting the time quantity, rate or VAT % recalculates the estimated VAT amount.

Note. The field is hidden if VAT is not applicable.

Sales Tax % / Use Tax % 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. Enables you to adjust the tax percentage which recalculates the Estimated Sales/Use Tax amounts.

Includes VAT Indicates if the estimated VAT amount should be added to the line amount before sales or use tax is calculated. If yes, the VAT amount is added to the line amount before sales/use tax is calculated. Otherwise, the line amount is used for VAT calculations.

Note. The field is hidden if VAT is not applicable.

Est. Sales Tax Estimated sales tax. Enables you to adjust the estimated sales tax for deliverables-based invoices.

Approving Invoices

The Manage Invoice Approval page is the central location for reviewing and approving invoices.

Note. We provide similar approval pages for the supplier role.

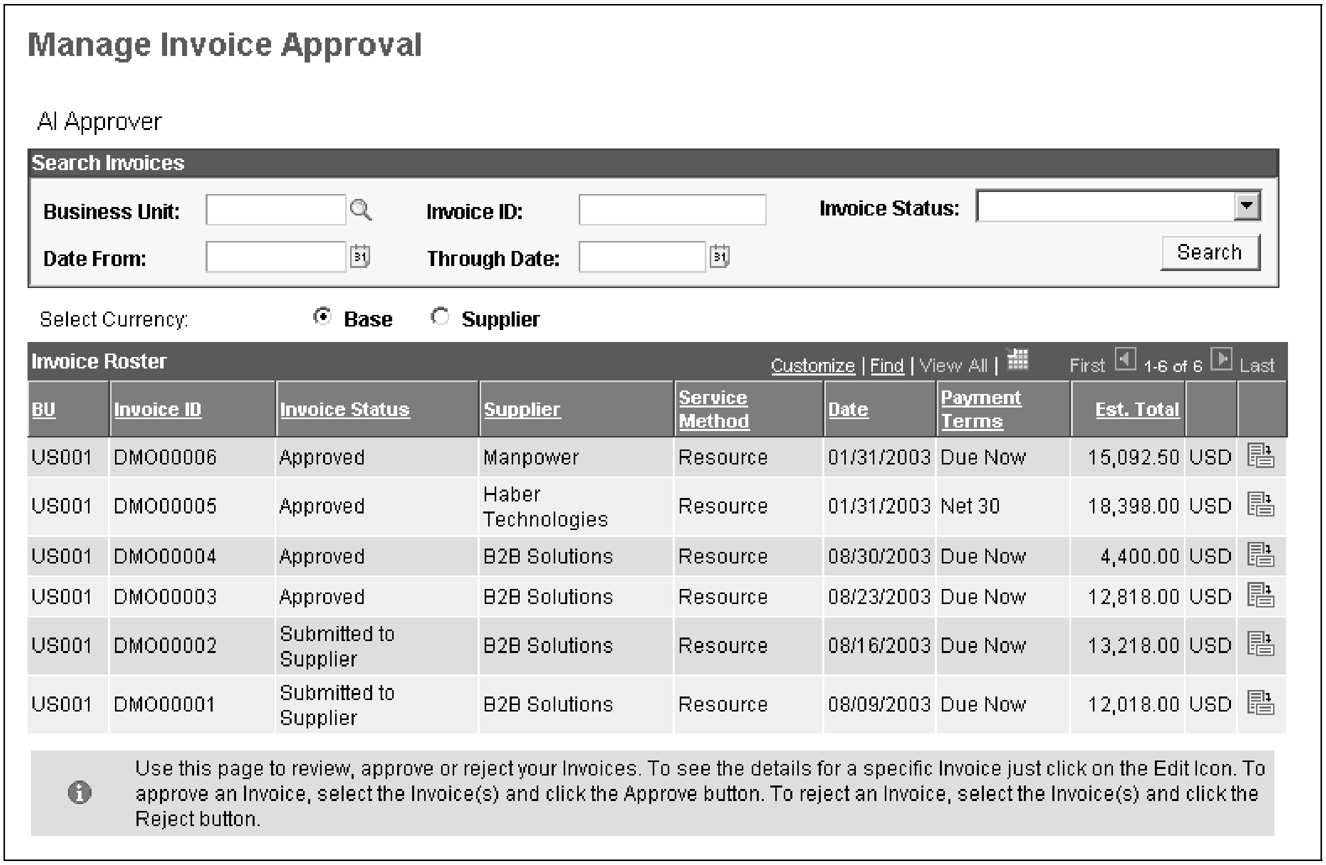
Pages Used to Manage Invoice Approval

Page Name	Object Name	Navigation	Usage
Manage Invoice Approval	SPF_INV_APR_MANAGE	Services Procurement, Services Settlement, Approve Invoices	Review, accept, or reject invoice approvals.
Invoice Approval Line Summary	SPF_INV_APR_LNDTL	Click the Invoice Approval Line Details button on the Manage Invoice Approval page.	View invoice lines that you are authorized to approve.
Invoice Approval Line Detail (resource based)	SPF_INV_APR_TIME_D	Click the Invoice Approval Line Summary button for a resource based invoice on the Invoice Approval Summary page.	View approvals for invoice line summary and enter comments before approving or rejecting the invoice line.
Invoice Approval Line Detail (deliverables based)	SPF_INV_APR_PLOG_D	Click the Invoice Approval Line Summary button for a deliverables based invoice on the Invoice Approval Summary page.	View approvals for invoice line summary and enter comments before approving or rejecting the invoice line.
Vendor Address	SPF_ADDRESS	Click the Vendor Address button on the Invoice Process Detail page.	View the vendor address.
Currency Information	EXCH_RT_DTL_INQ	Click the linked currency abbreviation on the Manage Invoices - Line Summary page.	View multicurrency information.
Work Order Details	SPF_WO_REQ_VEN_DT	Click a linked work order on the Manage Invoices - Line Summary page or Manage Invoices - Line Details 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 Time/Expense - Time/Expense Summary	SPA_TIME_LINES	For resource bases invoice, click the linked timesheet on the Manage Invoices - Line Details page.	View time reports.
Create Progress Log Submittal - Progress Log Summary	SPA_PLOG_LINES	For deliverables based invoice, click the linked progress log on the Manage Invoices - Line Details page.	View time reports.

Managing Invoice Approvals

Access the Manage Invoice Approval page.

You can access this page when you log in as PeopleSoft Services Procurement approver.



Manage Invoice Approval

AI Approver

Search Invoices

Business Unit: Invoice ID: Invoice Status:

Date From: Through Date: Search

Select Currency: Base Supplier

Invoice Roster Customize | Find | View All | First 1-6 of 6 Last

BU	Invoice ID	Invoice Status	Supplier	Service Method	Date	Payment Terms	Est. Total		
US001	DMO00006	Approved	Manpower	Resource	01/31/2003	Due Now	15,092.50	USD	
US001	DMO00005	Approved	Haber Technologies	Resource	01/31/2003	Net 30	18,398.00	USD	
US001	DMO00004	Approved	B2B Solutions	Resource	08/30/2003	Due Now	4,400.00	USD	
US001	DMO00003	Approved	B2B Solutions	Resource	08/23/2003	Due Now	12,818.00	USD	
US001	DMO00002	Submitted to Supplier	B2B Solutions	Resource	08/16/2003	Due Now	13,218.00	USD	
US001	DMO00001	Submitted to Supplier	B2B Solutions	Resource	08/09/2003	Due Now	12,018.00	USD	

Use this page to review, approve or reject your Invoices. To see the details for a specific Invoice just click on the Edit Icon. To approve an Invoice, select the Invoice(s) and click the Approve button. To reject an Invoice, select the Invoice(s) and click the Reject button.

Manage Invoice Approval page

Search and Sort Invoices

Enter criteria used to retrieve submitted invoices.

Note. This page only displays invoice and invoice lines that the login user is authorized to approve. Authorization is defined on the Work Order page when the work order is created. If an invoice requires approval from multiple approvers, the invoice header doesn't update to an Approved status until all approvals are complete. If the supplier is to be included in the invoice approval process, the flag must be set on the Services Supplier Information page. For the supplier, only the Service Provider Contact for each Service Provider can approve invoice lines.

Roster

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 that 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 only approve or reject invoices that have the status of *Submitted* or *Approved by Supplier*. Otherwise the approve/reject buttons are hidden.

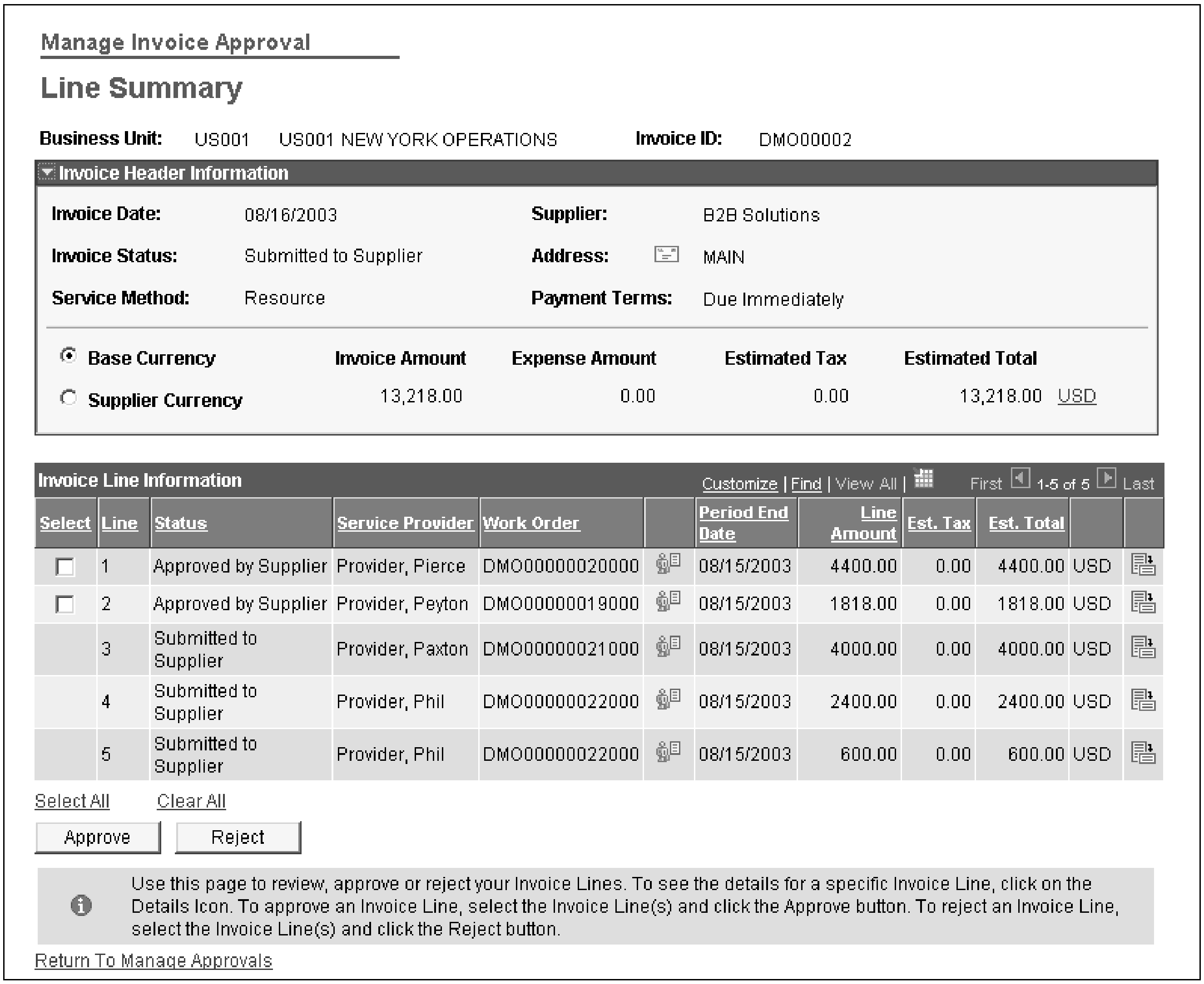
Note. You receive an error message if the sum of the invoiced amount (listed on the work order) and the amount of the invoice is greater than the PO amount.

Est. Total Displays estimated total in either supplier or base currency.

Viewing Invoice Approval Line Summary

Access the Manage Invoice Approval - Line Summary page.

You can access this page when you login as a PeopleSoft Services Procurement approver.



Manage Invoice Approval

Line Summary

Business Unit: US001 US001 NEW YORK OPERATIONS **Invoice ID:** DMO00002

Invoice Header Information

Invoice Date:	08/16/2003	**Supplier:**	B2B Solutions
Invoice Status:	Submitted to Supplier	**Address:**	MAIN
Service Method:	Resource	**Payment Terms:**	Due Immediately

	Invoice Amount	Expense Amount	Estimated Tax	Estimated Total
Base Currency				
Supplier Currency	13,218.00	0.00	0.00	13,218.00 USD

Invoice Line Information — Customize | Find | View All | First 1-5 of 5 Last

Select	Line	Status	Service Provider	Work Order		Period End Date	Line Amount	Est. Tax	Est. Total		
☐	1	Approved by Supplier	Provider, Pierce	DMO00000020000		08/15/2003	4400.00	0.00	4400.00	USD	
☐	2	Approved by Supplier	Provider, Peyton	DMO00000019000		08/15/2003	1818.00	0.00	1818.00	USD	
	3	Submitted to Supplier	Provider, Paxton	DMO00000021000		08/15/2003	4000.00	0.00	4000.00	USD	
	4	Submitted to Supplier	Provider, Phil	DMO00000022000		08/15/2003	2400.00	0.00	2400.00	USD	
	5	Submitted to Supplier	Provider, Phil	DMO00000022000		08/15/2003	600.00	0.00	600.00	USD	

Select All Clear All

Approve Reject

Use this page to review, approve or reject your Invoice Lines. To see the details for a specific Invoice Line, click on the Details Icon. To approve an Invoice Line, select the Invoice Line(s) and click the Approve button. To reject an Invoice Line, select the Invoice Line(s) and click the Reject button.

Return To Manage Approvals

Manage Invoice Approval - Line Summary page

Period End Date Date when the timesheet period ends.

Line Amount Total amount for the invoice line excluding expenses. Taxes are excluded.

Est. Tax Includes VAT and Sales tax, but not Use tax.

Est. Total Displays the sum of the line amount and the estimated tax.

Deliverables Based Invoice Approval

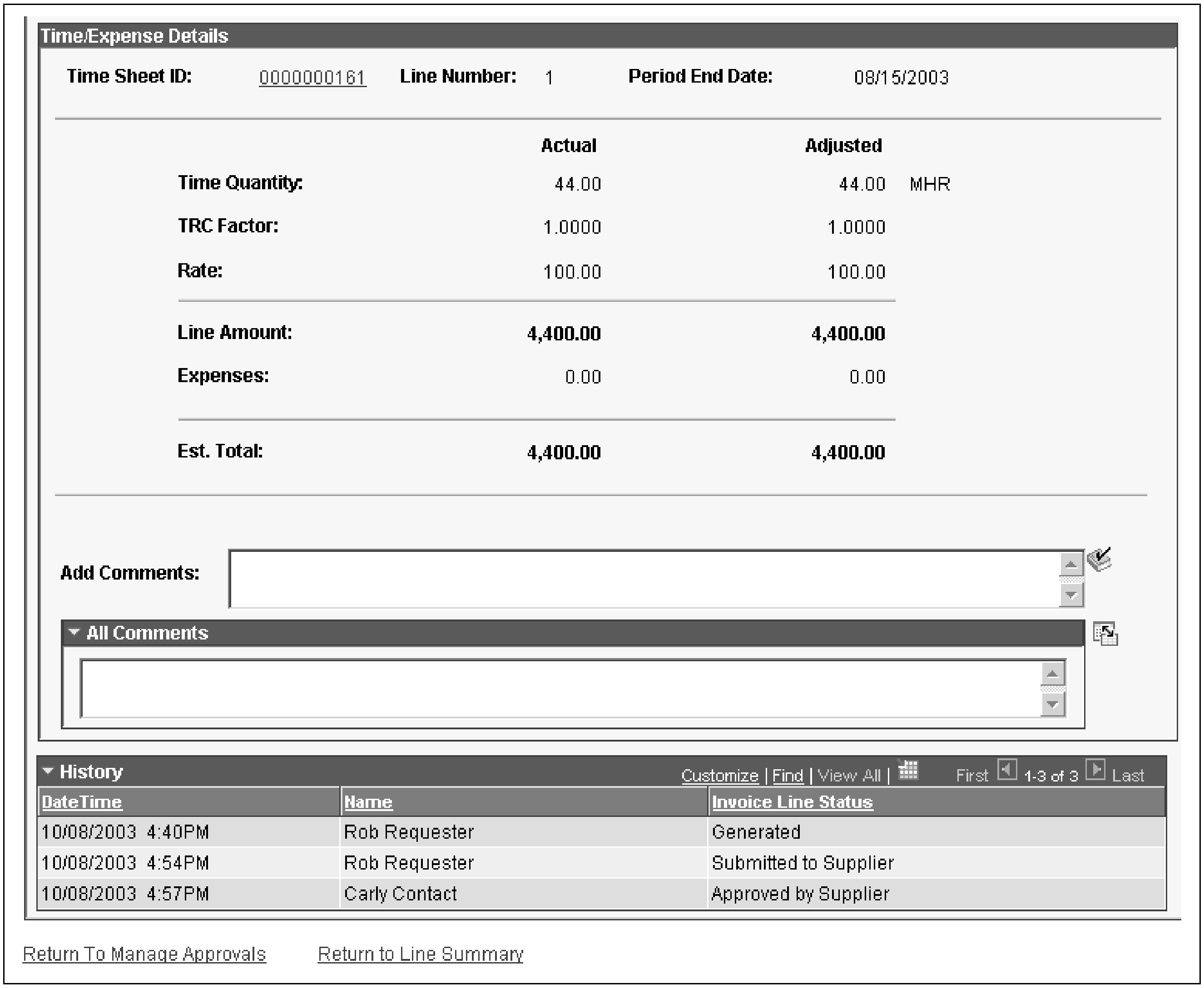
Activity This field is displayed for deliverables based requisitions for rate-based and milestone-based activities.

Percent Complete Not displayed for Milestone, Fixed Amount, and Rate Based progress logs.

Viewing Invoice Approval Line Details

Access the Manage Invoice Approval - Line Detail page.

Manage Invoice Approval - Line Detail (page 1 of 2)



Manage Invoice Approval - Line Detail (page 2 of 2)

The information appearing on this page depends on the selected service method and are similar to those found on the Invoice Line Detail page.

View invoice lines that you are authorized to approve and enter comments before approving or rejecting the invoice line.

See Also

Chapter 16, “Managing Settlements,” Viewing Invoice Line Detail, page 249

Triggering Worklist and Email Notifications

The following status changes trigger a worklist entry and an email notification:

Note. To receive an email, an email definition must be setup 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*.

- The invoice approver indicated on the work order receives a worklist entry and an email notification when the invoice status changes from *Submitted* or *Approved by Supplier*.
- The service provider contact for each service provider receives a worklist entry and an email notification when an invoice is submitted to a supplier.

The email notification contains the invoice ID, invoice date, invoice amount and a URL for the recipient to navigate to the invoice.

Managing Invoice Approval for Suppliers

This section discusses supplier invoice approval.

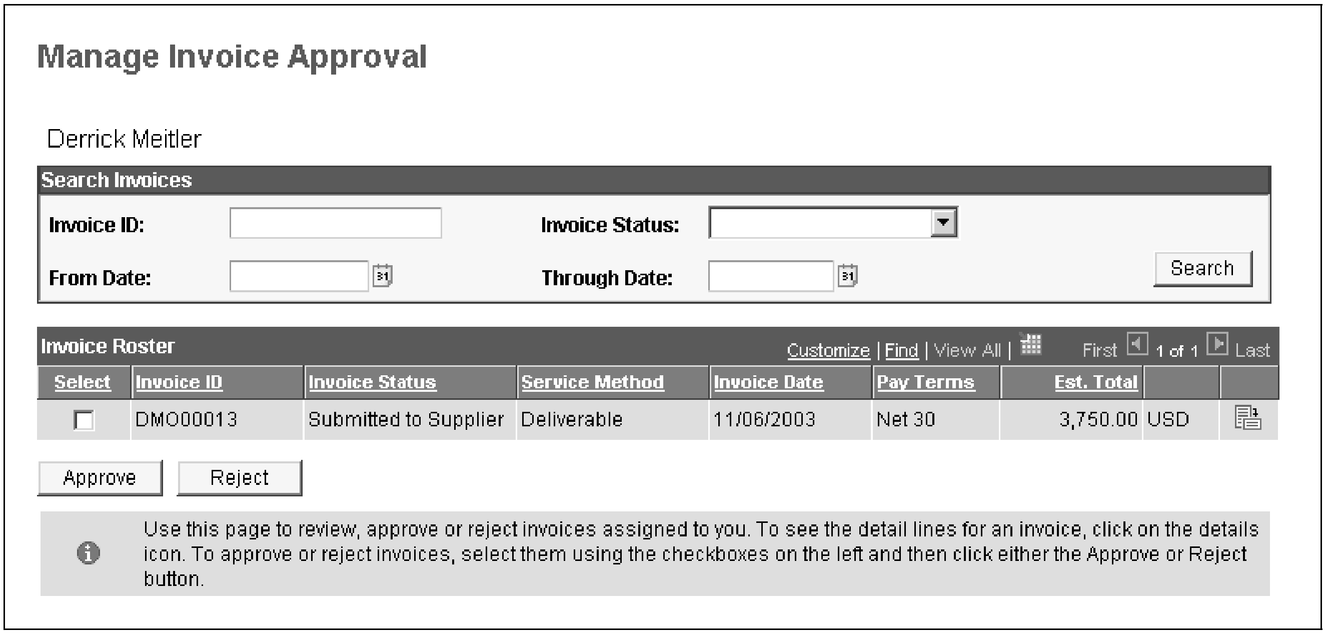
Invoices are routed to suppliers for approval if the *Include in Invoice Approval*.

Pages Used for Suppliers to Approve Invoices

Page Name	Object Name	Navigation	Usage
Manage Invoice Approval (external)	SPA_MG_SUP_INV_APR	Service Procurement, Approve Service Invoices	Review, accept, or reject invoice approvals as a Supplier Invoice Approver
Invoice Approval Line Summary (external)	SPA_SUP_INV_APR_LN	Click the Invoice Approval Line Details link on the Manage Invoice Approval page.	View invoice lines that you are authorized to approve as a Supplier Invoice Approver
Work Order Details	SPF_WO_REQ_VEN_DT	Click a linked work order on the Manage Invoices - Line Summary page or Manage Invoices - Line Details page.	View details of the work order related to the invoice.
Invoice Approval Line Detail (external)	SPA_SUP_INVAP_TIME	Click the Invoice Approval Line Summary link on the Supplier Invoice Approval Line Detail page.	View approvals for invoice line summary and enter comments before approving or rejecting the invoice line as a service provider.
Invoice Approval Line Detail (external)	SPA_SUP_INVAP_PLOG	Click the Invoice Approval Line Summary link on the Supplier Invoice Approval Line Detail page.	View approvals for invoice line summary and enter comments before approving or rejecting the invoice line as a service provider.
Approve Time/Expense - Time/Expense Summary	SPA_TIME_LINES	For resource bases invoice, click the linked timesheet on the Manage Invoices - Line Details page.	View time reports.
Create Progress Log Submittal - Progress Log Summary	SPA_PLOG_LINES	For deliverables based invoice, click the linked progress log on the Manage Invoices - Line Details page.	View time reports.

Approving Supplier Invoices

Access the external Manage Invoice Approval page.

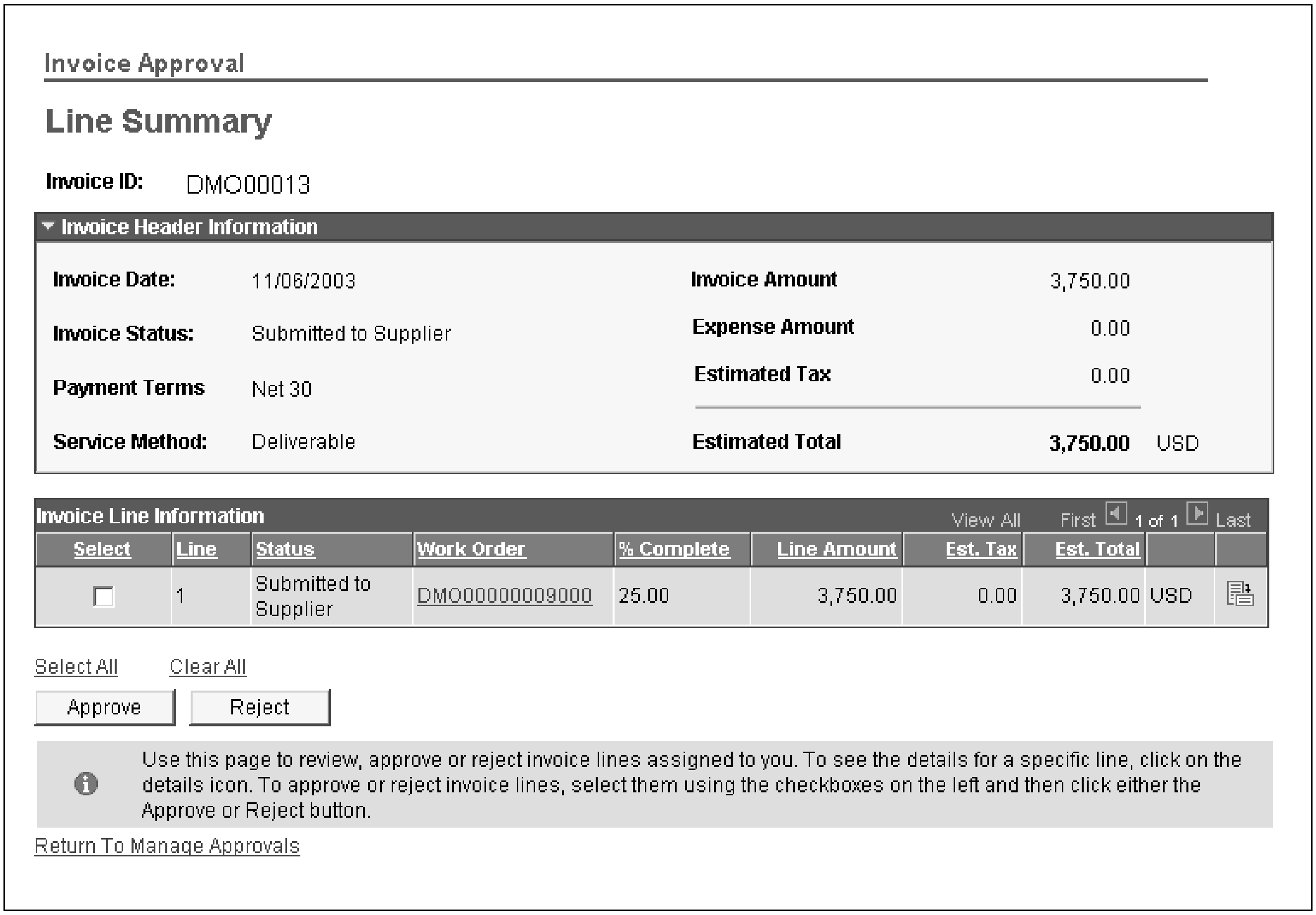


Manage Invoice Approval page (external)

Select the invoice to approve.

Viewing Invoice Details

Access the Invoice Approval - Line Summary page.



Invoice Approval

Line Summary

Invoice ID: DMO00013

Invoice Header Information

Invoice Date:	11/06/2003	**Invoice Amount**	3,750.00	
Invoice Status:	Submitted to Supplier	**Expense Amount**	0.00	
Payment Terms	Net 30	**Estimated Tax**	0.00	
Service Method:	Deliverable	**Estimated Total**	**3,750.00**	USD

Invoice Line Information View All First 1 of 1 Last

Select	Line	Status	Work Order	% Complete	Line Amount	Est. Tax	Est. Total		
☐	1	Submitted to Supplier	DMO00000009000	25.00	3,750.00	0.00	3,750.00	USD	

Select All Clear All

Approve Reject

Use this page to review, approve or reject invoice lines assigned to you. To see the details for a specific line, click on the details icon. To approve or reject invoice lines, select them using the checkboxes on the left and then click either the Approve or Reject button.

Return To Manage Approvals

Invoice Approval - Line Summary page (external)

Select the invoice line to approve.

CHAPTER 17

Interactive Reports in PeopleSoft Services Procurement

This chapter provides an overview of analysis and discusses how to:

- Populate the datamart.
- Analyze service provider rosters.
- Analyze service provider performance.
- Analyze service provider length of stay.
- Analyze expense life cycle.
- 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. PeopleSoft delivers standard analysis pages that cover the most common user requirements.

See Also

“Preface,” Common Elements Used In This PeopleBook, page xxiv

Service Provider Metrics

Service provider metrics provide information on service providers broken out by department, manager, project, purchase order, and supplier:

- The service provider roster includes service provider project assignment information.
- 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, project, 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, project, 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 Datamart

You must populate the datamart before accessing the interactive report pages.

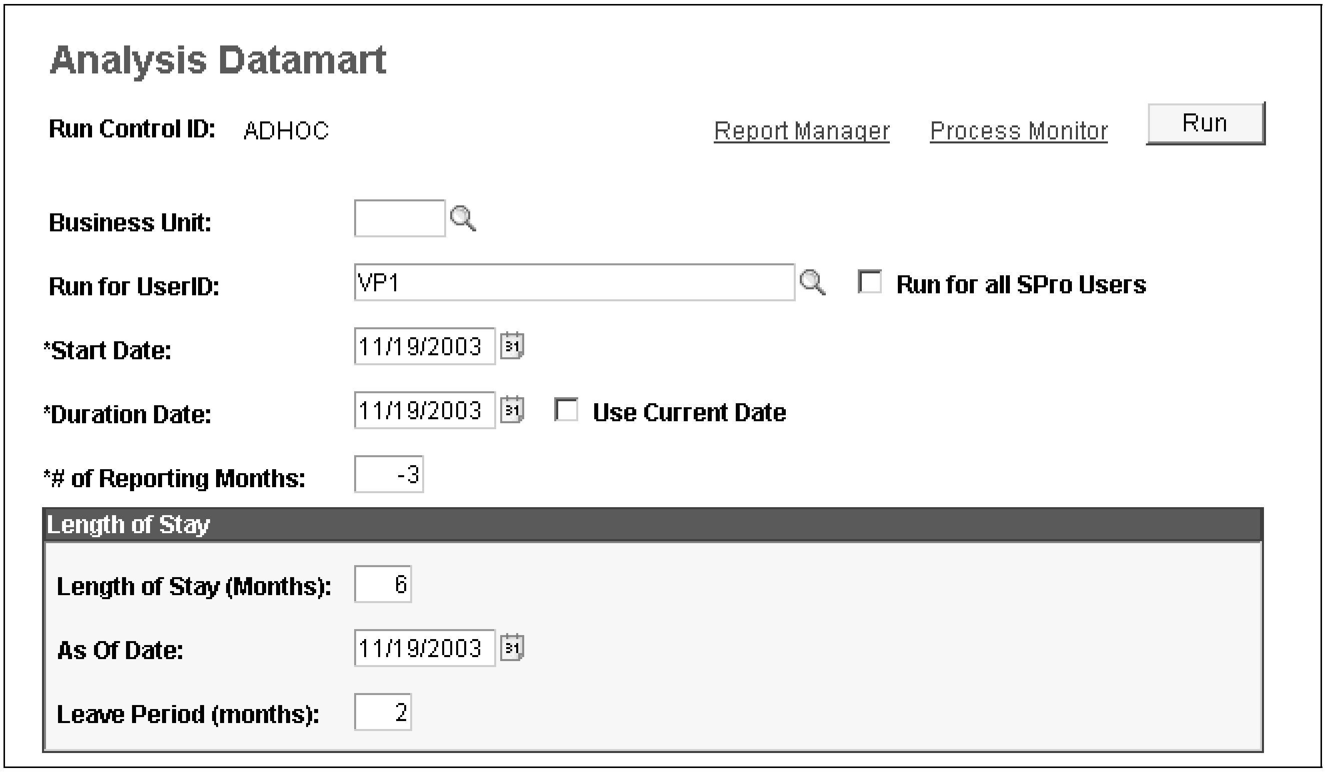
Note. If the datamart contains no data, a search page appears when you try to access an interactive reports page, but you can't progress from there.

page Used to Populate the Datamart

Page Name	Object 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 datamart for analysis purposes.

Populating the Datamart

Access the Analysis Datamart page.



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 datamart 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 value defaults to the current user.

Start Date

Enter the date that is used to determine the absolute begin date of the interactive report 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 that is 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, 2002, the duration date is June 30, 2002, and the number of reporting months is 12, indicating that you want 12 months of data prior to June 30, 2002, the system retrieves data only for the period between January 1, 2002 and June 30, 2002. Data prior to January 1, 2002, or in this example between July 1, 2001 and December 31, 2001, is not retrieved.

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 the duration date that are to be included in the process.

Note. The system does not retrieve date 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 8.44 PeopleBook: PeopleSoft Process Scheduler

Analyzing Service Provider Rosters

You use the service provider roster to analyze total service provider count by department, manager, project, purchase order, or supplier.

This section discusses how to:

- View service provider roster summary information.
- View service provider roster details.

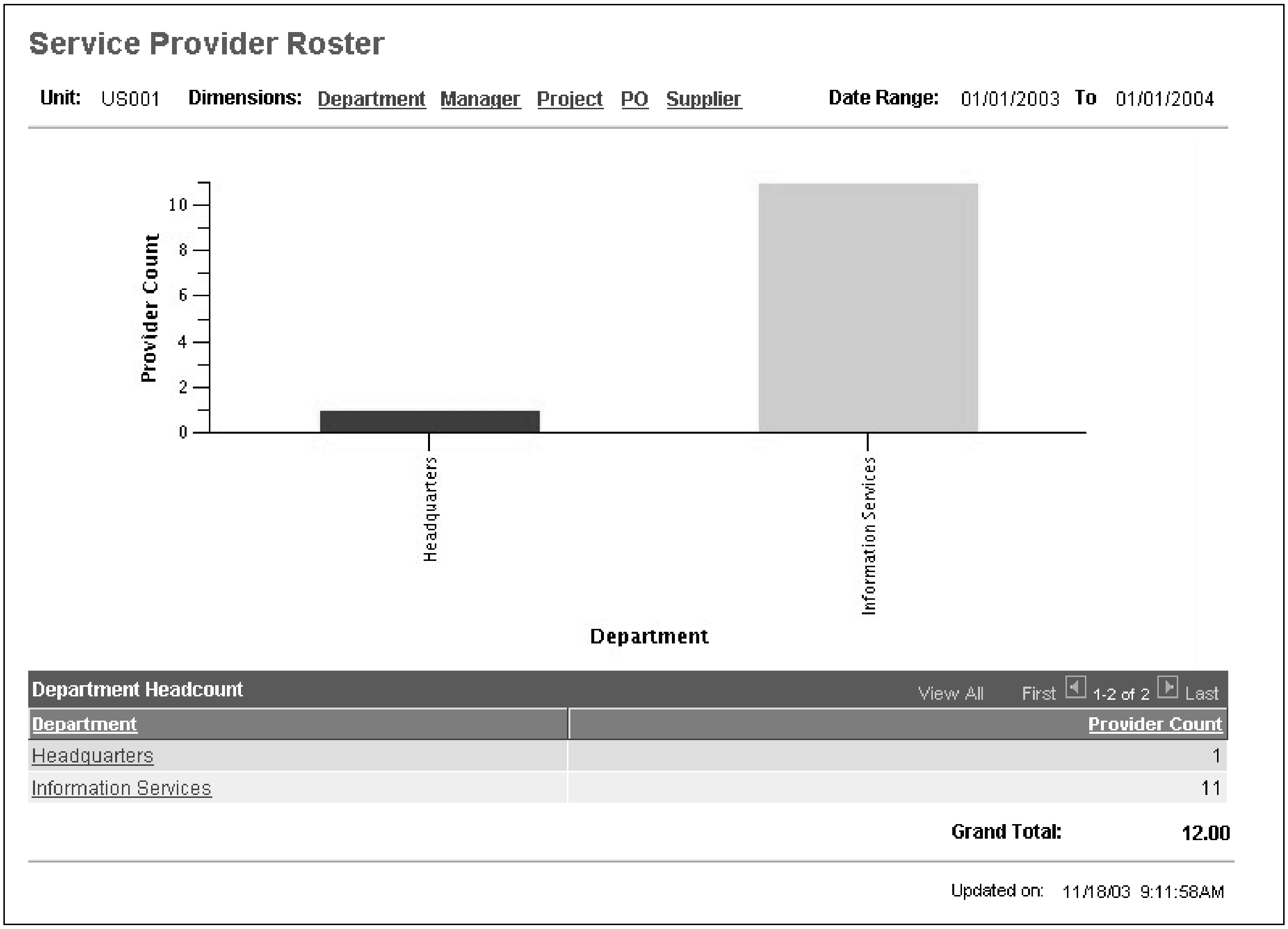
Note. This section uses the service provider roster department summary and details as an example. Similar functionality applies to the other dimensions (manager, project, purchase order, and supplier) and respective detail pages.

Pages Used to Analyze Service Provider Rosters

Page Name	Object 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 Roster - Department Details	SPR_CONSROSDR_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_CONSROSMR_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 - Project Details	SPR_CONSROSPR_PG	Click the Project link on the Service Provider Roster (summary) page for Project.	View detailed service provider roster information for a selected project.
Service Provider Roster - Purchase Order Details	SPR_CONSROSOR_PG	Click the Purchase Order 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_CONSROSSR_PG	Click the Supplier link from 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.



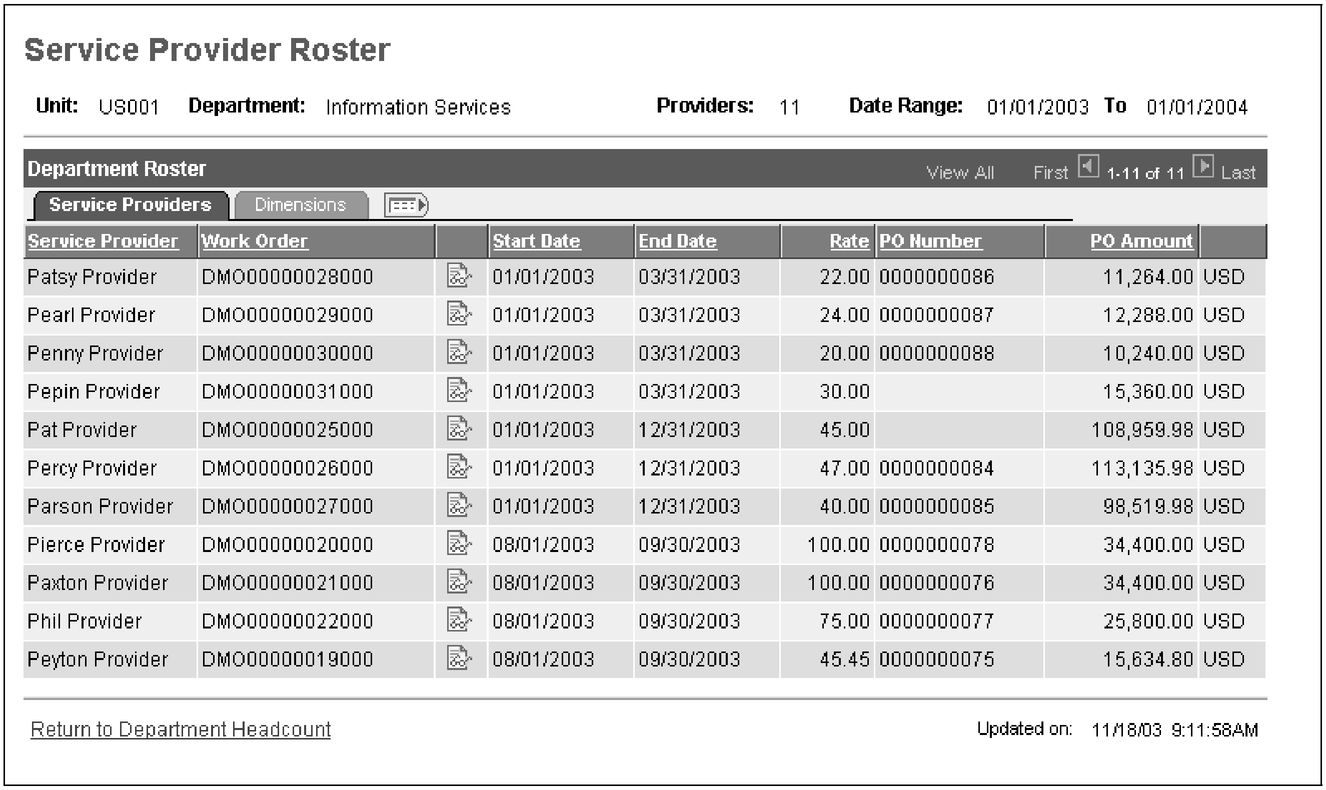
Service Provider Roster (summary) page

Department, Manager, Project, 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, project, purchase order, or supplier.

Provider Count
The total number of service providers appears for each department.

Viewing Service Provider Roster Details

Access the Service Provider Roster - Department Details page.


Service Provider Roster

Unit: US001 Department: Information Services Providers: 11 Date Range: 01/01/2003 To 01/01/2004

Department Roster View All First 1-11 of 11 Last

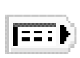
Service Providers | Dimensions

Service Provider	Work Order		Start Date	End Date	Rate	PO Number	PO Amount	
Patsy Provider	DMO00000028000		01/01/2003	03/31/2003	22.00	0000000086	11,264.00	USD
Pearl Provider	DMO00000029000		01/01/2003	03/31/2003	24.00	0000000087	12,288.00	USD
Penny Provider	DMO00000030000		01/01/2003	03/31/2003	20.00	0000000088	10,240.00	USD
Pepin Provider	DMO00000031000		01/01/2003	03/31/2003	30.00		15,360.00	USD
Pat Provider	DMO00000025000		01/01/2003	12/31/2003	45.00		108,959.98	USD
Percy Provider	DMO00000026000		01/01/2003	12/31/2003	47.00	0000000084	113,135.98	USD
Parson Provider	DMO00000027000		01/01/2003	12/31/2003	40.00	0000000085	98,519.98	USD
Pierce Provider	DMO00000020000		08/01/2003	09/30/2003	100.00	0000000078	34,400.00	USD
Paxton Provider	DMO00000021000		08/01/2003	09/30/2003	100.00	0000000076	34,400.00	USD
Phil Provider	DMO00000022000		08/01/2003	09/30/2003	75.00	0000000077	25,800.00	USD
Peyton Provider	DMO00000019000		08/01/2003	09/30/2003	45.45	0000000075	15,634.80	USD

Return to Department Headcount Updated on: 11/18/03 9:11:58AM

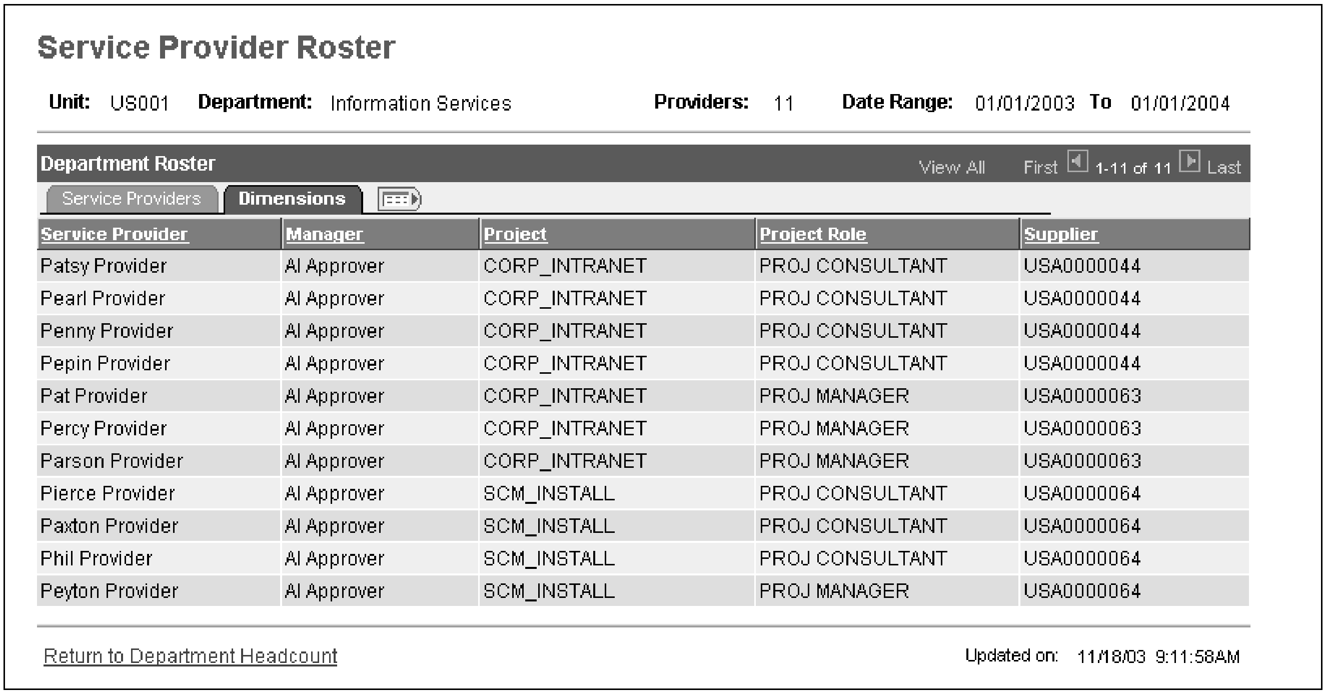
Service Provider Roster - Department Details page: Service Providers tab

The system displays detailed information about the service providers for the selected department.

	Click to view the work order.
	Click the Show All Columns button to view data from both the Service Providers tab and the Procurement Details tab.

Procurement Details Tab

Select the Procurement Details tab.



Service Provider Roster

Unit: US001 **Department:** Information Services **Providers:** 11 **Date Range:** 01/01/2003 **To** 01/01/2004

Department Roster View All First 1-11 of 11 Last

Service Providers | **Dimensions**

Service Provider	Manager	Project	Project Role	Supplier
Patsy Provider	Al Approver	CORP_INTRANET	PROJ CONSULTANT	USA0000044
Pearl Provider	Al Approver	CORP_INTRANET	PROJ CONSULTANT	USA0000044
Penny Provider	Al Approver	CORP_INTRANET	PROJ CONSULTANT	USA0000044
Pepin Provider	Al Approver	CORP_INTRANET	PROJ CONSULTANT	USA0000044
Pat Provider	Al Approver	CORP_INTRANET	PROJ MANAGER	USA0000063
Percy Provider	Al Approver	CORP_INTRANET	PROJ MANAGER	USA0000063
Parson Provider	Al Approver	CORP_INTRANET	PROJ MANAGER	USA0000063
Pierce Provider	Al Approver	SCM_INSTALL	PROJ CONSULTANT	USA0000064
Paxton Provider	Al Approver	SCM_INSTALL	PROJ CONSULTANT	USA0000064
Phil Provider	Al Approver	SCM_INSTALL	PROJ CONSULTANT	USA0000064
Peyton Provider	Al Approver	SCM_INSTALL	PROJ MANAGER	USA0000064

Return to Department Headcount Updated on: 11/18/03 9:11:58AM

Service Provider Roster - Department Details page: Dimensions tab

The system displays the procurement details for the department.

Analyzing Service Provider Performance

You use the Service Provider Performance pages to analyze service provider performance by department, manager, project, or supplier.

Note. You use the service provider performance pages similar to the way that you use the service provider roster pages.

See Also

Chapter 17, "Interactive Reports in PeopleSoft Services Procurement," Analyzing Service Provider Rosters, page 268

Pages Used to Analyze Service Provider Performance

Page Name	Object 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 - Project Details	SPR_CONSPERPR_PG	Click the Project link from the Service Provider Performance (summary) page for project.	View detailed service provider performance information for a selected project.
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.

Rating (Avg) The average approver rating for the total number of service providers for the business unit appears for each department, manager, project, 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, project, purchase order, or supplier.

This section discusses how to:

- View service provider length-of-stay summary information.
- View service provider length-of-stay detail information.

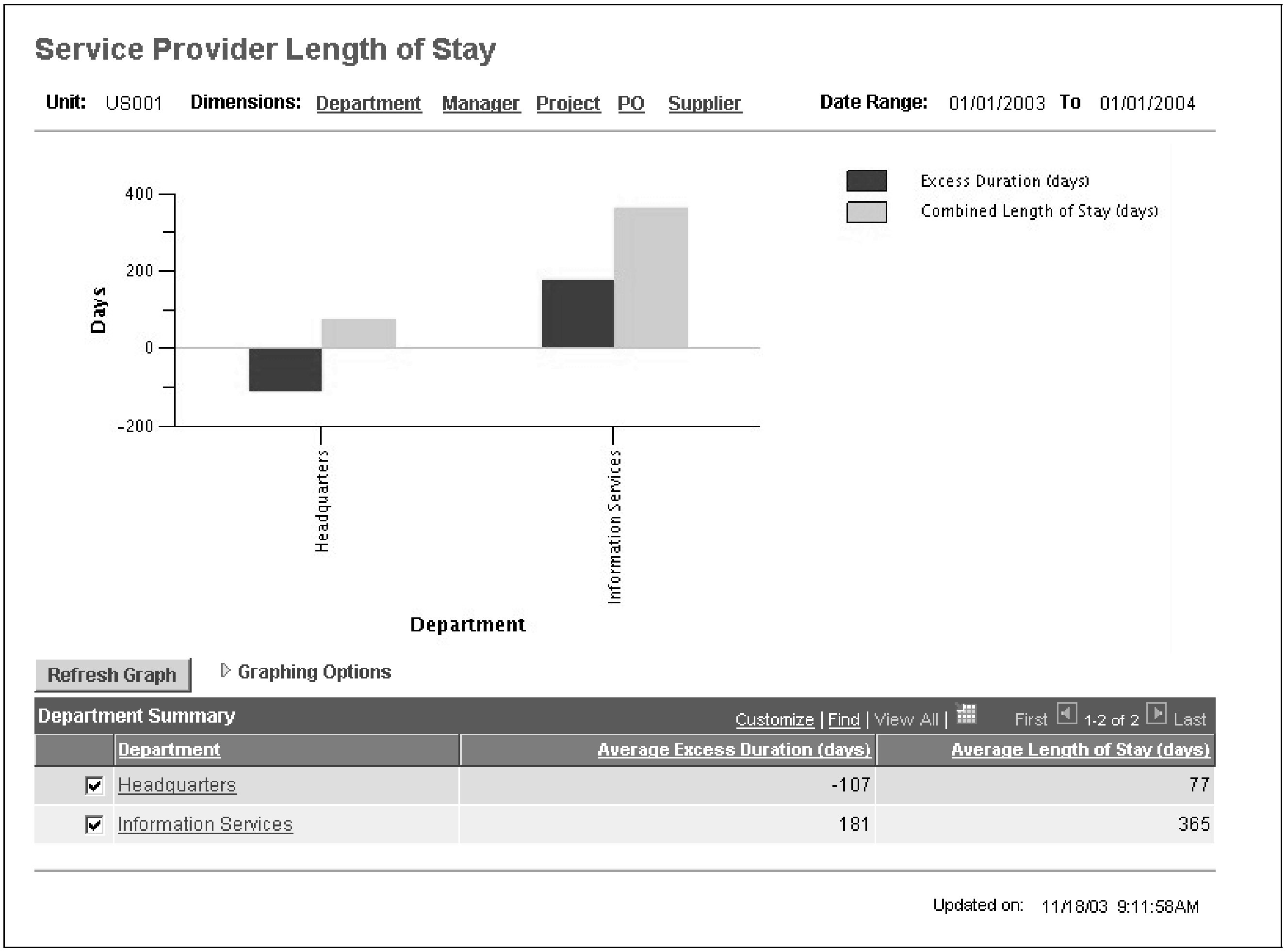
Note. This section uses the service provider length-of-stay manager summary and details as an example. Similar functionality applies to the other dimensions (department, project, purchase order, and supplier) and respective detail pages.

Pages Used to Analyze Service Provider Length of Stay

Page Name	Object 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 from 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 - Project Details	SPR_CONSLOSPR_PG	Click the Project link on the Service Provider Length of Stay (summary) page for project.	View detailed service provider length-of-stay information for a selected project.
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 from 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.



Service Provider Length of Stay (summary) page

Department, Manager, Project, 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, project, 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 Refresh Graph 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)

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)

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.

Service Provider Length of Stay - Manager Details page

The system displays detailed information about service providers for the manager.

Start Date

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 or 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 The start date plus the length of stay that is defined on the Analysis Datamart page.

End Date The end date that is associated with the work order ID.

Excess Duration (days) 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) The resulting calculation of start date less end date for all service providers for the service provider and work order.

Analyzing Expense Life Cycle

You use the expense life cycle pages to analyze expenses at each stage of the expense cycle and by account, department, manager, project, supplier, or work order.

This section provides an overview 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, project, supplier, and work order) and respective detail pages.

Understanding Expense Life Cycle Statuses

PeopleSoft 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.
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 those that are 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, PeopleSoft 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

Transaction Translate Value	Transaction Translate Value Description	Expense Life Cycle Status
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.

Invoice Status	Expense Life Cycle Status
Submitted to Supplier.	Invoiced - Not Approved.
Approved by Supplier.	Invoiced - Supplier Approved.
Rejected by Supplier.	Invoiced - Not Approved.
Cancelled.	N/A.
Adjusted.	Invoiced - Not Approved.

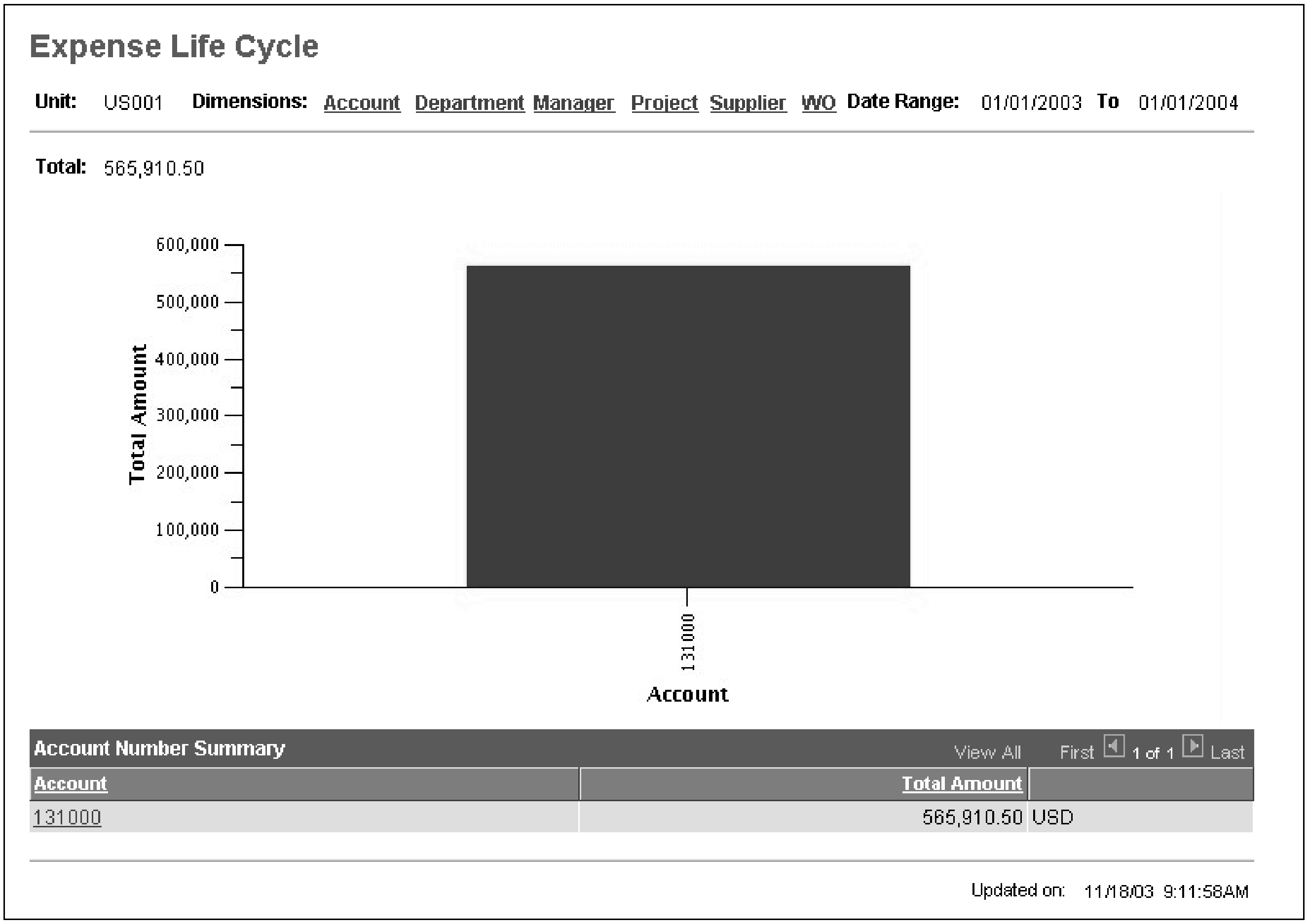
Note. Invoice entries are mapped for analysis purposes at the header level.

Pages Used to Analyze Expense Life Cycles

Page Name	Object 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 - Project by Status	SPR_EXPCYCPM_PG	Click the Project link on the Expense Life Cycle (summary) page for project.	View expenses that are incurred by project and status.
Expense Life Cycle - Project Details	SPR_EXPCYCPR_PG	Click the Status link on the Expense Life Cycle - Project by Status page.	View project 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.
Expense Life Cycle - Supplier Details	SPR_EXPCYCVR_PG	Click the Status on from 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.

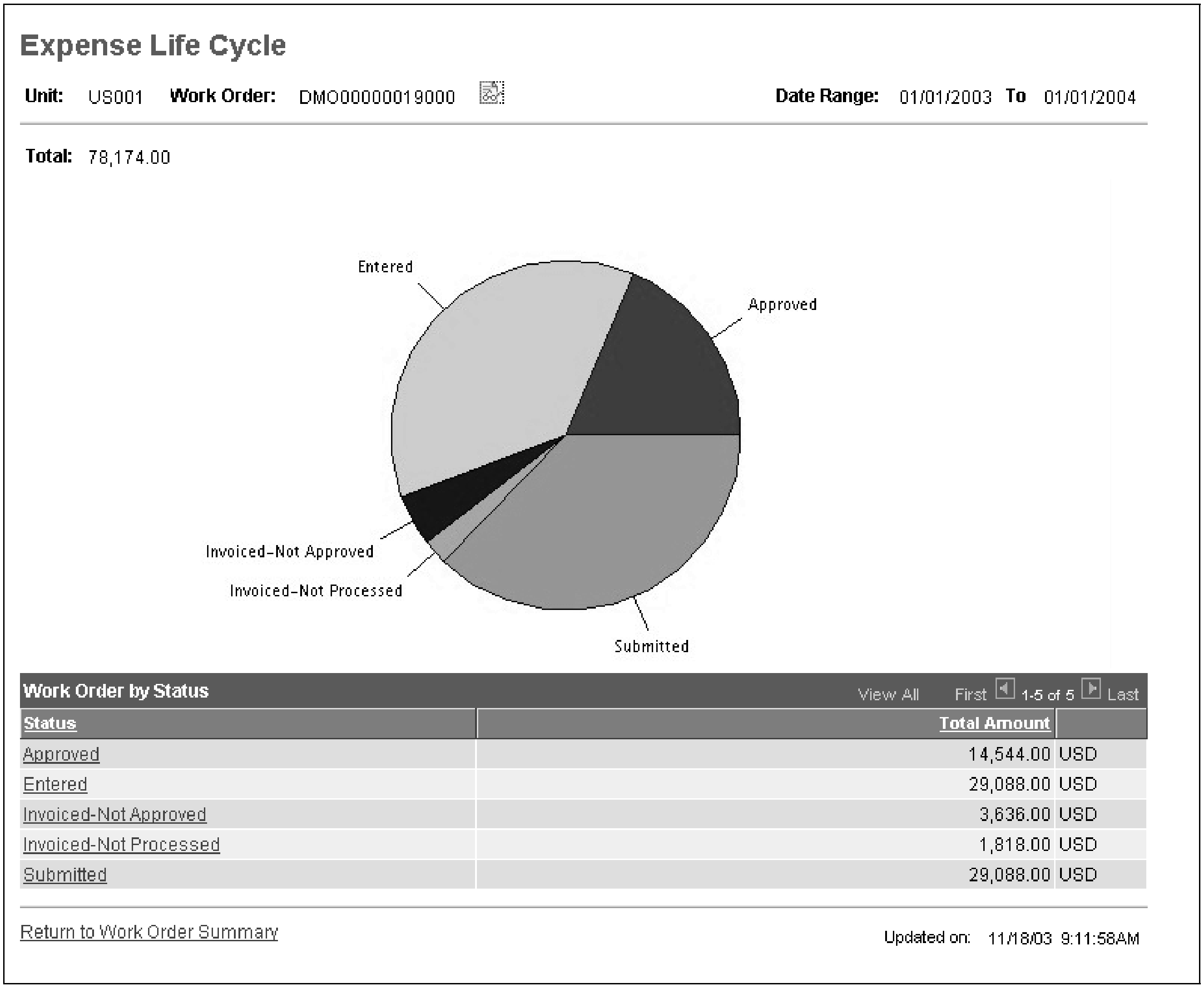


Expense Life Cycle (summary) page

Total Amount Total costs from time, expenses, and progress logs, including those in the various processing stages, by work order.

Viewing Expense Life Cycle by Expense Status

Access the Expense Life Cycle - Work Order by Status page. You can also access this page for account, department, manager, project, supplier, and work order.

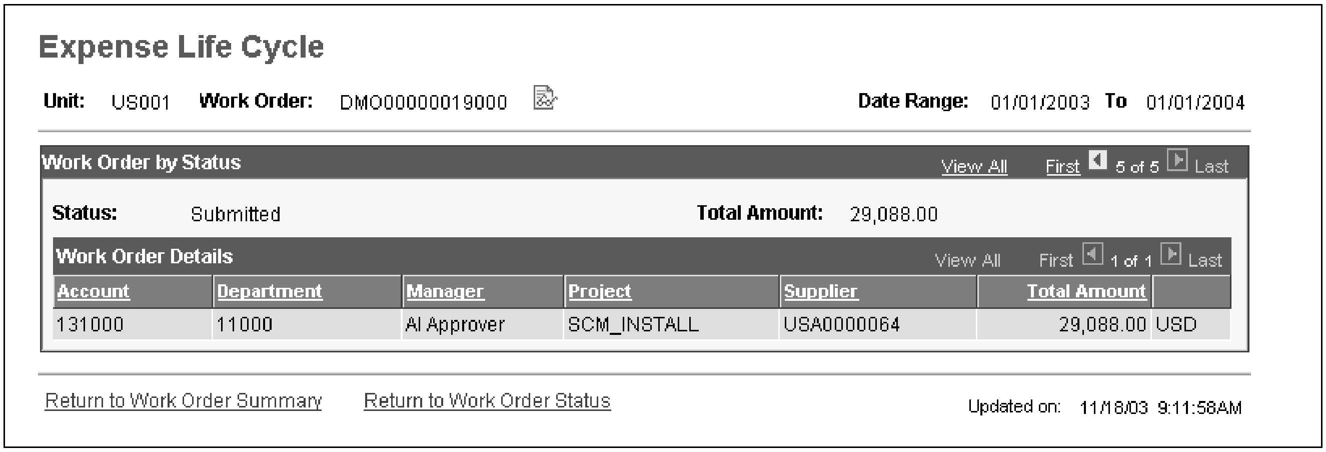


Expense Life Cycle - Work Order by Status page

Total Amount Total costs from time, expenses, and progress logs for the 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.



Expense Life Cycle - Work Order (and status) page

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, project, purchase order, or supplier.

This section discusses how to:

- View expense variance summary information.
- View expense variance details.

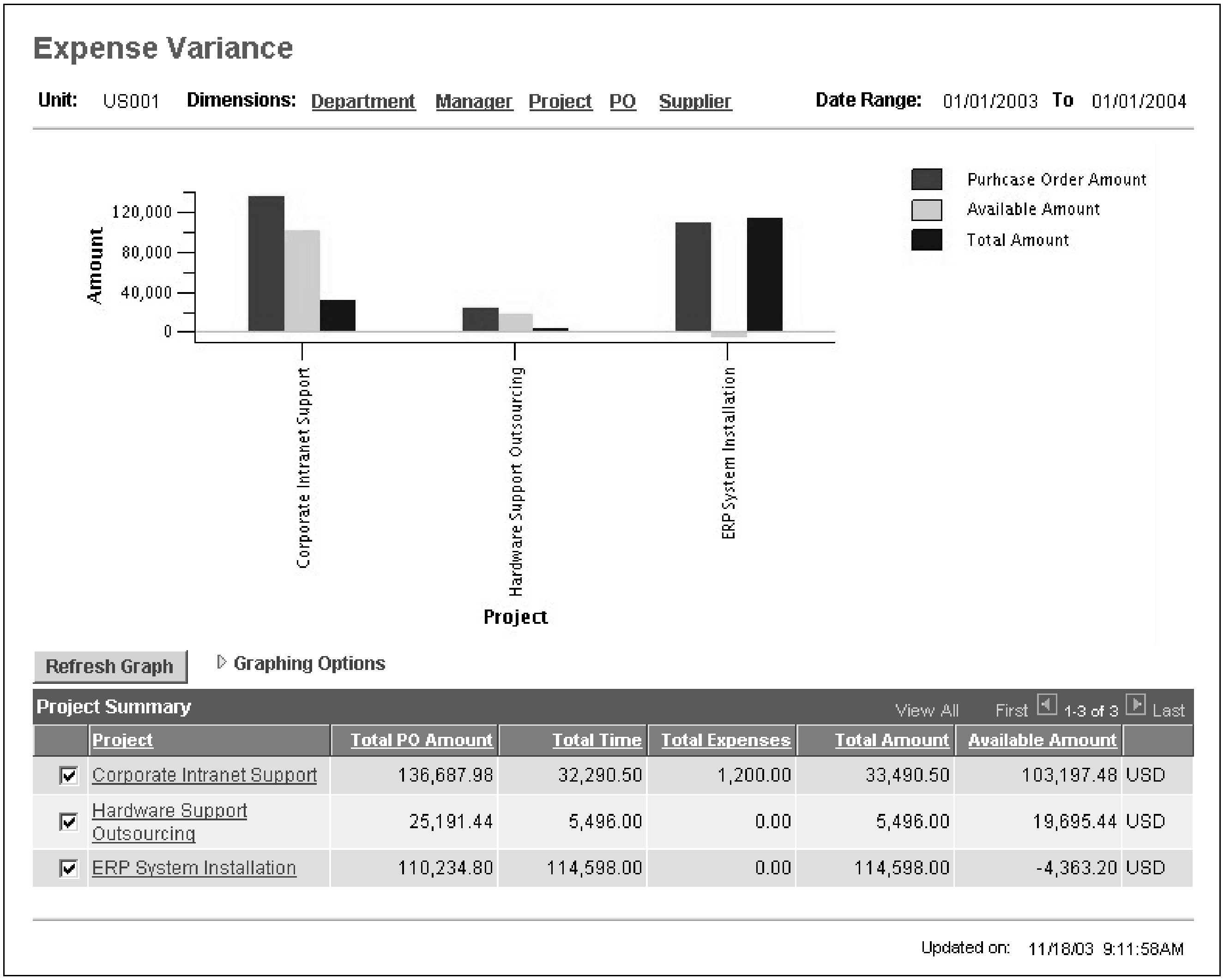
Note. This section uses the expense variance project summary and details as an example. Similar functionality applies to the other dimensions (department, manager, purchase order, and supplier) and respective detail pages.

Pages Used to Analyze Expense Variances

Page Name	Object 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 detail expense variance information for a selected department.
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 - Project Details	SPR_EXPVARPR_PG	Click the Project link on the Expense Variance (summary) page for project.	View detailed expense variance information for a selected project.
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.



	Project	Total PO Amount	Total Time	Total Expenses	Total Amount	Available Amount	
☑	Corporate Intranet Support	136,687.98	32,290.50	1,200.00	33,490.50	103,197.48	USD
☑	Hardware Support Outsourcing	25,191.44	5,496.00	0.00	5,496.00	19,695.44	USD
☑	ERP System Installation	110,234.80	114,598.00	0.00	114,598.00	-4,363.20	USD

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 Refresh Graph 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.

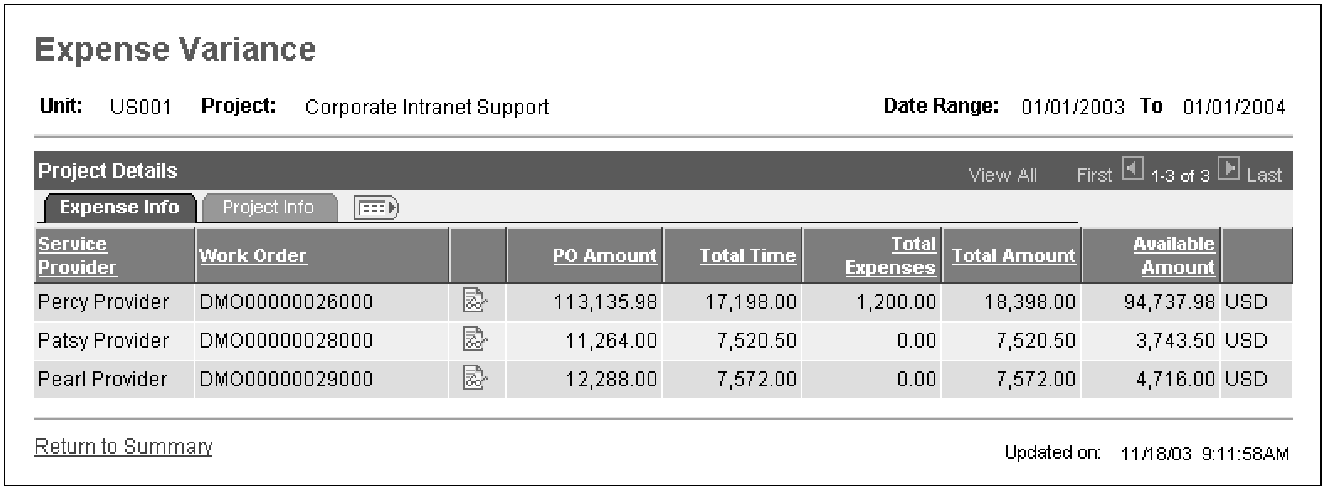
By default, the system graphs the first five selected data rows that appear in the grid. You can select more than five rows, but the information appears smaller on the graph.

Variance Amount

The difference between the total purchase order (PO) amount and forecast total.

Viewing Expense Variance Details

Access the Expense Variance (details) page.



Expense Variance

Unit: US001 Project: Corporate Intranet Support Date Range: 01/01/2003 To 01/01/2004

Project Details View All First 1-3 of 3 Last

Expense Info | Project Info

Service Provider	Work Order		PO Amount	Total Time	Total Expenses	Total Amount	Available Amount	
Percy Provider	DMO00000026000		113,135.98	17,198.00	1,200.00	18,398.00	94,737.98	USD
Patsy Provider	DMO00000028000		11,264.00	7,520.50	0.00	7,520.50	3,743.50	USD
Pearl Provider	DMO00000029000		12,288.00	7,572.00	0.00	7,572.00	4,716.00	USD

Return to Summary Updated on: 11/18/03 9:11:58AM

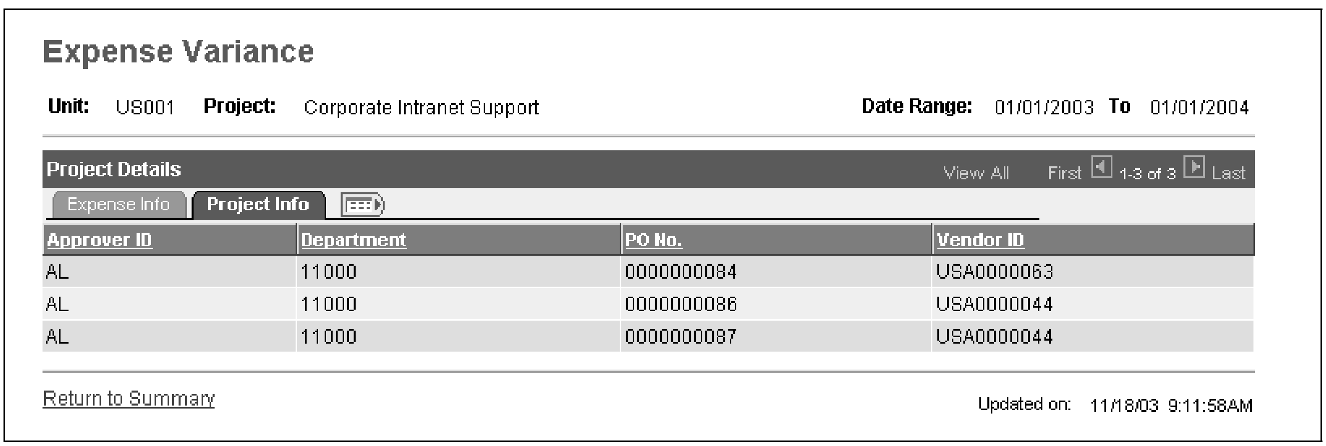
Expense Variance - Project Details page: Expense Info tab

The system displays detailed expense information about the service providers for the selected project.

Click the Show All Columns button to view data from both the Expense Info tab and the Project Info tab.

Project Info Tab

Select the Project Info (information) tab.



Expense Variance

Unit: US001 Project: Corporate Intranet Support Date Range: 01/01/2003 To 01/01/2004

Project Details View All First 1-3 of 3 Last

Expense Info | Project Info

Approver ID	Department	PO No.	Vendor ID
AL	11000	0000000084	USA0000063
AL	11000	0000000086	USA0000044
AL	11000	0000000087	USA0000044

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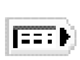
Expense Variance - Project Details page: Project Info tab

The system displays detailed expense information about the service providers for the selected project.



Click the Show All Columns button to view data from both the Expense Info tab and the Project Info 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	Object 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 for project.	View requisition and candidate statistics by supplier.
Service Supplier Performance - Role Details	SPR_SUP_RR_PG	Click the Role link from 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.

	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)

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 PO 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 Refresh Graph 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.

Workorders Tab

Select the Workorders tab.

View work order summary information for each supplier for the business unit.

Supplier Response Tab

Select the Response tab.

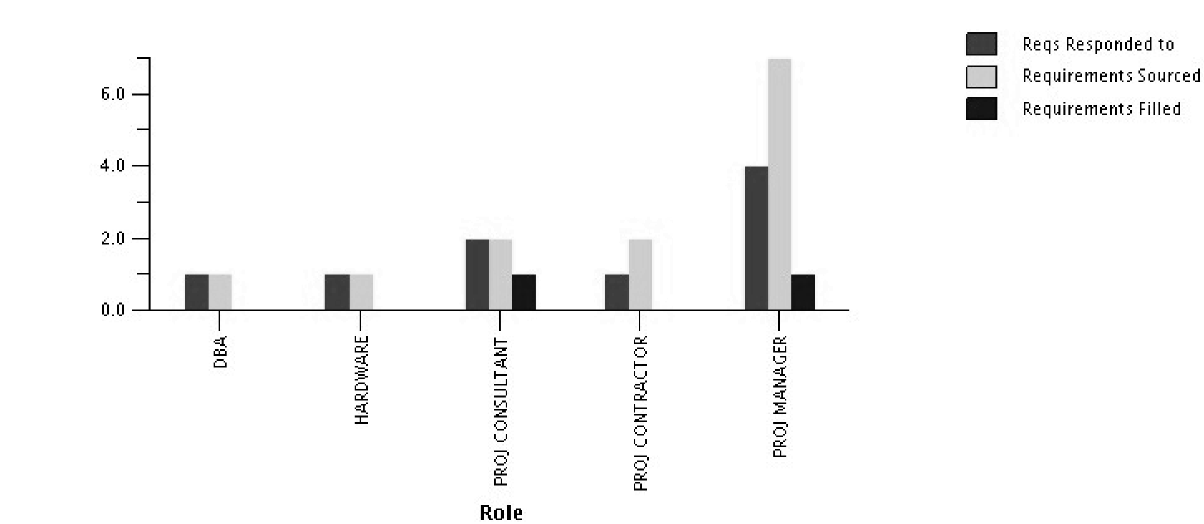
View supplier response time summary information by supplier for the business unit.

Viewing Service Supplier Performance Details

Access the Service Supplier Performance - Supplier Details page.

Service Supplier Performance

Unit: US001 **Supplier:** Manpower **Date Range:** 01/01/2003 **To** 01/01/2004



Refresh Graph ▷ Graphing Options

Performance Detail Customize | Find | View All | First 1-6 of 6 Last

Sourcing Information | Work Orders | Supplier Response

	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.

Workorders Tab

Select the Workorders tab.

View work order details by project role for a selected supplier.

Supplier Response Tab

Select the 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 page.

See Also

Chapter 17, "Interactive Reports in PeopleSoft Services Procurement," Analyzing Expense Life Cycle, page 277

Pages Used to Compare Supplier Rates

Page Name	Object 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

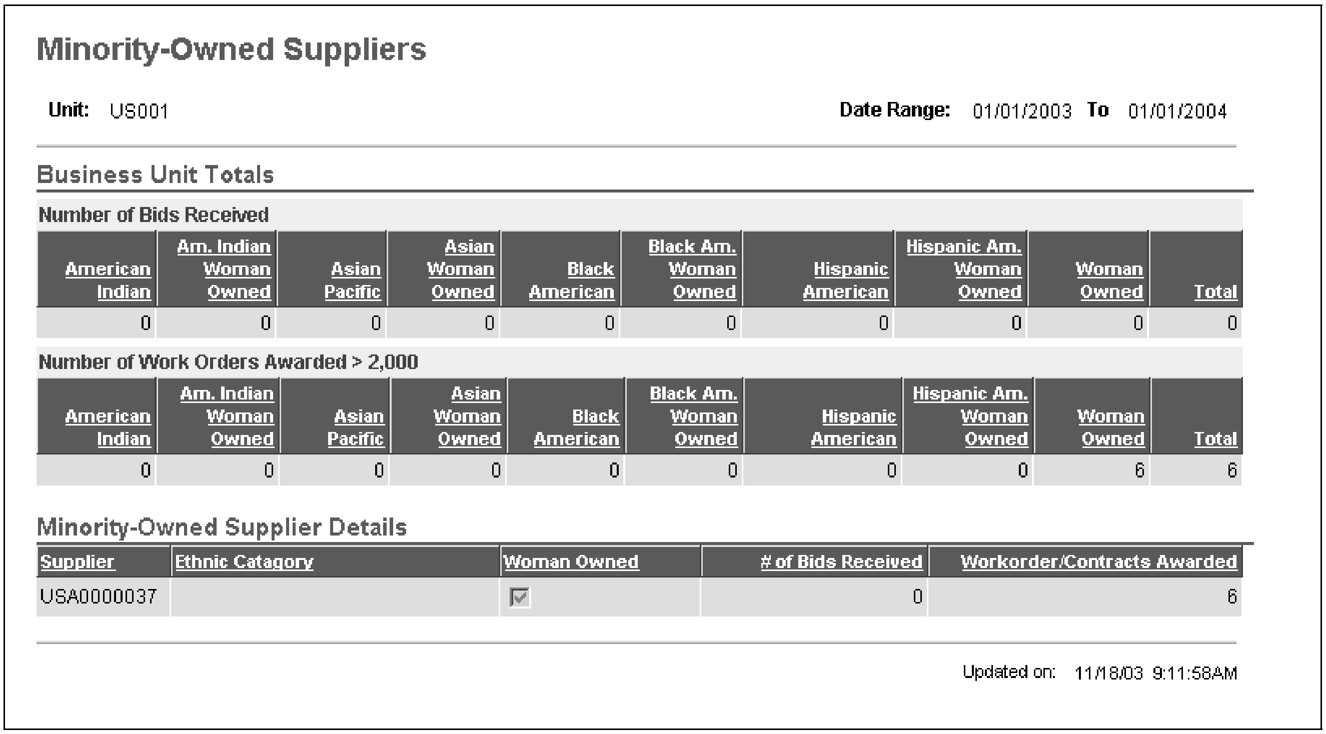
The Minority Owned Suppliers page shows a summary of the number of bids that minority-owned suppliers receive and the number of work orders that are awarded to each category for the business unit.

page Used to Analyze Minority-Owned Suppliers

Page Name	Object 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.



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

Updated on: 11/18/03 9:11:58AM

Minority-Owned Suppliers page

CHAPTER 18

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 a supplier metrics to help score, analyze, and compare suppliers across the requisition life cycle. Use supplier scoring to determine the best suppliers that meet your requisition requirements. We provide standard scoring setup pages to assist you in creating your 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 your 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 date from the PeopleSoft Services Procurement database.

Understanding The Supplier Scoring Process

The basic task flow of the service scoring process is as follows:

1. Access the Supplier Performance Level Codes page to setup supplier performance level codes.
2. Use the Supplier Scoring Rules page to setup 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 requisitions 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

Categorized temperance that is used to group supplier performance 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

This section discusses how to set up performance level codes.

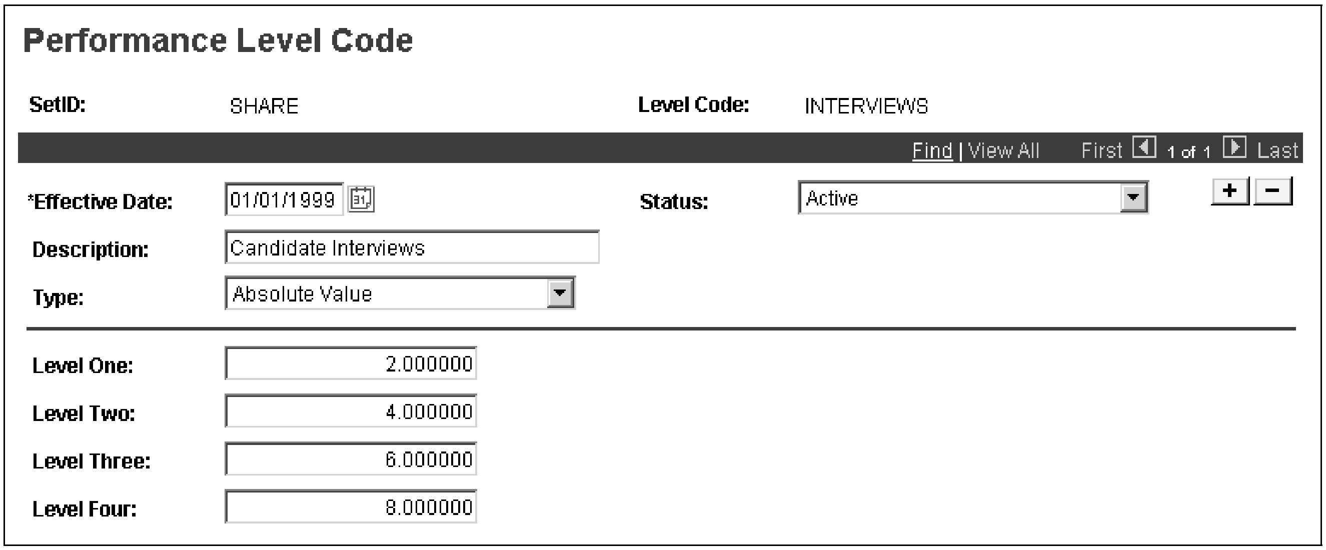
page Used to Set Up Performance Level Codes

Page Name	Object Name	Navigation	Usage
Performance Level Code	SPB_LVL_CD	Services Procurement, Define Services Procurement Click the Performance Level Code link in the Supplier Scoring group box.	Determine various levels at which suppliers perform.

Setting Up Performance Level Codes

To set up performance level codes, use the Performance Level Codes component.

Access the Performance Level Codes page.



Performance Level Codes page

Type

Select *Absolute Value* only.

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 schedules 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

This section discusses how to set up supplier scoring rules.

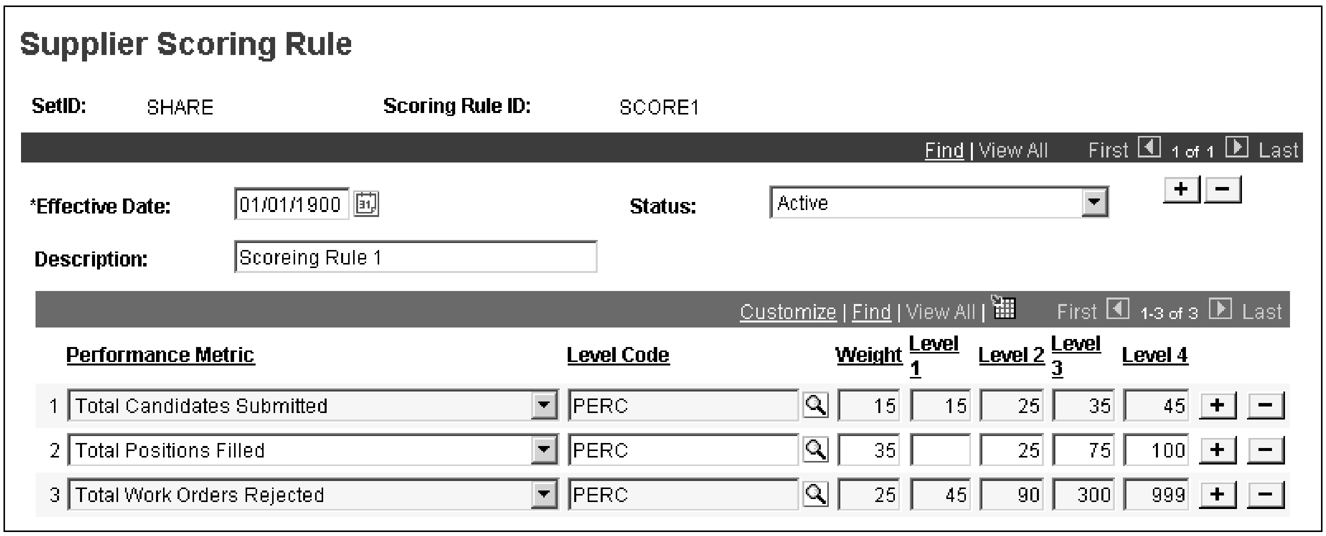
Pages Used to Set Up Supplier Scoring Rules

Page Name	Object Name	Navigation	Usage
Supplier Scoring Rules	SPB_SUP_SCORE_RULE	Services Procurement, Define Services Procurement Click the Supplier Scoring Rules link in the Supplier Scoring group box.	Define a supplier scoring rule that calculates supplier scoring metrics, level codes, weight, and performance level ranges.

Setting Up Supplier Scoring Rules

To set up supplier scoring rules, use the Supplier Scoring Rules component.

Access the Supplier Scoring Rules page.



Supplier Scoring Rules page

Performance Metrics Select one or more performance elements to calculate the supplier score.

Weight Enter the best possible weight that you want suppliers to receive.

Note. Enter a 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.
- Calculate supplier scores.

page Used to Set Up Supplier Scoring Parameters

Page Name	Object Name	Navigation	Usage
Services Procurement Business Unit Options	BUS_UNIT_TBL_SP	Services Procurement, Define Services Procurement Click the Services Procurement link in the Business Unit Definitions group box.	Define consolidation structures for accounting and reporting purposes.

Setting Up Supplier Scoring Parameters

Access the Services Procurement Business Units Options page.

Supplier Scoring

Scoring Rule ID Enter the scoring rule (group of metrics) that is used to score suppliers.

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

Start Date 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, 2002, the duration date is June 30, 2002 and number of reporting months is −12, indicating that you want 12 months of data prior to June 30, 2002, the system retrieves data only for the period between January 1, 2002 and June 30, 2002. Data prior to January 1, 2002, or in this example between July 1, 2001, and December 31, 2001, is not retrieved

Duration Start 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 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 data to be included in the process. Use a negative number to indicate the number of months prior 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.

Use Current Date Select to define duration date as the current system date. If it's selected, the system uses the number of reporting months relative to the current system date for each process instance.

See Also

Chapter 3, “Implementing Your PeopleSoft Services Procurement System,” Setting Up Business Units, page 25

Viewing 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 Supplier Scoring pages That Use Supplier Scoring

There are three Supplier Scoring pages.

page Name	Navigation	Usage
Sourcing Selection page.	Home, Worklist Click the link that corresponds with the requisition ID that you wish to source.	Enter sourcing requirements.
Supplier Scoring Results page.	Click the Vendor Score link on the Sourcing Selections page.	View the vendor score.
Services Procurement Business Unit Option.	Services Procurement, Define Services Procurement Click the Services Procurement link in the Business Unit Definitions group box.	Setup sourcing parameters.

APPENDIX A

Delivered Workflows for PeopleSoft Services Procurement

This appendix discusses delivered workflows for PeopleSoft Services Procurement.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Workflow

PeopleTools 8.44 PeopleBook: Using PeopleSoft Applications

Chapter 5, "Implementing PeopleSoft Services Procurement Workflow," page 87

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 an external service coordinator.
Action Description	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 (external)
Email Template	FREQTSC

Bid Reviewed

The section discusses the Bid Reviewed workflow.

Description

Event Description	The requester sends a bid response to an internal service coordinator.
Action Description	Notifies internal service coordinator that the requester has reviewed the bid.
Notification Method	Worklist, Email

Workflow Objects

Component	SPF_RBID_RSP_COMP
Role	Service Coordinator (internal employee)
Email Template	FRQTSC_E

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.
Action Description	Notifies the service coordinator that a bid has been submitted for a requisition line. Notifies an external service coordinator that a service provider has entered a bid on a requisition, a response for a bid on a requisition, or a bid without a requisition Notifies an internal service coordinator that a service provider has entered a response for a bid on a requisition, or a bid without a requisition.
Notification Method	Worklist, Email

Workflow Objects

Component	SPF_BID SPF_BIDRESPONSE SPF_SUBMITTAL
Role	Service coordinator (internal employee)
Email Template	S_RESPN_E S_RESPONSE CONBID CONBID_E

Communication Ended

The section discusses the Communication Ended workflow.

Description

Event Description	1. The requester sends a bid response to the service coordinator with the bid action of *End Communication*. 2. The service coordinator sends a bid response to the requester with the bid action of *End Communication*. 3. The service coordinator sends a bid response to the service provider contact with the bid action of *End Communication*. 4. The service provider contact sends a bid response to the service coordinator with the bid action of *End Communication*.
Action Description	1. Notifies the service coordinator that communication has ended for this bid. 2. Notifies the requester that communication has ended for this bid. 3. Notifies the service provider contact that communication has ended for this bid. 4. Notifies the service coordinator that communication has ended for this bid.
Notification Method	Email

Workflow Objects

Component	SPF_CBID_RSP_COMP
Role	1. Service Coordinator 2. Requester 3. Service Provider Contact 4. Service Coordinator

Email Template	1. ECREQTOSC 2. ECSCTOREQ 3. ECSCTOSPC 4. ECSPCTOSC

Decline Candidate

The section discusses the Decline Candidate workflow.

Description

Event Description	A candidate is declined.
Action Description	Notifies the service provider contact that a candidate has been declined on the work order.
Notification Method	Worklist and Email

Workflow Objects

Component	SPF_WORK_ORDER_CMP
Role	Service Coordinator Service Provider Contact
Email Template	WO_DECLNE_CND WO_DEC_1 (with requisition) WO_DEC_3 (without requisition)

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 Cancelled

The section discusses the Interview Cancelled workflow.

Description

Event Description	A scheduled interview is canceled.
Action Description	Notifies interviewer that their 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’ checked.
Action Description	Notifies interviewer that their interview has been rescheduled.
Notification Method	Email (only when ’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 they are scheduled to interview a candidate.
Notification Method	Worklist, Email (only when ’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

Invoice Approved by Supplier

The section discusses the Invoice Approved by Supplier workflow.

Description

Event Description	Invoice is approved by the internal 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 internal 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)

Progress Log Adjusted

The section discusses the Progress Log Adjusted workflow.

Description

Event Description	The progress log approver adjusts a progress log.
Action Description	Notifies the invoice manager (progress log creator) that their progress log was adjusted. Notifies the provider contact (progress log creator) that their progress log was adjusted.
Notification Method	Email

Workflow Objects

Component	SPA_PLOG
Role	Invoice Manager Provider Contact
Email Template	SP_PLADJ (invoice manager) SP_PLADJ2 (provider contact)

Progress Log Approved

The section discusses the Progress Log Approved workflow.

Description

Event Description	The progress log approver approves a progress log.
Action Description	Notifies the invoice manager (progress log creator) that their progress log was approved. Notifies the provider contact (progress log creator) that their progress log was approved.
Notification Method	Email

Workflow Objects

Component	SPA_MANAGE_PLOGS SPA_PLOG
Role	Invoice Manager Provider Contact
Email Template	SP_PL_MAS1 (invoice manager using SPA_MANAGE_PLOGS component) SP_PL_MAS2 (provider contact using SPA_MANAGE_PLOGS component) SP_PLAPR (invoice manager using SPA_PLOG component) SP_PLAPR2 (provider contact using SPA_PLOG component)

Progress Log Denied

The section discusses the Progress Log Denied workflow.

Description

Event Description	The progress log approver denies a progress log.
Action Description	Notifies the invoice manager (progress log creator) that their progress log was denied. Notifies the provider contact (progress log creator) that their progress log was denied.
Notification Method	Email

Workflow Objects

Component	SPA_PLOG
Role	Invoice Manager Provider Contact
Email Template	SP_PLDEN (invoice manager) SP_PLDEN2 (provider contact)

Progress Log On Hold

The section discusses the Progress Log On Hold workflow.

Description

Event Description	The progress log approver puts a progress log on hold.
Action Description	Notifies the invoice manager (progress log creator) that their progress log was put on hold. Notifies the provider contact (progress log creator) that their progress log was put on hold.
Notification Method	Email

Workflow Objects

Component	SPA_PLOG
Role	Invoice Manager Provider Contact
Email Template	SP_PLHLD (invoice manager) SP_PLHLD2 (provider contact)

Progress Log Submitted

The section discusses the Progress Log Submitted workflow.

Description

Event Description	The progress log creator submits a progress log for approval.
Action Description	Notifies the progress log approver that a progress log was submitted for approval.
Notification Method	Worklist, Email

Workflow Objects

Component	SPA_PLOG
Role	Progress Log Approver
Email Template	SP_PLSUB

Requisition Approved

The section discusses the Requisition Approved workflow.

Description

Event Description	A requisition is approved.
Action Description	Notifies an external service coordinator that a requisition has been approved and is ready to be sourced. Notifies an internal 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

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 been filled. Click to generate a work order so 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 and ready for sourcing. Notifies an internal service coordinator that a requisition has been reassigned to him and 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 as responded to a bid.
Notification Method	Worklist, Email

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	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

timesheet Submittal

The section discusses the timesheet Submittal workflow.

Description

Event Description	A service provider submits a timesheet.
Action Description	Notifies timesheet approver that a timesheet has been submitted for approval.
Notification Method	Worklist, Email

Workflow Objects

Component	TE_APPROVE_TIME SPA_TIME_ENTRY2
Role	timesheet Approver
Email Template	SP_TESUB

Time Report Adjusted

The section discusses the Time Report Adjusted workflow.

Description

Event Description	The time report approver adjusts a time report.
Action Description	Notifies service provider that their time report was adjusted.
Notification Method	Email

Workflow Objects

Component	SPA_TIME_ENTRY2
Role	Service Provider
Email Template	SP_TEADJ

Time Report Approved

The section discusses the Time Report Approved workflow.

Description

Event Description	The time report approver approves a time report.
Action Description	Notifies service provider that their time report was approved.

Notification Method	Email

Workflow Objects

Component	SPA_MANAGE_TE SPA_TIME_ENTRY2 TE_APPROVE_TIME
Role	Service Provider
Email Template	SP_TE_MASS SP_TEAPR

Time Report Denied

The section discusses the Time Report Denied workflow.

Description

Event Description	The time report approver denies a time report.
Action Description	Notifies service provider that their time report was denied.
Notification Method	Email

Workflow Objects

Component	SPA_TIME_ENTRY2 TE_APPROVE_TIME
Role	Service Provider
Email Template	SP_TEDEN

Time Report On Hold

The section discusses the Time Report On Hold workflow.

Description

Event Description	The timesheet approves puts a time report on hold.
Action Description	Notifies service provider that their time report was put on hold.
Notification Method	Email

Workflow Objects

Component	SPA_TIME_ENTRY2 TE_APPROVE_TIME
Role	Service Provider
Email Template	SP_TEHLD

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

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 originally assigned user that the work order has been reassigned. Notifies originally newly 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 or 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

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee’s job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer’s account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called “system-maintained account.”
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don’t exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document’s cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, “Introduction to Microsoft Word.” A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*
clone	In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

condition In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

cost profile A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row A cost transaction and amount for a set of ChartFields.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data elements Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).
	In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).
	In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.
	In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
KPI	An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file	Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also *compensation object.*
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

process definition Process definitions define each run request.

process instance A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

process job You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag
Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

reference data
In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object
In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction
In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing
In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object
In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data
Data that is extracted from a separate database and migrated into the local database.

REN server
Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester
In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

role
Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user
A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up
In a tree, to roll up is to total sums based on the information hierarchy.

run control
A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID
A unique ID to associate each user with his or her own run control table entries.

run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise’s other partners.

statutory account — Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step — In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level — In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier — A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField — You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger — An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period — In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree — A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate — To distribute a production version of the enterprise catalog to partners.

system function — In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet — A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing — Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency — The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

template — A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory — In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

TimeSpan — A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

trace usage
In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation
In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state
In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.

Translate table
A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree
The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

unclaimed transaction
In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header
Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

user interaction object
In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable
In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

VAT exception
Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt
Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration
Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension
Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse
A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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